



Project Plan – Entrepreneurship

1. Members

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2. Executive Summary

Dalio AI aims to revolutionize access to financial data through Artificial Intelligence agents. The platform allows analysts to query complex information using natural language, without needing SQL or APIs, and automatically generates charts, tables, and strategic insights in real time.

3. Problem Statement

Financial market analysts face challenges when accessing data scattered across multiple sources, often requiring technical knowledge. This makes the process slow, inefficient, and dependent on IT teams. There is a clear need for a tool that allows fast, accurate, and accessible queries using natural language directly.

4. Business Description

Dalio AI is a B2B solution for investment funds, family offices, and banks. The system connects to sources like B3, ANBIMA, and Bloomberg, allowing natural language queries with instant visualizations. Monetization will be scalable based on query volume, starting with a free plan and expanding as usage grows.

5. Business Objectives

Develop a functional MVP to validate the proposal with real users. Improve the accuracy of the AI agent, ensure an intuitive user experience, and implement data security mechanisms. The goal is to help analysts focus on strategic decisions without friction in accessing data.

6. Work Plan

Sprint 1 – Product and business definition

Sprint 2 – User research and ideation

Sprint 3 – Feature definition and screen prototyping

Sprint 4 – User validation and feedback

Sprint 5 – Improvements and first public version delivery

7. Scope

Dalio AI delivers fast, intelligent access to financial data without requiring technical skills. It automates the search and interpretation of market data, allowing analysts to get structured answers in the form of text, tables, and interactive graphs—improving decision quality and operational efficiency.

8. Target Customers

Financial institutions, investment funds, and family offices. Dario AI serves analysts with no technical background by enabling structured insights through automated queries and visual outputs.