



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.

Users can also interact through specialized chat interfaces, each tailored to specific financial contexts, and upload files to have them analyzed directly by the AI, enabling even deeper and more contextual insights.

3. Problem Statement

Financial market analysts face challenges accessing data scattered across multiple sources, often requiring technical expertise. This results in a slow, inefficient process that depends heavily on IT teams. There is a clear need for a solution that enables fast, accurate, and accessible data queries—using natural language directly, without relying on SQL or complex tools.

4. Business Description

Dalio AI is a B2B solution designed for investment funds, family offices, and banks. The system connects to key financial data sources such as B3, ANBIMA, and Bloomberg,

enabling natural language queries with instant visualizations—charts, tables, and insights generated in real time.

While the platform is primarily focused on institutional clients, it also offers custom plans for individual professionals, creating a bridge to the B2C market. Monetization is scalable based on query volume, starting with a free plan and expanding as usage grows.

5. Business Objectives

We have already developed a functional MVP, available at [Dalio-ai](#), to validate the proposal with real users. The next steps focus on improving the AI agent's accuracy, ensuring an intuitive user experience, and implementing robust data security mechanisms. The ultimate goal is to empower analysts to focus on strategic decision-making—without friction in accessing or interpreting financial data.

6. Work Plan

Sprint 1 – Product and business definition

Defined B2B positioning, core value proposition, and MVP scope.

Sprint 2 – User research and ideation

Identified user pain points and ideated key AI-driven features.

Sprint 3 – Feature definition and prototyping

Designed main screens, defined core functionalities, and started development.

Sprint 4 – User validation and feedback

Released MVP, collected real user feedback, and identified improvement areas.

Sprint 5 – Refinement and public release

Improved UX, fixed file upload and response issues, added macro indicators, enabled mobile support, automated the company repository, and added user account management.

7. Scope

Dalio AI delivers fast, intelligent access to financial data—no technical skills required.

It automates the search and interpretation of market information, enabling analysts to

receive structured answers in the form of text, tables, and interactive charts. This improves both decision quality and operational efficiency.

8. Target Customers

Financial institutions, investment funds, and family offices.

Dalio AI empowers analysts—even without technical backgrounds—by delivering structured insights through automated queries and visual outputs like charts and tables