Take-Home Interview

Objective

Every month or quarter, Product Specialists compile portfolio commentaries that are ultimately shared with clients. These commentaries are lengthy, hand-crafted, and vary widely by strategy. Your Task is to design and implement a solution to streamline or automate the creation of portfolio commentaries for the latest month or quarter similar to the previous commentaries. For this assignment, focus **solely** on the Market Context section. **Do not include** portfolio attribution or outlook sections.

You're welcome to use AI tools to write this application.

Explain your approach to generating this section, your design decisions, and any data or APIs used.

Input Material

You have three sample commentaries for different funds. Assume that comparable documents and data exist for all strategies over multiple quarters.

Scope & Time-Box

- 3-5 hours of focused effort
- Preferred languages / frameworks: Python (e.g., FastAPI, Flask)
- Use of LLM API is mandatory
- Any libraries, or external APIs are allowed as long as they are called out in your write-up

Functional & Non-Functional Requirements

Everything – from functional scope to non-functional qualities – is up to you. Make (and document) the assumptions you believe are reasonable; justify the trade-offs you choose.

Deliverables

1. Source Code: All code committed to a public Git repository
2. README (or equivalent):
   a. Setup & Execution steps
   b. The problem you focused on and why
   c. Architectural and design decisions
   d. Key assumptions and trade-offs
   e. What you would add with more time
3. *If utilized* AI Tools: All prompts used and tools you relied on

Submission

Email all the deliverables by **Sunday, 7 September 2025 – EOD**.