AI TRADER

TEAM AI TRADERS
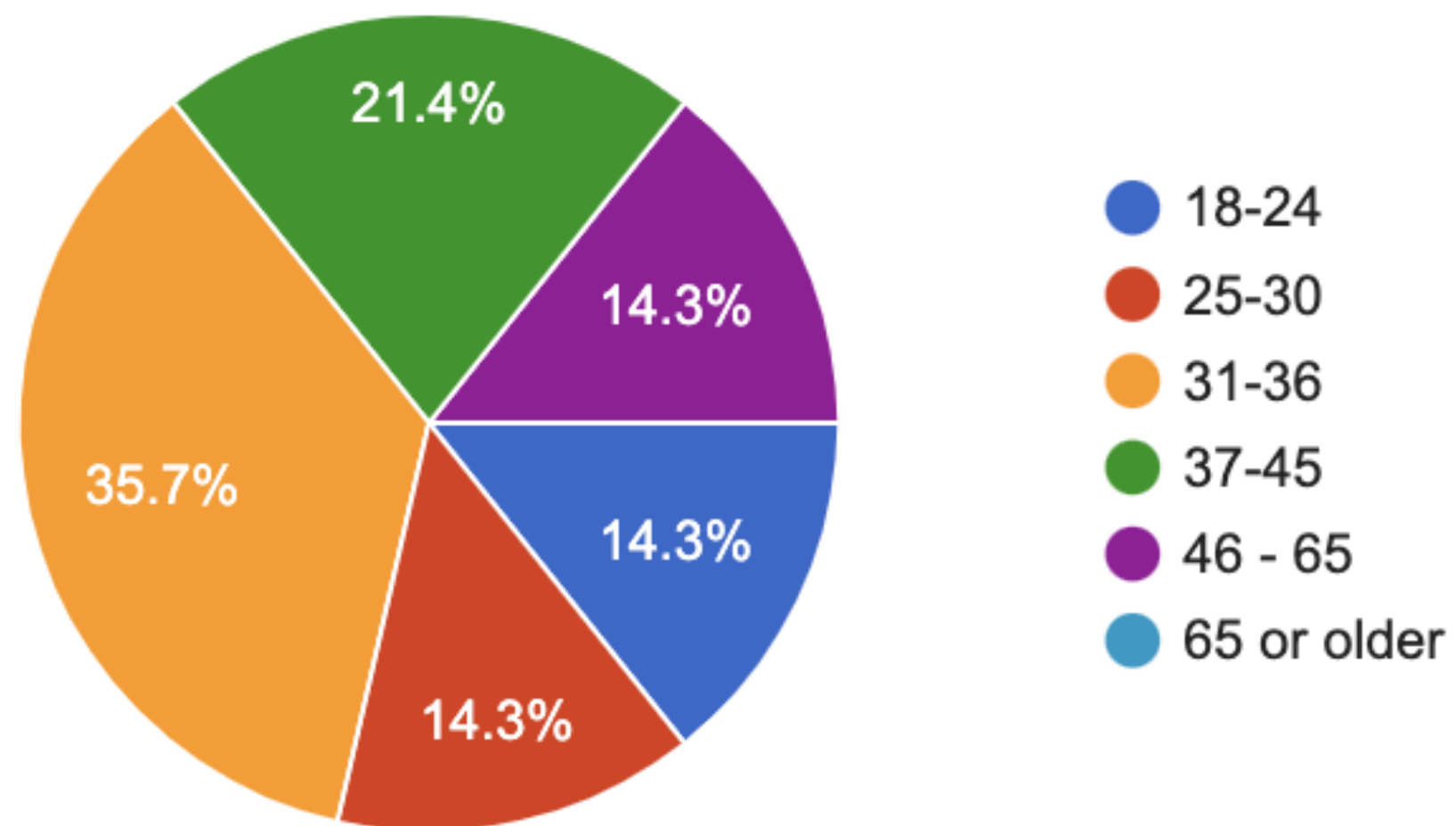
Google Cloud Vertex AI Hackathon - July 7 - July 10, 2023
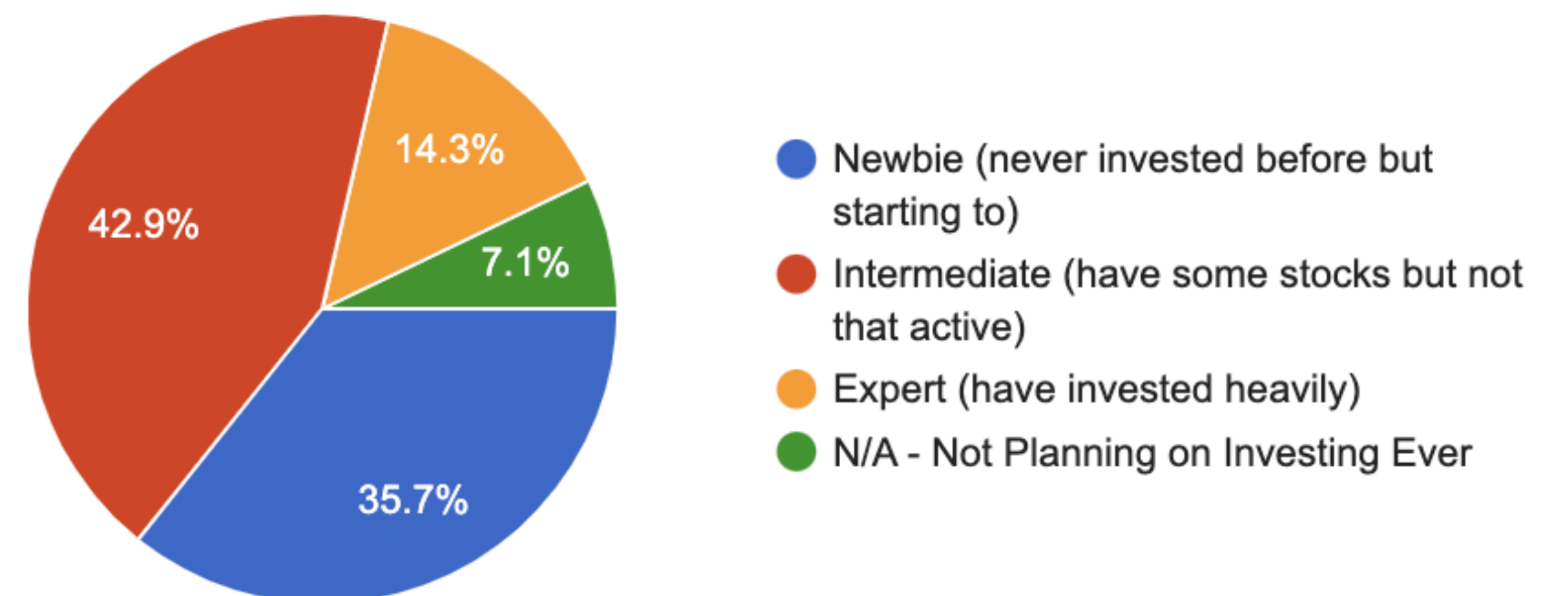
USER PAIN ANIMATION

Primary User Research

Age Range of Surveyed Users

- 21.4% 37-45
- 14.3% 46 - 65
- 35.7% 31-36
- 14.3% 18-24
- 14.3% 25-30

Legend:
- 18-24
- 25-30
- 31-36
- 37-45
- 46 - 65
- 65 or older

Investment Experience

- 42.9% Intermediate
- 14.3% Expert
- 7.1% N/A
- 35.7% Newbie

Legend:
- Newbie (never invested before but starting to)
- Intermediate (have some stocks but not that active)
- Expert (have invested heavily)
- N/A - Not Planning on Investing Ever

Mark Wilson

AGE	38
EDUCATION	Master's Degree in Education
STATUS	Married, 3 kids
OCCUPATION	High School Teacher
LOCATION	Chicago, IL

> " Education is not just about shaping minds, but also about building a solid foundation for a secure future. As a teacher and an investor, I strive to empower myself with financial knowledge to make informed decisions. "

Background

Mark Wilson is a 37-year-old high school teacher residing in Chicago, IL. He has some experience in investing, mainly focusing on stocks but not very actively. As a teacher, Mark values clear and concise information that enables him to stay informed about his investments without consuming too much time. He relies on financial news websites and occasionally seeks guidance from professional advisors for investment insights.

Goals

- **Financial Stability and Security:** To achieve financial stability and security. As a high school teacher, he wants to build a solid financial foundation that supports his future needs, such as retirement and unforeseen expenses. Mark aims to make informed investment decisions that generate steady returns and provide a sense of financial security.

- **Growth of Investment Portfolio:** To grow his investment portfolio over time. While he has some experience with stocks, he seeks to expand his investment knowledge and explore opportunities beyond his current holdings. Mark aims to diversify his portfolio by considering other asset classes, such as bonds or mutual funds, and identifying potential growth investments.

- **Time-Efficient Investment Management:** Given his busy schedule as a teacher, Mark's third goal is to manage his investments in a time-efficient manner. He seeks streamlined investment platforms and tools that provide clear and concise portfolio tracking, allowing him to stay updated on his investments without significant time commitments. Mark values efficient access to relevant information, simplified account management, and the ability to set and monitor investment goals.

Frustrations

- **Time Constraints:** One of Mark's primary challenges is the limited time he has available to dedicate to managing his investments. As a high school teacher, he is occupied with his teaching responsibilities and may struggle to find sufficient time for in-depth research or monitoring his investments regularly. This constraint can make it difficult for Mark to stay updated on investment trends and make timely adjustments to his portfolio.

- **Information Overload:** Mark may face the frustration of dealing with information overload when it comes to investment research. With a multitude of financial news websites, articles, and resources available, it can be overwhelming for him to filter through the vast amount of information and determine which sources are reliable and relevant to his investment decisions. Mark seeks a streamlined approach to accessing clear and concise information that aligns with his investment goals.

- **Balancing Risk and Reward:** Another challenge for Mark is navigating the balance between risk and reward in his investment decisions. As an intermediate investor, he desires to make informed choices that maximize returns while managing risk effectively. Mark may find it challenging to strike the right balance, especially when evaluating new investment opportunities or considering adjustments to his portfolio. He seeks guidance and tools that help him assess risk levels and make well-informed investment decisions.

Emma Johnson

AGE 32

EDUCATION Nursing Degree

STATUS Single

OCCUPATION Nursing Assistant

LOCATION Brooklyn, NY

> " As a newbie investor who gets her investment advice from TikTok, I am actively seeking reliable information from a financial app that I trust. My goal is to gain financial knowledge and confidence, and start building a solid investment portfolio. "

Background

Emma Johnson, a 28-year-old graphic designer from Brooklyn, NY, combines her creative background with a passion for technology. As a newbie investor, she seeks to gain financial knowledge and confidence while leveraging social media platforms like TikTok for reliable information. Emma aspires to build a solid investment portfolio. With her creative mindset and tech-savviness, Emma is open to exploring web apps and digital tools that simplify the investment process. She values user-friendly interfaces and seeks a trustworthy financial app that provides accurate information, valuable resources, and support. Emma's determination to succeed and grow her financial literacy positions her to make informed investment decisions that secure her future.
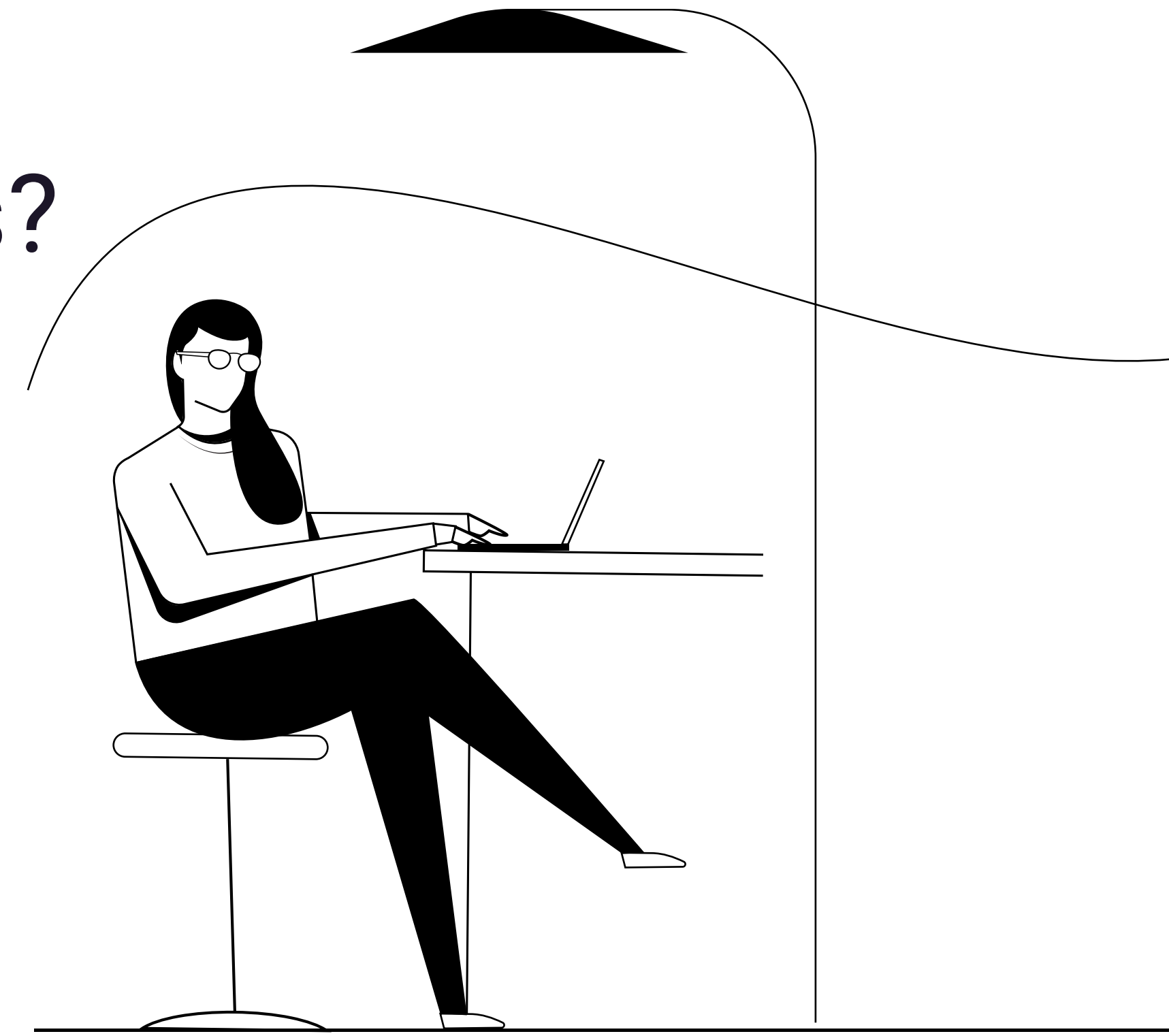
Goals

- **Financial Knowledge and Confidence:** To gain financial knowledge and confidence. She wants to educate herself about investment strategies, understand various financial concepts, and feel comfortable making informed decisions regarding her investments. Emma aims to stay updated with the latest trends and best practices in the financial world to build her knowledge base and increase her confidence in managing her finances effectively.

- **Building a Solid Investment Portfolio:** To build a solid investment portfolio. She seeks to diversify her investments across different asset classes, such as stocks, bonds, and potentially cryptocurrencies. Emma wants to create a well-balanced portfolio that maximizes potential returns while managing risk effectively. She aims to research investment opportunities, evaluate their potential, and make thoughtful decisions that contribute to the growth of her portfolio over time.

- **Leveraging Technology for Investment Success:** To leverage technology to enhance her investment journey. As a tech-savvy individual, she seeks to utilize web apps and digital tools that simplify the investment process, provide real-time information, and offer intuitive features. Emma wants to access robust investment platforms that offer tools for portfolio analysis, tracking performance, and monitoring market trends. She aims to leverage technology to make informed investment decisions, streamline her investment management, and stay connected to her financial goals.

Frustrations

- **Inadequate Investment Information:** Finds it frustrating when she encounters inadequate information about the investment products she is considering. She wants comprehensive and reliable information to make informed decisions, but the lack of clarity or detailed explanations can hinder her ability to evaluate investment options effectively.

- **Limited Fund Suggestions and Guidance:** Is frustrated by the lack of fund suggestions and guidance available to her as a newbie investor. She desires recommendations tailored to her risk tolerance and financial goals. Without proper guidance, she may feel overwhelmed or uncertain about which investment options are most suitable for her, hindering her ability to make confident investment decisions.

The Problem

How might we leverage AI technology to develop a user-friendly web application that automates stock trading, tailored specifically for DIY investors offering them a simplified and efficient solution for their investment needs?

Solution

AI Trader is a cutting-edge web application that leverages advanced sentiment analysis of news articles to accurately predict stock prices for your selected tickers. With its sophisticated system, it autonomously generates confident buy and sell decisions, enabling you to make informed investments effortlessly and automatically.

Source: 1

DEMO VIDEO

Login

Username *

Password *

LOGIN

Need an account?

≡ Dashboard

Portfolio Performance Chart

Equity

100,000.0
99,999.5
99,999.0
99,998.5
99,998.0
99,997.5
99,997.0
99,996.5
99,996.0
99,995.5

Current Balance

Cash Balance:
$99,120.28

Portfolio Balance:
$875.39

Total:
$99,995.67

Sun Jul 09 2023

Stocks in Your Portfolio

Company Ticker	Name	Quantity	Price of Purchase	Purchase Total	Current Price	Current Total	Difference
TLT	iShares 20 Year Treasury Bond ETF	2	$99.185	$198.37	$99.07	$198.14	▼ 0.12%
TSLA	Tesla, Inc. Common Stock	1	$277.47	$277.47	$274.44	$274.44	▼ 1.10%
VOO	Vanguard S&P 500 ETF	1	$403.5	$403.5	$402.81	$402.81	▼ 0.17%

Order History

Asset	Order	Quantity	Average Cost	Status
T	marketbuy2023-07-09T17:27:57.293904645Z	1	----	accepted
TLT	marketsell2023-07-08T22:47:30.029144958Z	1	----	accepted
TLT	marketsell2023-07-08T22:47:29.935105667Z	1	----	accepted
TSLA	marketsell2023-07-08T21:59:15.1903611719Z	1	----	accepted
TSLA	marketsell2023-07-07T19:03:23.864247Z	1	277.5	filled
TSLA	marketbuy2023-07-07T19:03:00.744311Z	1	277.47	filled
TSLA	marketsell2023-07-07T18:19:47.212288Z	1	278.97	filled
TSLA	marketbuy2023-07-07T18:18:10.402232Z	1	278.85	filled
TLT	marketbuy2023-07-07T14:33:10.447918Z	1	99.22	filled
TLT	marketbuy2023-07-07T14:09:39.020246Z	1	99.15	filled
TSLA	marketbuy2023-07-07T14:06:41.896537Z	1	277.98	filled
VOO	marketbuy2023-07-07T13:32:19.242571Z	1	403.5	filled

☰ Search

Search for a stock

Tels

Telstra Group Ltd

Telstra Group Ltd

Sotherly Hotels Inc

Sotherly Hotels Inc

Sotherly Hotels Inc

LuxUrban Hotels Inc

Sotherly Hotels Inc

City Lodge Hotels Ltd

Search Results Page:
Stock brief, historical performance & other details
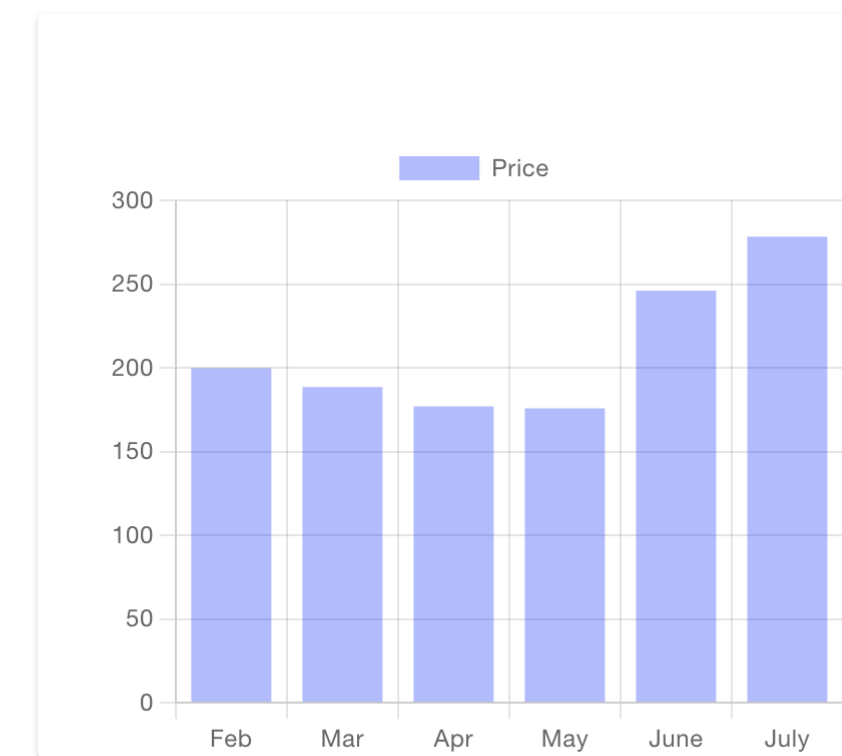
Search for a stock
Tesla Inc ▾

Tesla, Inc.

Tesla, Inc. designs, develops, manufactures, leases, and sells electric vehicles, and energy generation and storage systems in the United States, China, and internationally. It operates in two segments, Automotive, and Energy Generation and Storage. The Automotive segment offers electric vehicles, as well as sells automotive regulatory credits; and non-warranty after-sales vehicle, used vehicles, retail merchandise, and vehicle insurance services. This segment also provides sedans and sport utility vehicles through direct and used vehicle sales, a network of Tesla Superchargers, and in-app upgrades; purchase financing and leasing services; services for electric vehicles through its company-owned service locations and Tesla mobile service technicians; and vehicle limited warranties and extended service plans. The Energy Generation and Storage segment engages in the design, manufacture, installation, sale, and leasing of solar energy generation and energy storage products, and related services to residential, commercial, and industrial customers and utilities through its website, stores, and galleries, as well as through a network of channel partners; and provision of service and repairs to its energy product customers, including under warranty, as well as various financing options to its solar customers. The company was formerly known as Tesla Motors, Inc. and changed its name to Tesla, Inc. in February 2017. Tesla, Inc. was incorporated in 2003 and is headquartered in Austin, Texas.

Stock Symbol:	Current Price:	Exchange:
TSLA	274.43	NasdaqGS

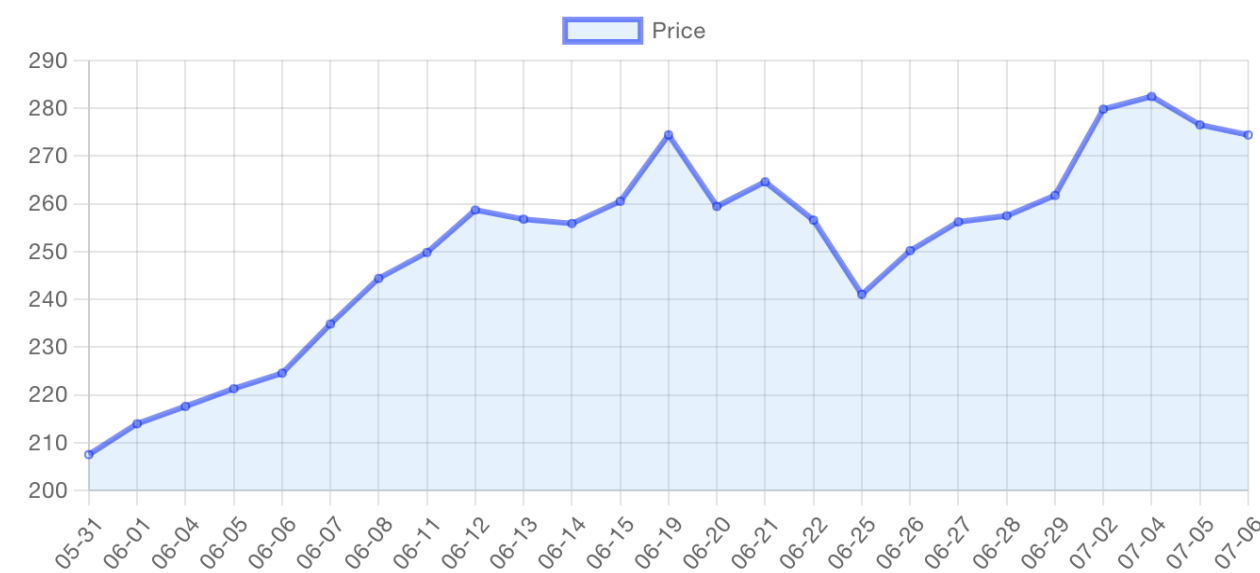| Opening:	High:	Low:	Closing:
$278.43	$280.78	$273.77	$274.43

Your Cash Balance:

$99120.28

You have sufficient funds to buy this stock.

OPEN PURCHASE SYSTEM

☰ Search

100

07-11 08-08 09-06 10-04 11-01 11-30 12-29 01-27 02-27 03-27 04-25 05-23 0

0

Feb   Mar   Apr   May   June   July

✕

Purchase Tesla, Inc. Stock

Opening:
$278.43

Closing:
$274.43

Stock Name
Tesla, Inc.

Market Price
Market Price

Price

Your Cash Balance:

$99120.28

Quantity *
1

Total = $0
Cash Balance after purchase: $99,120.28

You have sufficient funds to buy this stock.

OPEN PURCHASE SYSTEM

CONFIRM

-14 06-15 06-19 06-20 06-21 06-22 06-25 06-26 06-27 06-28 06-29 07-02 07-04 07-05 07-06

Strategies

Add a trading strategy for automated trading

AI FUND STRATEGY   COLLABORATIVE STRATEGY

AI Fund Strategy

Setup your AI fund strategy
Here you can setup your AI fund strategy:

Set up the parameters for your AI fund strategy here

CREATE THIS STRATEGY

Strategies

Add a trading strategy for automated trading

AI FUND STRATEGY   COLLABORATIVE STRATEGY

Collaborative strategy

Add a collaborative strategy

Here you can copy paste a strategy from Composer

Paste your strategy here

Give a name to your strategy

CREATE THIS STRATEGY

Market Opportunity

Retail investing in SOM (Serviceable Obtainable Market) has exceeded $500 billion, indicating significant participation from individual investors.

Additionally, the TAM (total addressable market) for alternative investing stands at an impressive $1.2 trillion, illustrating the substantial potential for growth and diversification in this sector. These figures underscore the increasing importance and attractiveness of retail and alternative investing in the current market landscape.

Source: Rise of ETPs by NASDAQ

Unique Value Proposition

AI Trader is your personal broker and investment advisor right in the palm of your hand.

Powered by Google's Vertex AI, it effortlessly curates your stock portfolio while allowing you to define the investment strategy - no finance professional required!
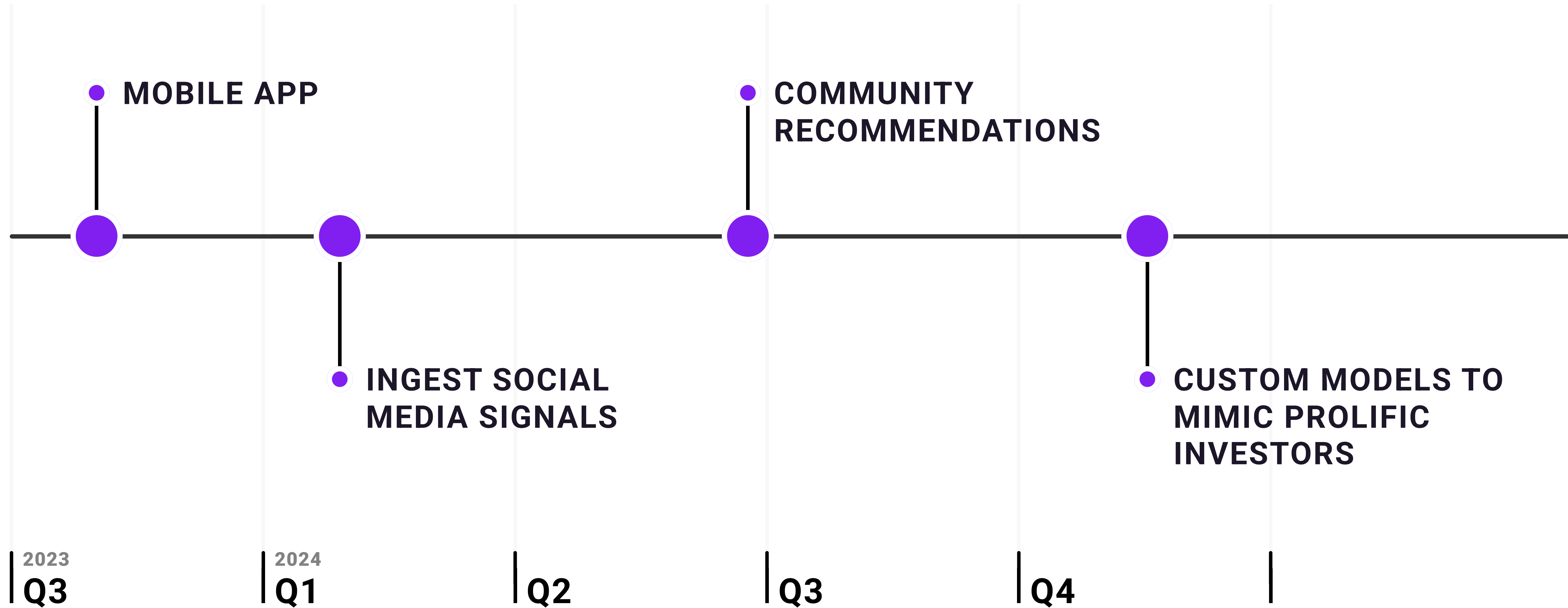
Revenue

Subscription revenue - automated trading based on strategy (targets Intermediate investor)

Freemium - Free credits to analyze the stocks and then buy credits to analyze more (targets beginner investors)
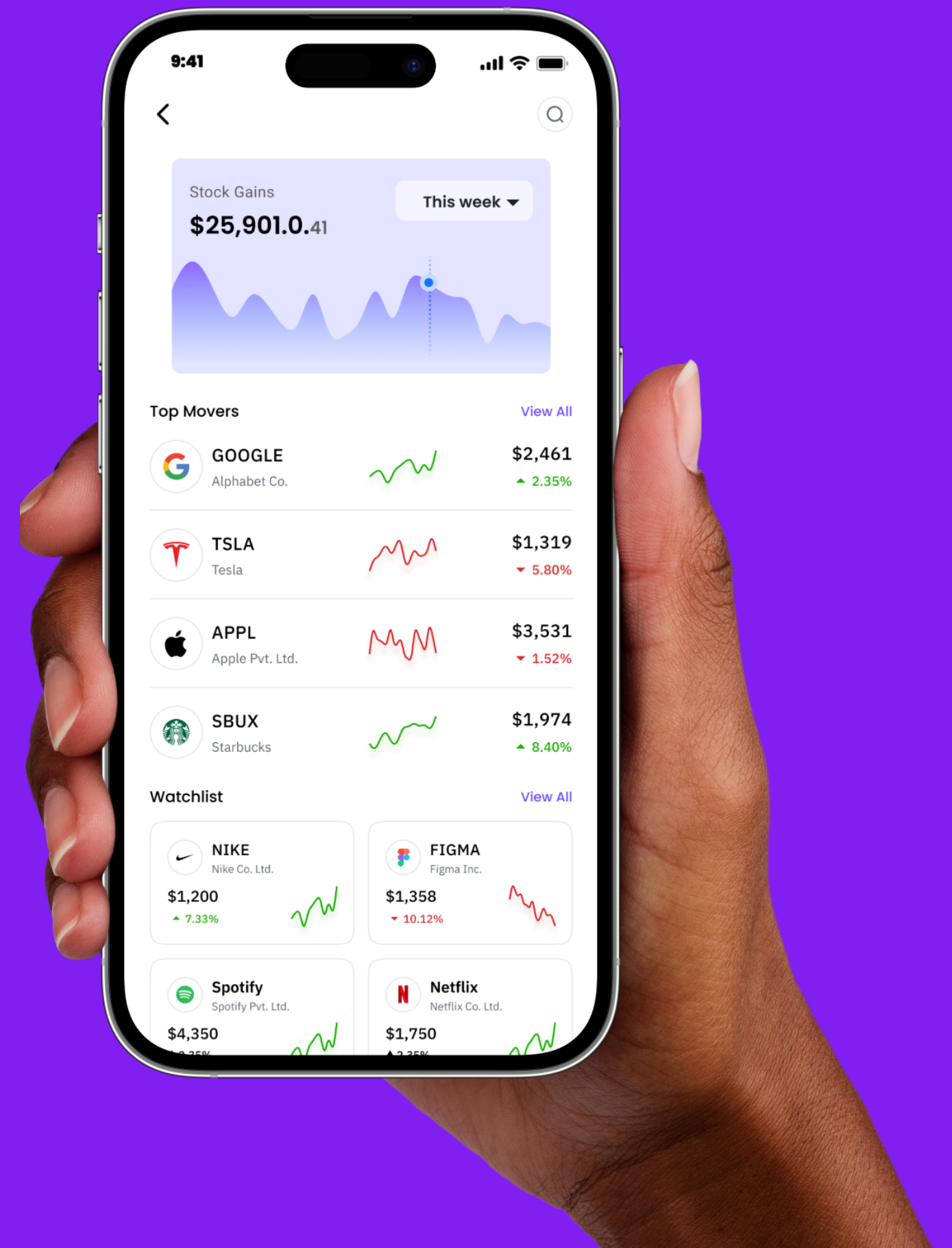
Future Road Map

MOBILE APP

COMMUNITY
RECOMMENDATIONS

INGEST SOCIAL
MEDIA SIGNALS

CUSTOM MODELS TO
MIMIC PROLIFIC
INVESTORS

2023
Q3

2024
Q1

Q2

Q3

Q4

AI TRADER

TEAM AI TRADERS

Meet the Team

Rodrigo Vargas

(rodrigo)

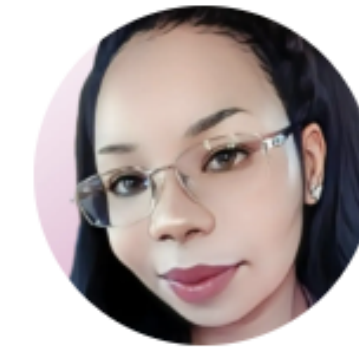Developer

KP Kshitij Parashar

(kp021)

Technical Product Manager

Vivien Richaud

(louvivien824)

Product Manager, Backend Developer

Jessi Jordan

(jessijordan)

Project Manager / UX Designer / Prompt Engineer

Ubaid Ur Rehman

(UBAID)

Student

Noman Tanveer

(noman_tanveer)

Research Associate

Thank you!

Questions? Thoughts? Comments?

Get in touch!

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vivien.richaud@gmail.com