Team Meeting

Week # 1
Date: 11/6/23
Time: 7:30 PM
Location: CKB Study Lounge

Meeting called by:	Saumya Dwivedi	**Type of meeting:**	Planning
Facilitator:	Meet Suhagiya	**Note taker:**	Jaysheel Patel
Timekeeper:	Dev Patel		
Attendees:	Meet Suhagiya, Dev Patel, Saumya Dwivedi, Jaysheel Patel		
Please read:	MediSys Corp.: The IntensCare Product Development Team		
Please bring:	Laptop		

Minutes

Week #1- Agenda item:	Case Study & Team Project Brainstorming	**Presenter:**	Saumya Dwivedi

Date: 11/6/23

Discussion:

We discussed what defines a team, the pillars of a successful team, and what causes teams to fail. We also discussed shortcomings of the IntensCare team and its members. We will utilize these to write our case study analysis. After this, we brainstormed app ideas for our group project. Some ideas we came up with were a trading app that lets you tweet stock picks/pitches and a chat-based AI model that is fed the latest financial news to aid investors in making informed decisions.

Conclusions:

Each person will complete their respective part of the case study. We will continue to brainstorm and settle on an idea soon, so that we can begin in-depth research on strategy, innovation, and target market disruption as well as develop our presentation. For now, each team member will be tasked with researching one of the ideas we brainstormed, so we can make an educated decision on what to pursue.

Action items	Person responsible	Deadline
✔ Complete Case Study Analysis	All	11/6/23
✔ Research Assigned App Idea	All	11/13/23
✔ Finalize App Ideas & Begin In Depth Research	All	11/13/23

Other Information

Resources:

https://drive.google.com/file/d/1Wk-FOqyCxl_p717oOFNPwhNkKNNff6Vi/view

Special notes: N/A

Team Meeting

Week # 2
Date: 11/7/23
Time: 4:20 PM
Location: CKB 313

Meeting called by:	Dev Patel	**Type of meeting:**	Brainstorming
Facilitator:	Jaysheel Patel	**Note taker:**	Saumya Dwivedi
Timekeeper:	Meet Suhagiya		

Attendees:	Meet Suhagiya, Dev Patel, Saumya Dwivedi, Jaysheel Patel
Please read:	https://www.linkedin.com/advice/0/what-social-implications-using-ai-finance-br5kf
Please bring:	Laptop

Minutes

Week #2- Agenda item:	Deciding on final topic to present and outlining of presentation.	**Presenter:**	Dev Patel

Date: 11/07/23

Discussion: Talked about Open AI's new GPT platform where you can build language models. Build a GPT model that evaluates financial investment decisions and provides recommendations based off of latest finance news. Can post trades to friends and family. Discussed about different functionalities to build into the app. Cross between trading platforms built by AI and social updates.

Conclusions: Assign tasks to each member to begin research about the AI language models and think of different functions needed to create an engaging app.

Action items	Person responsible	Deadline
✔ Which trading platform to partner with	All	11/10/23
✔ Brainstorm functionalities	All	11/14/23
✔ Use of AI	All	11/14/23

Other Information

Resources:

https://fastercapital.com/content/The-Top-Social-Finance-Startups-You-Need-to-Know-About.html

Special notes:

Decided on final IDEA!

Team Meeting

Week # 3
Date: 11/20/2023
Time: 6:00 P.M
Location: NJIT Library

Meeting called by:	Meet Suhagiya	**Type of meeting:**	Research
Facilitator:	Saumya Dwivedi	**Note taker:**	Dev Patel
Timekeeper:	Jaysheel Patel		
Attendees:	Meet Suhagiya, Dev Patel, Saumya Dwivedi, Jaysheel Patel		
Please read:	N/A		
Please bring:	Laptop		

Minutes

Week #3- Agenda item:	Research application concept and design and put together initial information for the slideshow.	**Presenter:**	Meet Suhagiya

Date: 11/20/2023

Discussion: In today's meeting, we discussed the different language models that can be used for a finance/social app. We found an API/chatbot that is fluent in all things finance which would be able to provide a good analysis on stock portfolios. Furthermore, we researched some of the best features that make stock trading apps successful so that we can implement them in our app. One of those features is real time analytics which is where we would implement an AI chatbot to provide analytics and recommendations.

Conclusions: Have each member pick specific features for the app to research in further details and create a slideshow that entails everything.

Action items	Person responsible	Deadline
✔ Research brokerage app-specific features	All	11/28/2023
✔ Prepare slideshow	All	11/30/2023
✔ N/A	N/A	N/A

Other Information

Resources:

https://hub.jhu.edu/2023/05/31/ai-chatbot-speaks-finance/

https://decode.agency/article/stock-market-app-features/

https://wealthup.com/best-portfolio-analysis-tools/

Special notes:

Enter any special notes here.

Team Meeting

Week # 4
Date:
Time:
Location:

Meeting called by: **Type of meeting:**

Facilitator: **Note taker:**

Timekeeper:

Attendees:

Please read: Enter reading list here

Please bring: Enter items to bring here

Minutes

Week #4-   Enter agenda item here   **Presenter:**   Enter presenter here
Agenda item:

Date:

Discussion:

Conclusions:

Action items	Person responsible	Deadline
✔ Enter action items here	Enter person responsible here	Enter deadline here
✔ Enter action items here	Enter person responsible here	Enter deadline here
✔ Enter action items here	Enter person responsible here	Enter deadline here

Other Information

Resources:

Enter resources here.

Special notes:

Enter any special notes here: