Aequitas AI assignment:  
  
Link to the dashboard: [Dashboard](https://researchdashboard-mpdyzecyxdvj3q53ollbel.streamlit.app/)

If the above link does not work, here is the github link to the complete dashboard: <https://github.com/MihirWani/Research_Dashboard>

**Thought Process:**

The data provided in the excel sheets was not very well formatted. I used Airbase to format the data into a more efficient structure.

To compare the 2 analyst’s notes I used Machine Learning Techniques (Sentence transformer and cosine similarity)

Then I created an AI enable dashboard using Streamlit which uses python to host a website.

**Tools & Stack**

Used **Streamlit** for dashboard (clean, responsive, Python-native)  
Used **pandas** for CSV handling, **sentence-transformers** for clustering  
Data from two analysts was cleaned, deduplicated, and grouped into “clusters” using Airtable

**Design Thinking**

Sidebar filters and search make it easy to navigate the day's notes  
Grouped similar insights under shared topics (Cluster ID)  
Preserved analyst-specific content for side-by-side decision-making

**Automation:**

This process can be easily automated using API and other tools. Machine learning models or Large Language models can also be integrated as streamlit uses python.

**Efficiency & Impact**

Saves fund managers time by removing duplicate reading  
Combines insights under themes without losing individual voice

**Bonus Efficiency Ideas:**  
  
Summaries can be extracted using LLM  
Sentiment analysis can be done and a time series data can be displayed

Appendix: <https://airtable.com/appcUbhXTdenX6hZv/tblL92WajKsczwJY4/viwtJMjoZeJ7OfSZy?blocks=hide>

https://airtable.com/appcUbhXTdenX6hZv/tbl6qqu6xtSivfnRT/viwYVBQdskzpyaBmO?blocks=hide