Citibank Hackathon

Presented By: CodeMonkey

Members:

Wei Hang
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Shaun
Xin Yi
Ryan Taw

Agenda

1. Problem Statement
2. Product Design
3. Framework & Implementation
4. Further Improvements & Conclusion
5. Product Demonstration

Problem Statement

Design an application for both clients and bankers that positions Citi as the modern bank for wealth management solutions, to drive client acquisition and strengthen client relationships in the Asian market.

Problem Statement Breakdown

Wealth management solution

Advisory service to address the needs of investors

Drive client acquisition and strengthen client relationships

Establish trust and acknowledgement with current/potential investors

Investing is difficult for inexperienced investors who want to grow their portfolio

The Inexperienced Investor Dilemma

There are so many investment plans!

Which one is the best for me?

I should just keep my money in the bank for now...

Our Idea

Guide inexperienced investors on what to invest based on similar existing investing portfolios

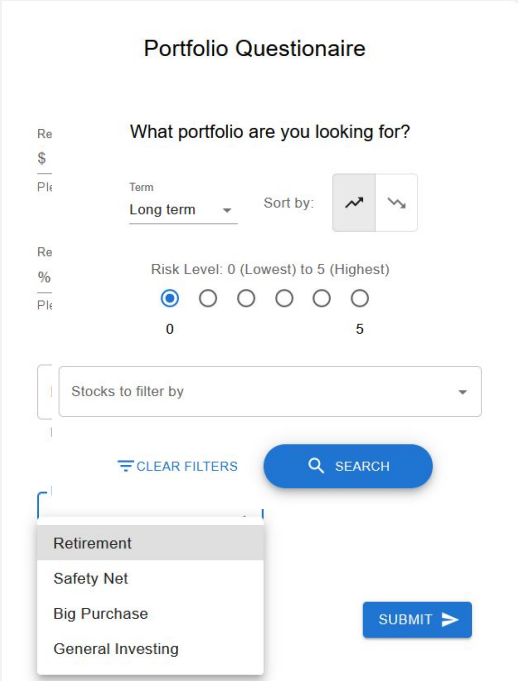
Educate them on the power of gradual investments with savings

Product Design

Business concept

HIGHLY-CUSTOMISABLE SOLUTION

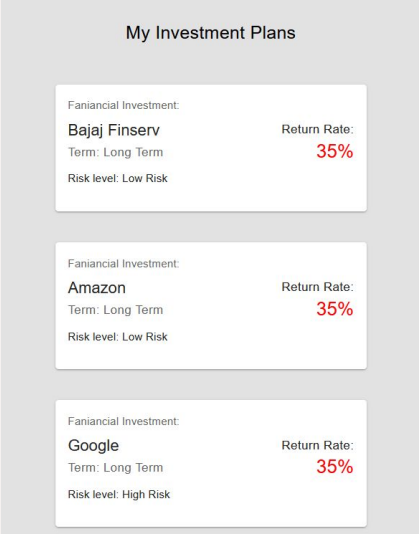
- Customize the goal based on user's needs and requirement
- Filter the most suitable investment plans based on different features

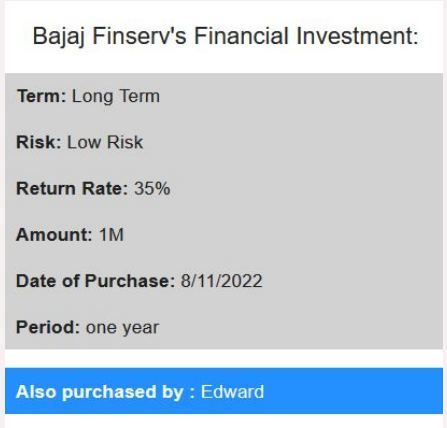


Business concept

Long-term Record

- Easy access to current investment themes
- Trace the progress

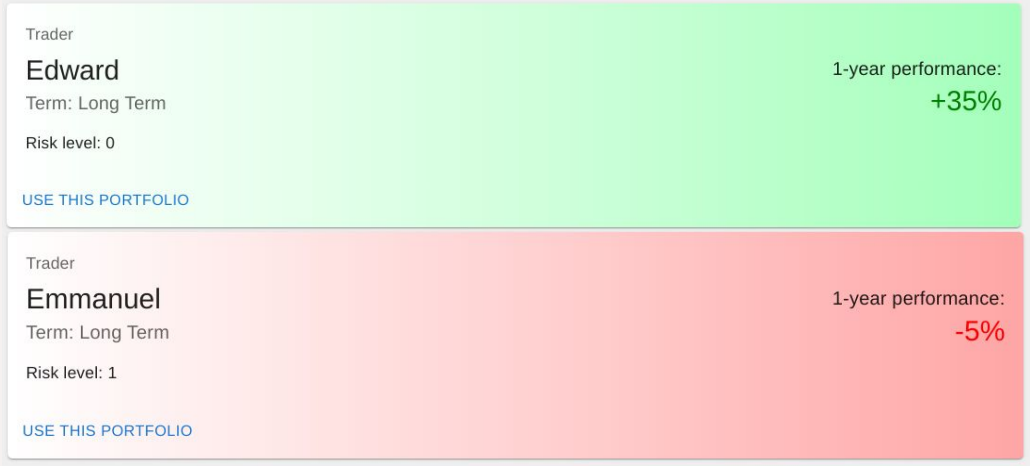




Business concept

Investors Society

- View other investors' plans and their performance
- Real-world example from investors with similar preference and background
- Learn from practice, learn from others



Business concept

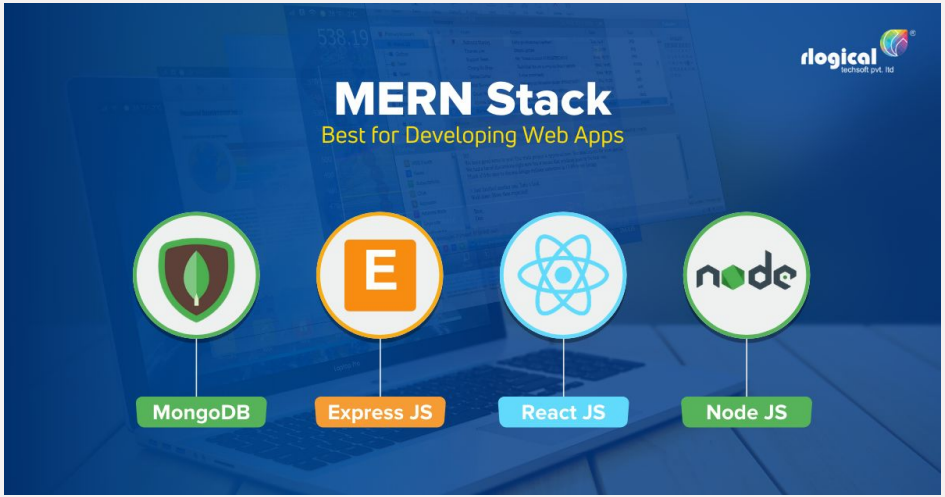
Inspire & Empower

- Uncover their potential through algorithms
- Adjustable future plans provide insights for various situations, an analyst dedicated to your account

Framework & Implementation

Framework used

- MERN stack
- Skilled in javascript
- Allow us to develop a dynamic website quickly



Why Mongo?

Our data can be represented in simple JSON easily, making MongoDB the ideal choice

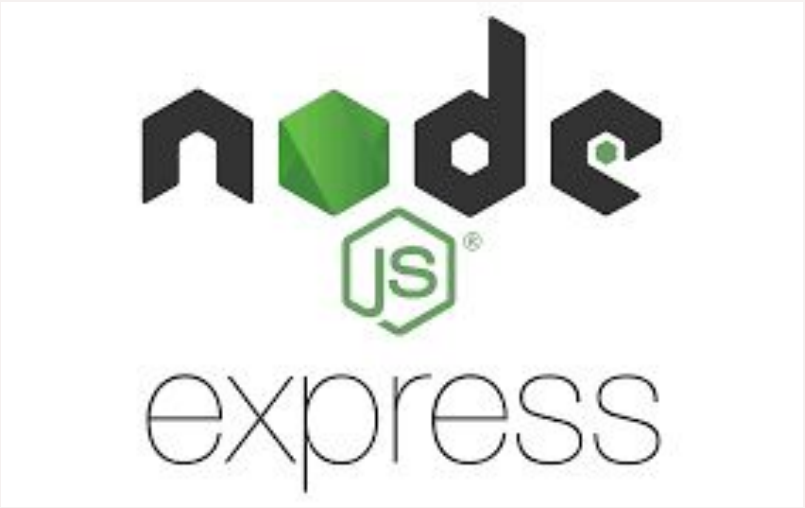
```
{ name: "Edward", term: "Long Term", risk: 0, returnrate: 35 },
{ name: "Norton ", term: "Long Term", risk: 0, returnrate: 30 },
{ name: "Han Solor", term: "Long Term", risk: 1, returnrate: 5 },
{ name: "Emmanuel", term: "Long Term", risk: 1, returnrate: -5 },
{ name: "Joy", term: "Long Term", risk: 2, returnrate: -15 },
{ name: "Bruce Wayne", term: "Long Term", risk: 2, returnrate: -25 },
{ name: "Solo", term: "Medium Term", risk: 4, returnrate: -35 },
{ name: "Shin", term: "Medium Term", risk: 2, returnrate: -10 },
{ name: "Harold", term: "Medium Term", risk: 1, returnrate: 5 },
{ name: "Greg", term: "Short Term", risk: 3, returnrate: -5 },
{ name: "Natalie H.", term: "Short Term", risk: 2, returnrate: 5 },
{ name: "Natalie V.", term: "Short Term", risk: 1, returnrate: 10 },
```

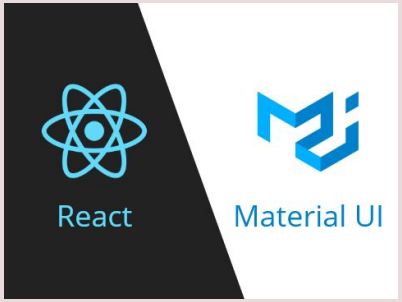
Express

Minimalistic Framework

Simple to learn and apply

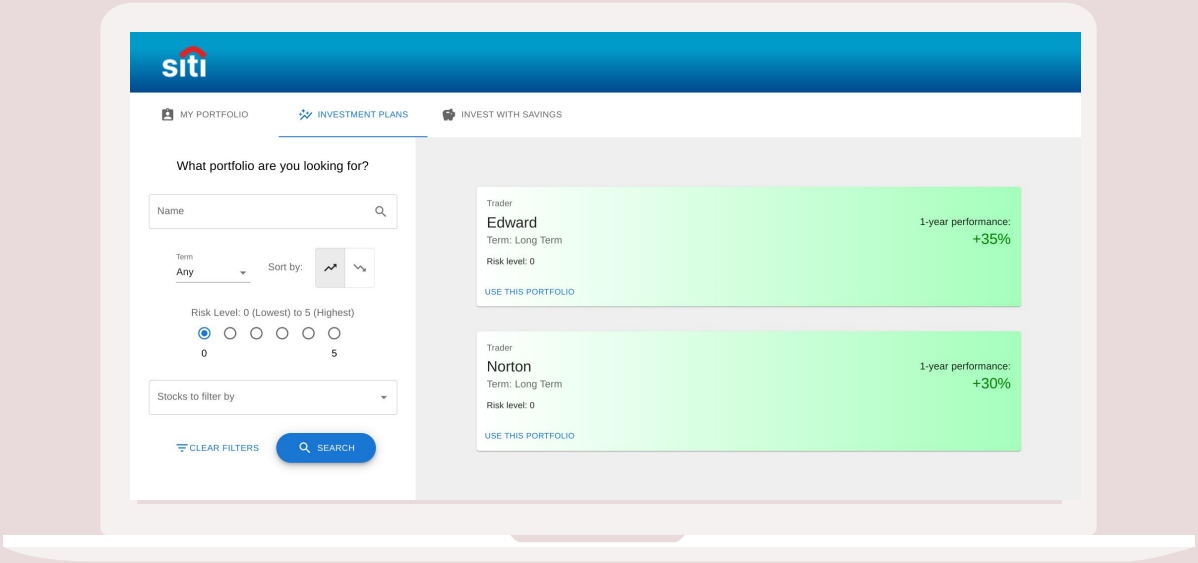
Quick development



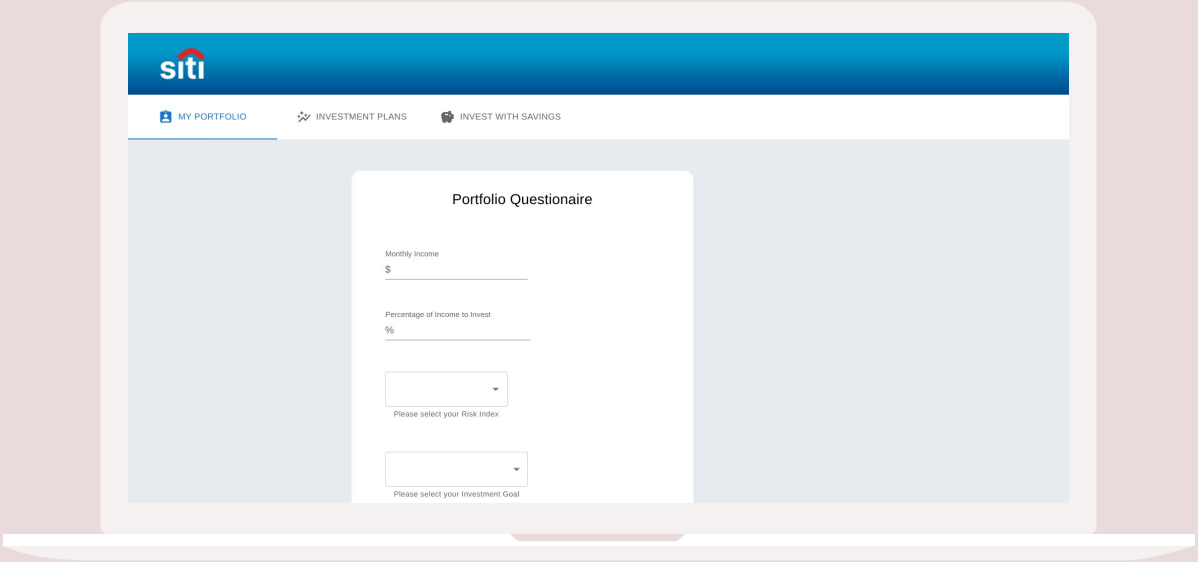


React

And Material UI library allowed us to quickly develop a simple and sleek UI with pre-built components



Lets us create a shared store between pages that can easily accessed



Further Improvements & Conclusion

Review for problem statement, project structure. Stating future improvements.

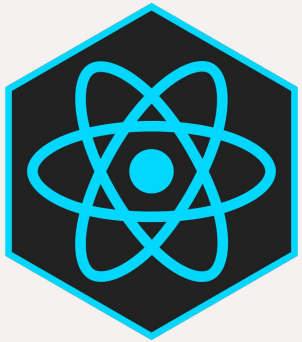
Review of Problem Statement

- Lack of investment portfolios information.
- Some clients are inexperienced in investing find it difficult to grow their portfolio.
- Sales require filtered information which caters to clients' preferences.
- Lacking intuitive demonstration for portfolio's growth.

Web Application for clients & bankers to have a intuitive understanding of popular portfolios that cater to their preferences.

Review of Product Structure

Frontend React+Redux



Backend Spring Boot

Integration Service

Future Improvements

- Use **recommendation system** to provide more portfolios which might cater to the clients' preferences.
- Involve single stock / bond / commodity / cash / cash equivalent **performance information datagrid** for clients to compare and choose.
- Add **follow** / **like function** for portfolios, easier to demonstrate popular portfolios.
- Integrate with **Amazon Simple Email Service**. Send notification to users for their invested portfolios and those they might be interested.

Conclusion

Our Product helps clients and bankers to navigate their potential investing portfolios based on their preferences.

Product Demonstration

Thank you for listening!

Any Questions?

Presented By: CodeMoney