



Citibank Hackathon

Presented By: CodeMonkey

Members:

Wei Hang

Ji Han

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.

A large white number 1 is centered on the right side of the slide. It is overlaid on a photograph of dried reeds or grasses against a light beige background. The number 1 is the first item in a list, indicating the first problem statement.

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

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*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



2

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

Portfolio Questionnaire

What portfolio are you looking for?

Re \$
Plk

Term
Long term

Sort by:  

Re %
Plk

Risk Level: 0 (Lowest) to 5 (Highest)

☒ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Stocks to filter by

[CLEAR FILTERS](#) [SEARCH](#)

Retirement
Safety Net
Big Purchase
General Investing

[SUBMIT >](#)

Business concept



Long-term Record

- Easy access to current investment themes
- Trace the progress

My Investment Plans	
Financial Investment: Bajaj Finserv Term: Long Term Risk level: Low Risk	Return Rate: 35%
Financial Investment: Amazon Term: Long Term Risk level: Low Risk	Return Rate: 35%
Financial Investment: Google Term: Long Term Risk level: High Risk	Return Rate: 35%

Bajaj Finserv's Financial Investment:

Term: Long Term

Risk: Low Risk

Return Rate: 35%

Amount: 1M

Date of Purchase: 8/11/2022

Period: one year

Also purchased by : Edward

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

Trader

Edward

Term: Long Term

Risk level: 0

1-year performance:
+35%

[USE THIS PORTFOLIO](#)

Trader

Emmanuel

Term: Long Term

Risk level: 1

1-year performance:
-5%

[USE THIS PORTFOLIO](#)

Business concept



Inspire & Empower

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



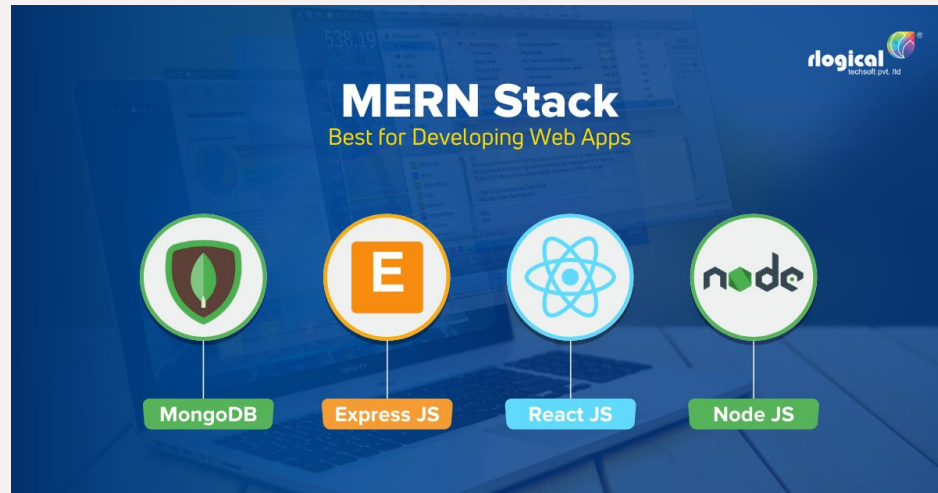
Framework & Implementation



3

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

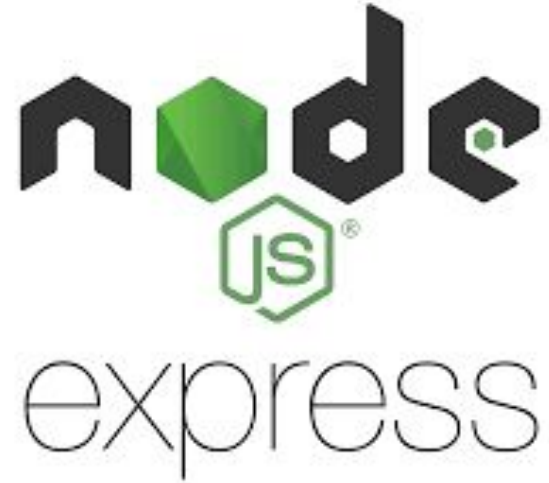
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{ name: "Emmanuel", term: "Long Term", risk: 1, returnrate: -5 },  
{ name: "Joy", term: "Long Term", risk: 2, returnrate: -15 },  
{ name: "Bruce Wayne", term: "Long Term", risk: 2, returnrate: -25 },  
{ name: "Solo", term: "Medium Term", risk: 4, 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 },
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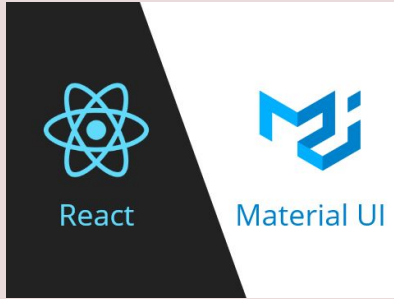
Express

Minimalistic Framework

Simple to learn and apply

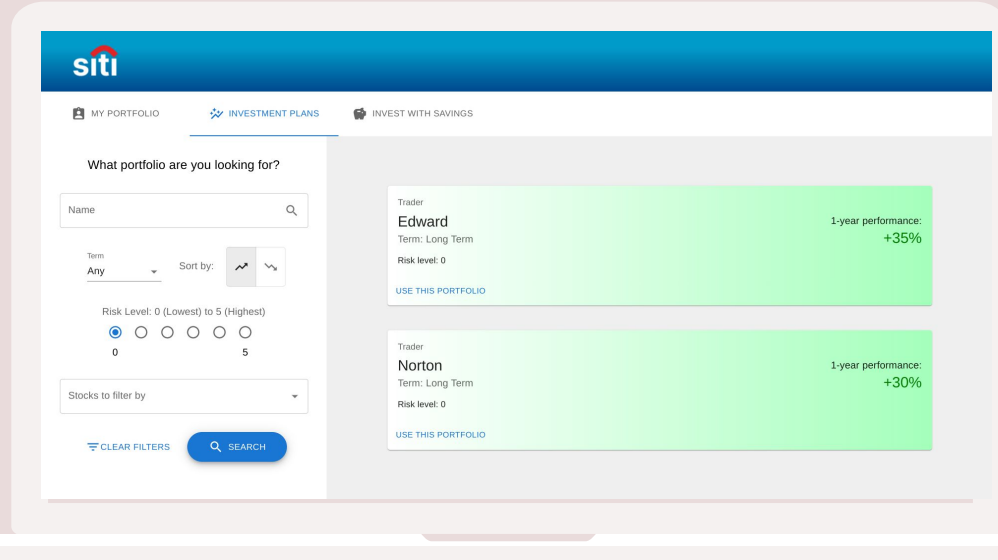
Quick development





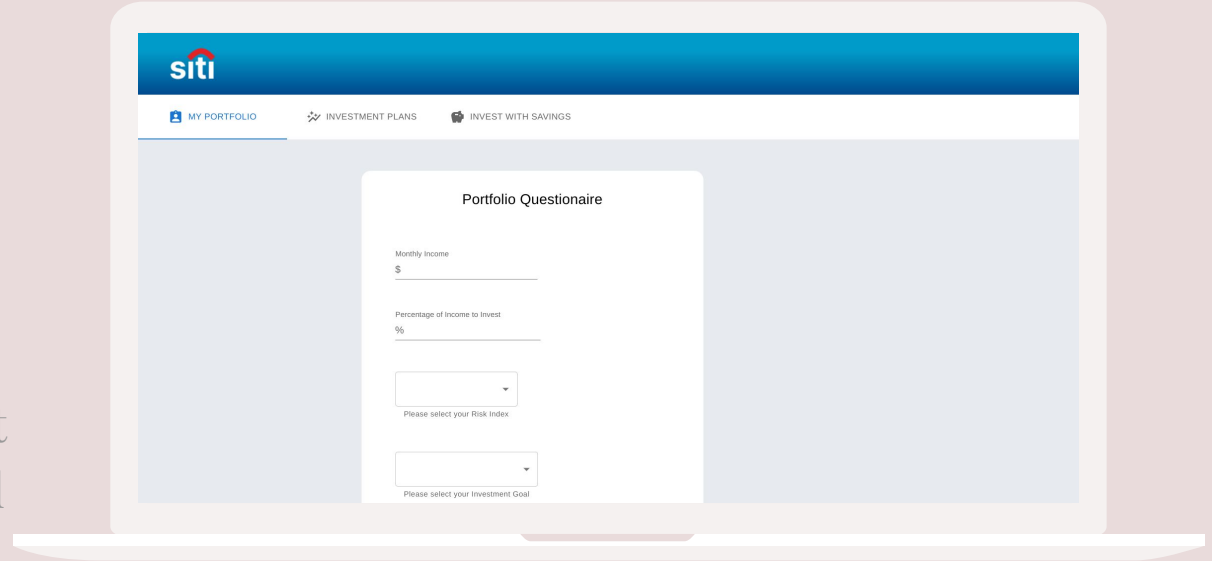
React

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.

A large white number 4 is centered over a rectangular image. The image shows several dried, golden-brown reeds or grasses against a soft, out-of-focus background. The entire slide has a light beige background with a darker beige horizontal band across the middle.

Review of Problem Statement

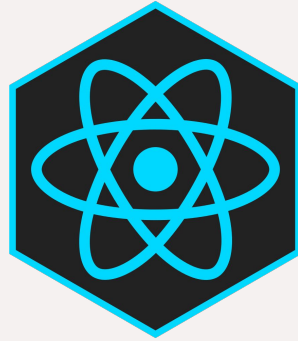
- Lack of investment portfolios information.
- Some clients are inexperienced in investing find it difficult to grow their portfolio.
- Sales require filtered information which caters to clients' preferences.
- Lacking intuitive demonstration for portfolio's growth.



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



amazon
web services™

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

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

Product Demonstration

A decorative image on the right side of the slide. It features a large, white, serif number '5' centered over a photograph of several tall, dried reeds or grasses. The background of the image is a soft, muted brown. The entire slide has a light beige background with a white rectangular area in the bottom right corner.

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Thank you for listening!

Any Questions?



Presented By: CodeMoney