

Hi! I Am Ramesh

Product & Analytics

- Studied Computer Science and Engineering Graduate
- Skill in Both Product and Analytics
- Run an YouTube Channel Focused on Ai and Tech Education
- Contribution to cal.com Company ARR of \$10M Doller

Ramesh k

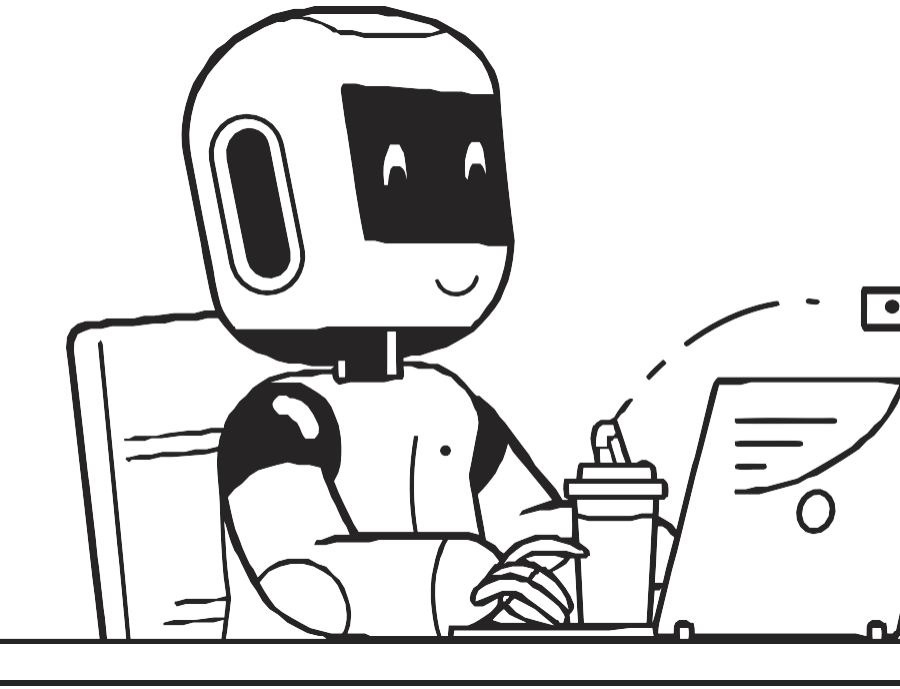
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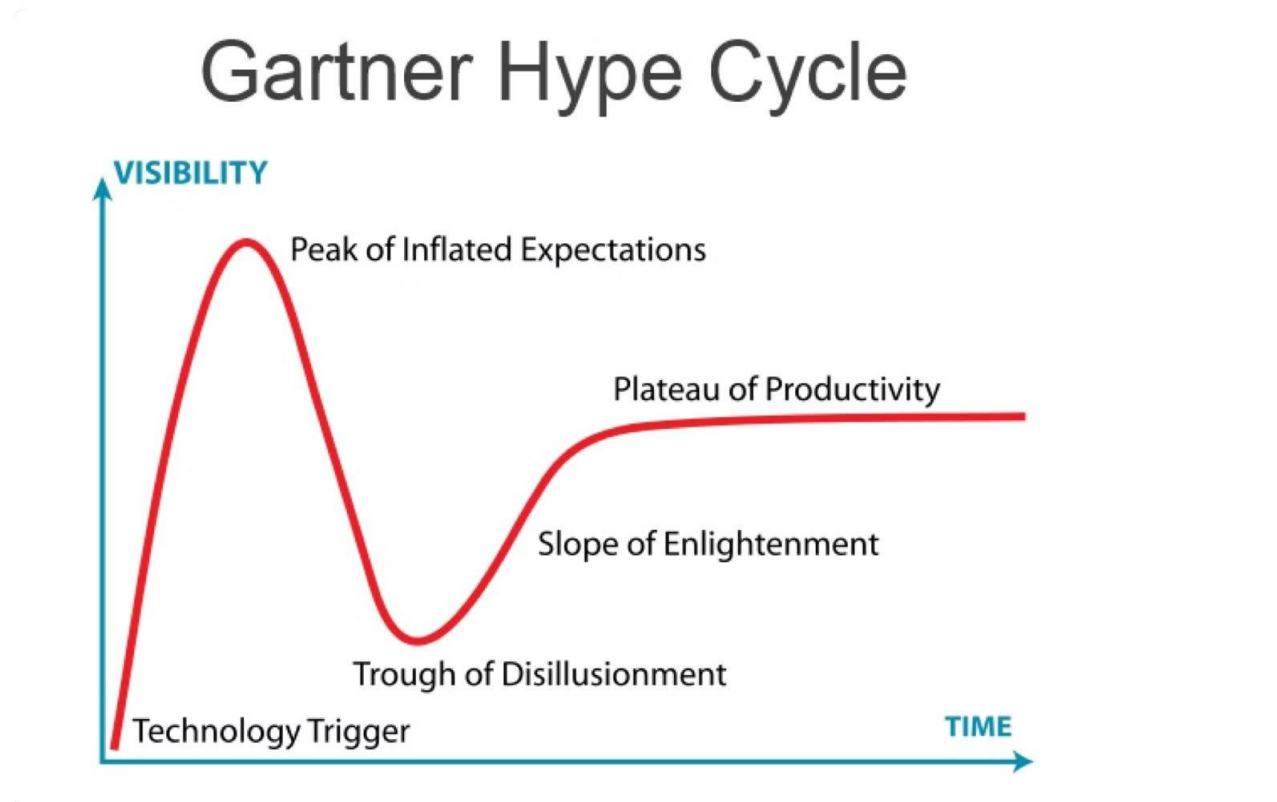


Building Financial Agents

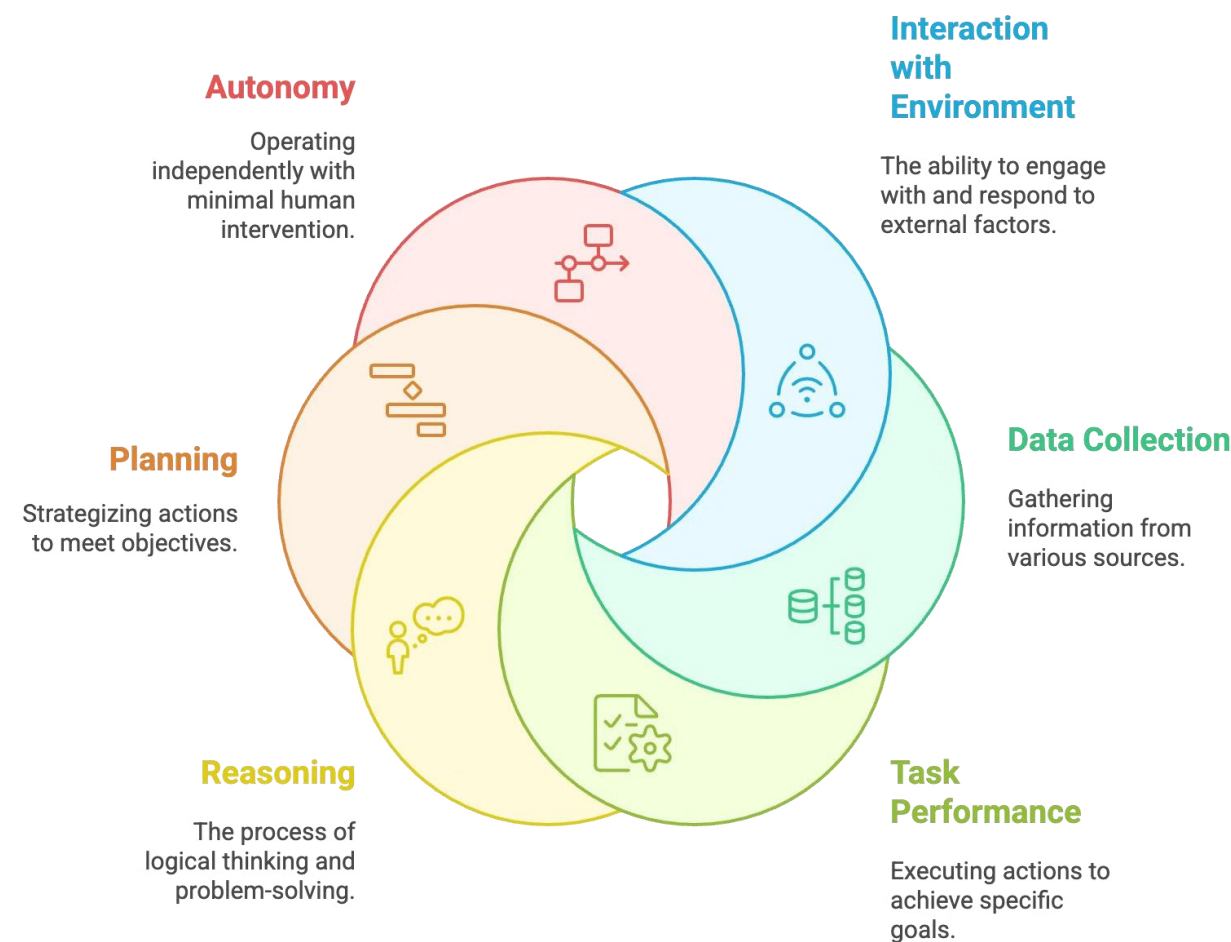
This session explores:

1. Setting Context: AI Agents vs Agentic AI
2. Applications in Financial Services
3. Code-along: Building a Financial AI Agent
4. Evaluation Frameworks

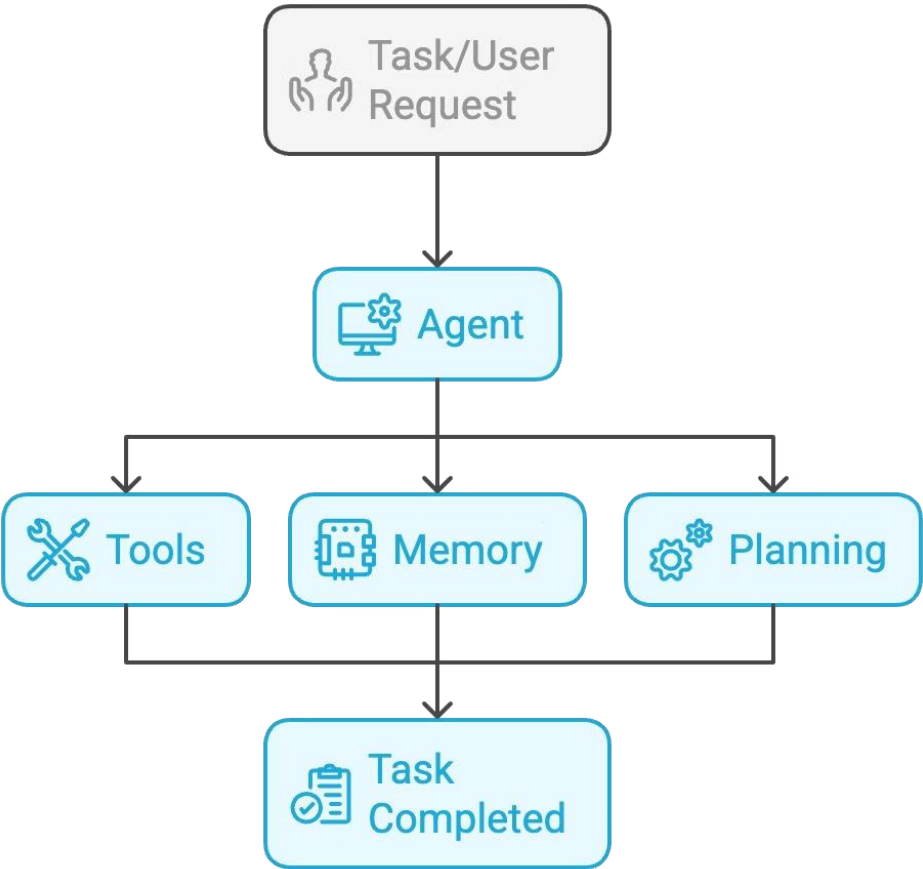
Agentic AI hype cycle: What stage are we in?



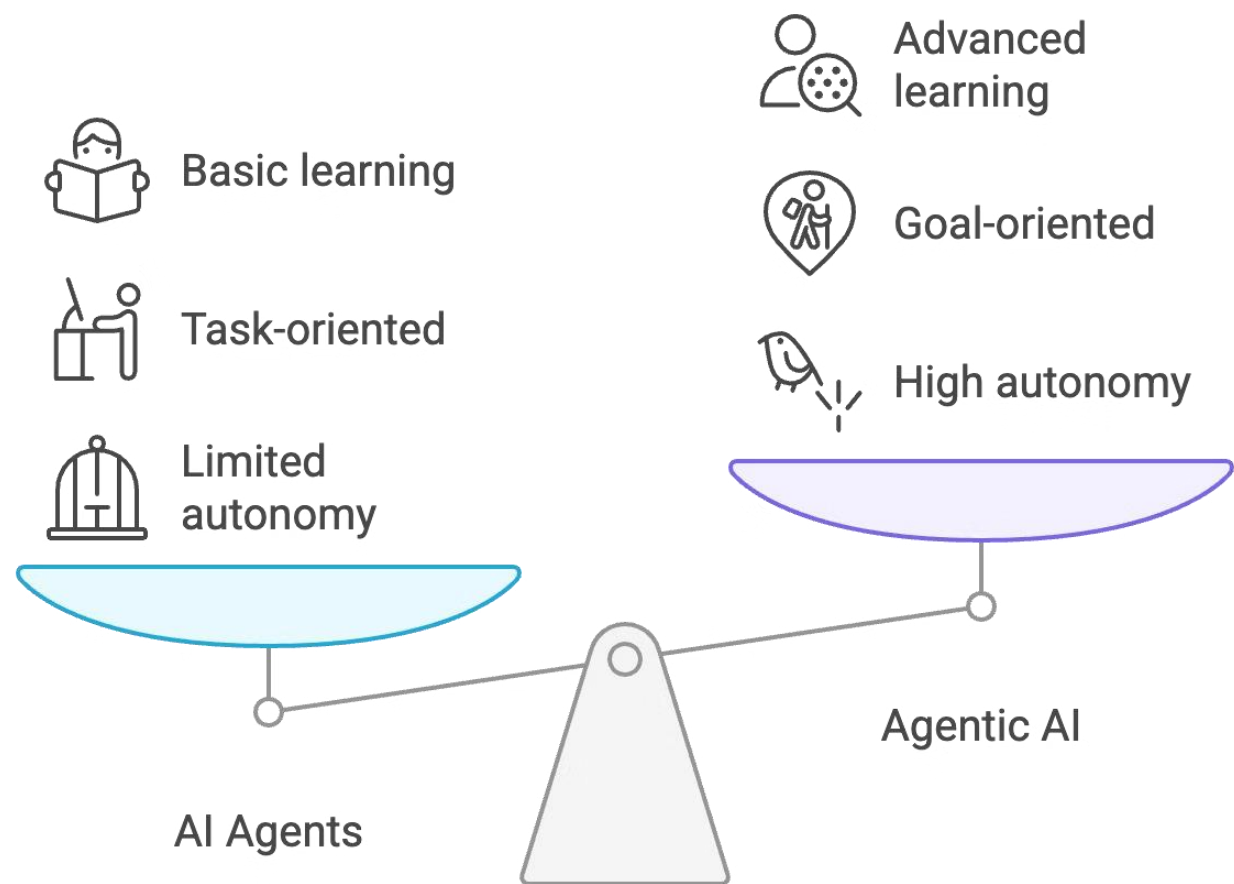
Understanding AI Agents



AI Agents Components



AI Agents vs Agentic AI

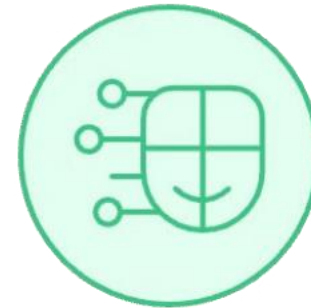


Choose the best AI Approach for your needs: *Problem-First* rather than *Fancy-Tech-First*



AI Agents

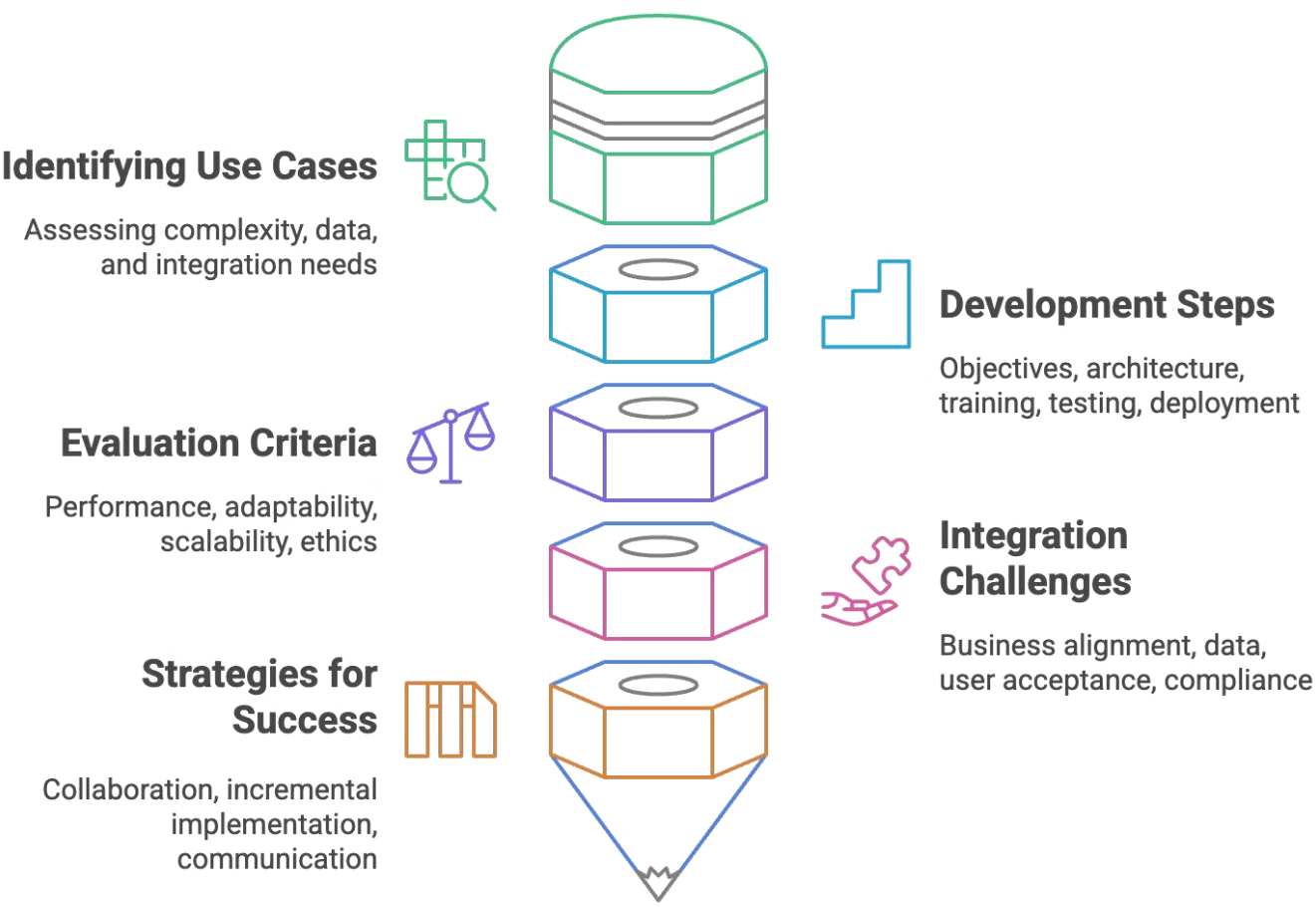
Focus on task-specific,
isolated operations



Agentic AI

Emphasize networked,
collective intelligence

AI Agents - How to start thinking about them?



Applications in Financial Services



Streamlining Operations

AI agents can automate repetitive tasks, improving efficiency.

Customer Engagement

Adaptive robo-advisors offer tailored financial advice, improving customer satisfaction.

Risk Management

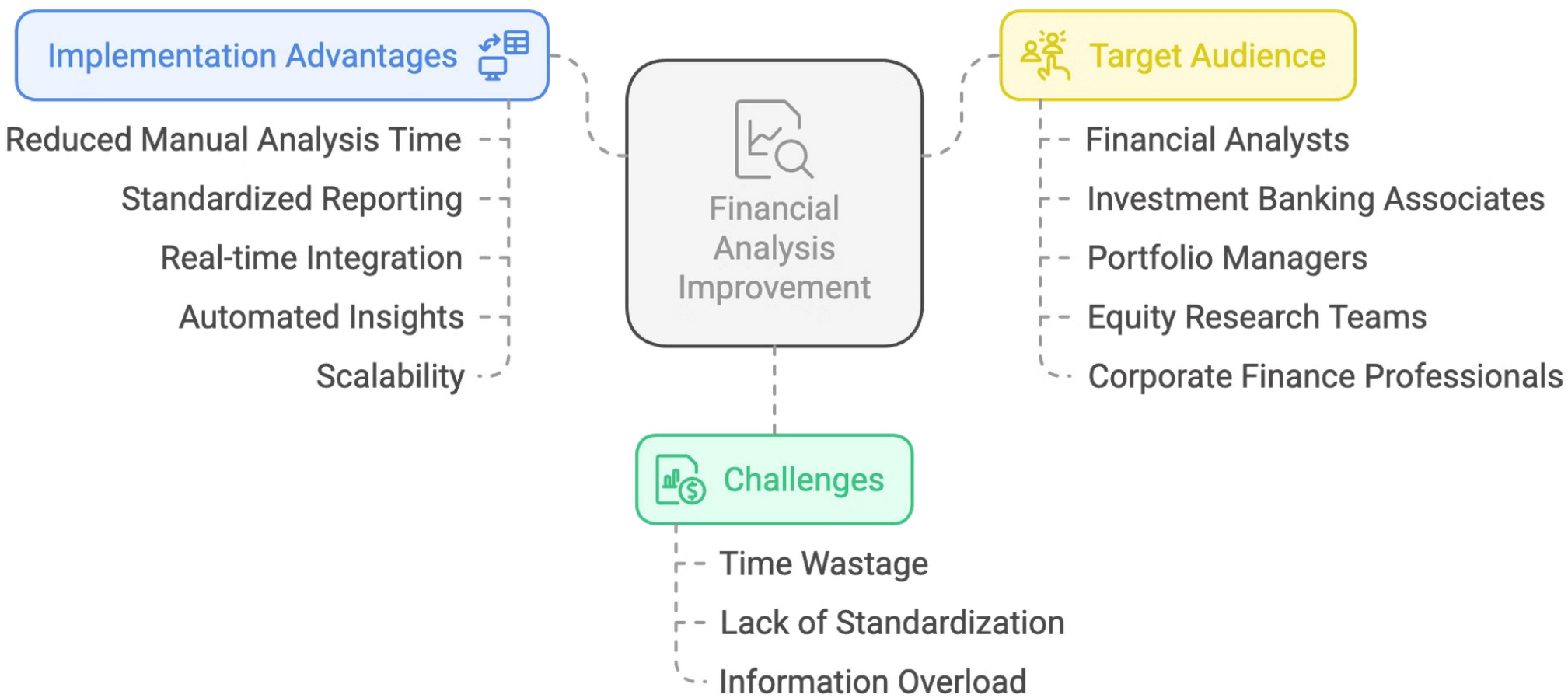
Provides real-time credit scoring, offering up-to-date evaluations.

Automated Trading

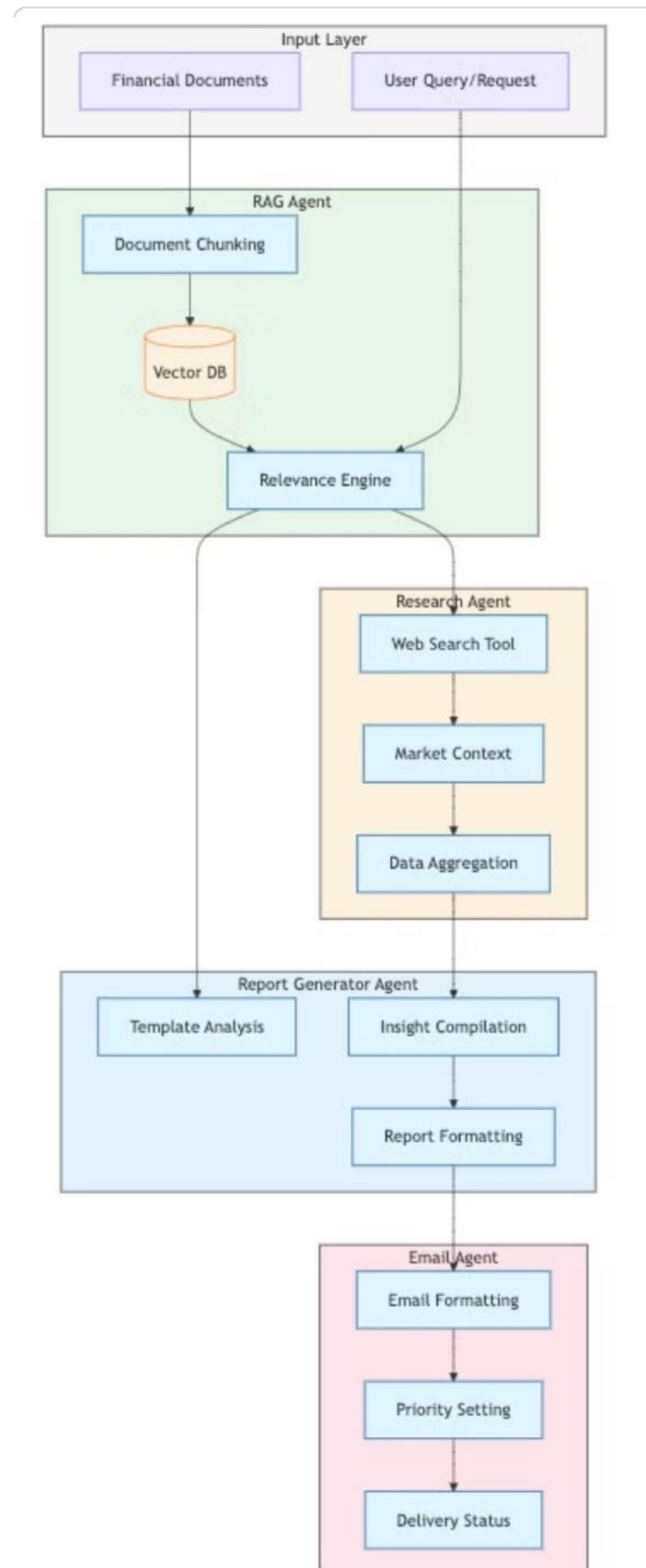
Agentic AI utilizes advanced algorithms to execute trades at high speeds, capitalizing on market opportunities.

Today's Use-Case:

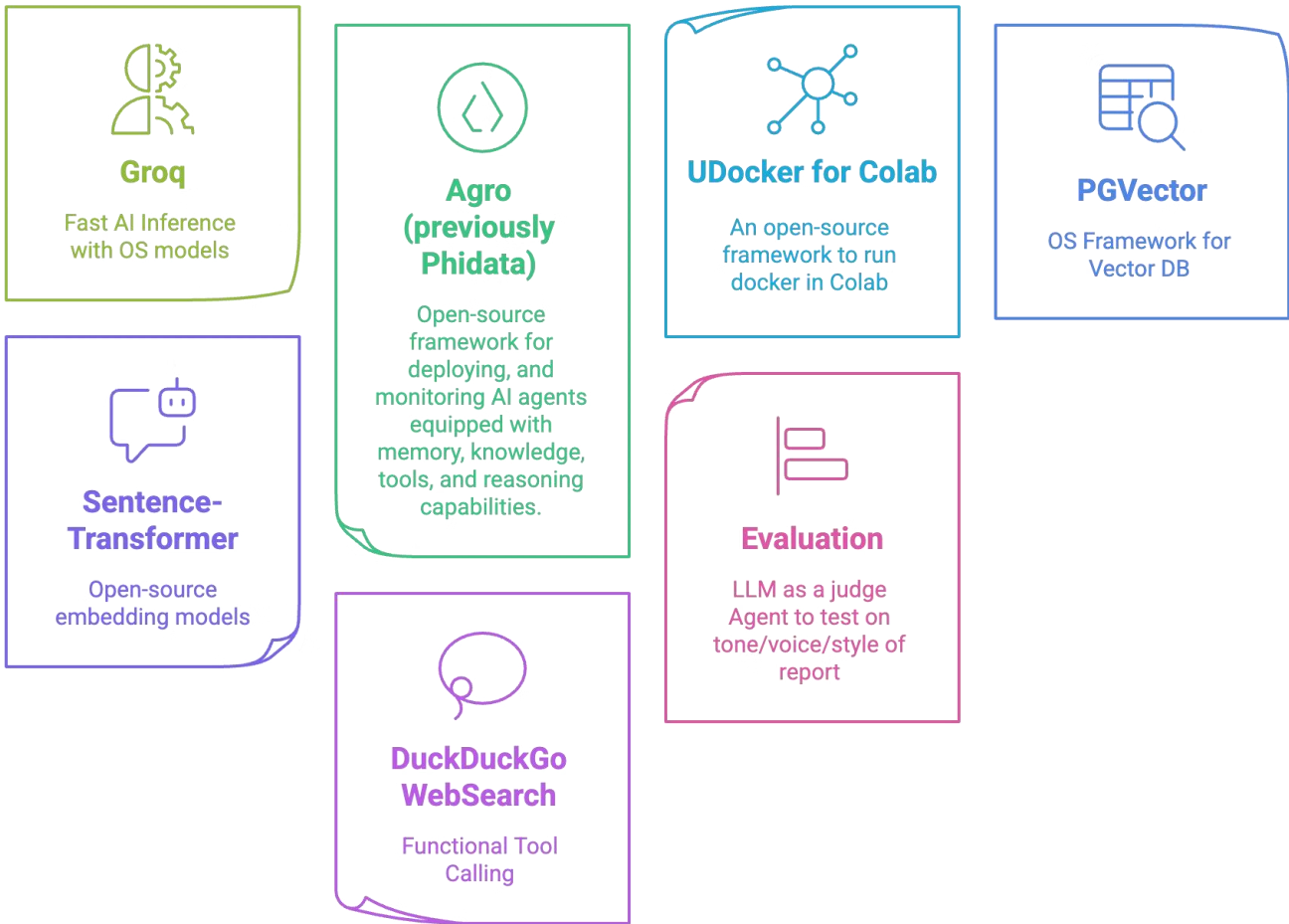
Enhancing Financial Analysis: Challenges and Solutions



Financial Analysis Report Generator Agent Workflow



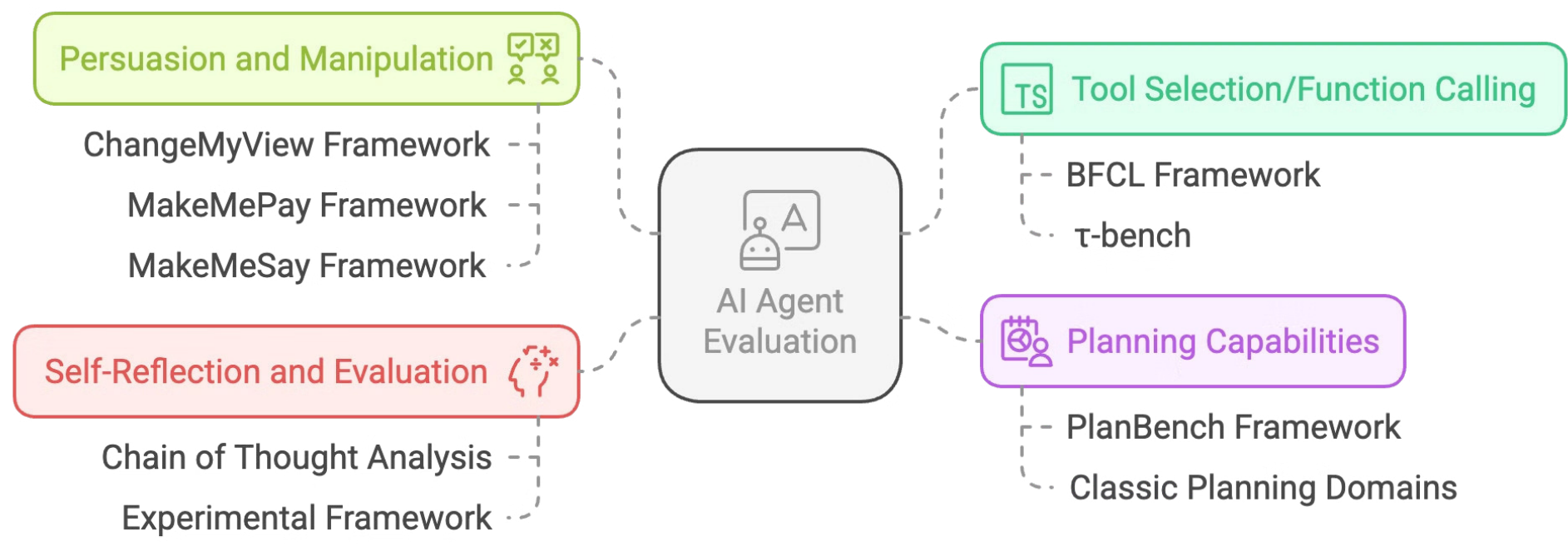
AI Agent - Open Source Solution Framework





Let's Start Coding!

Evaluation: A MUST HAVE FRAMEWORK



Example of Self-Reflection

Paper: [Self-Reflection in LLM Agents: Effects on Problem-Solving Performance](#)

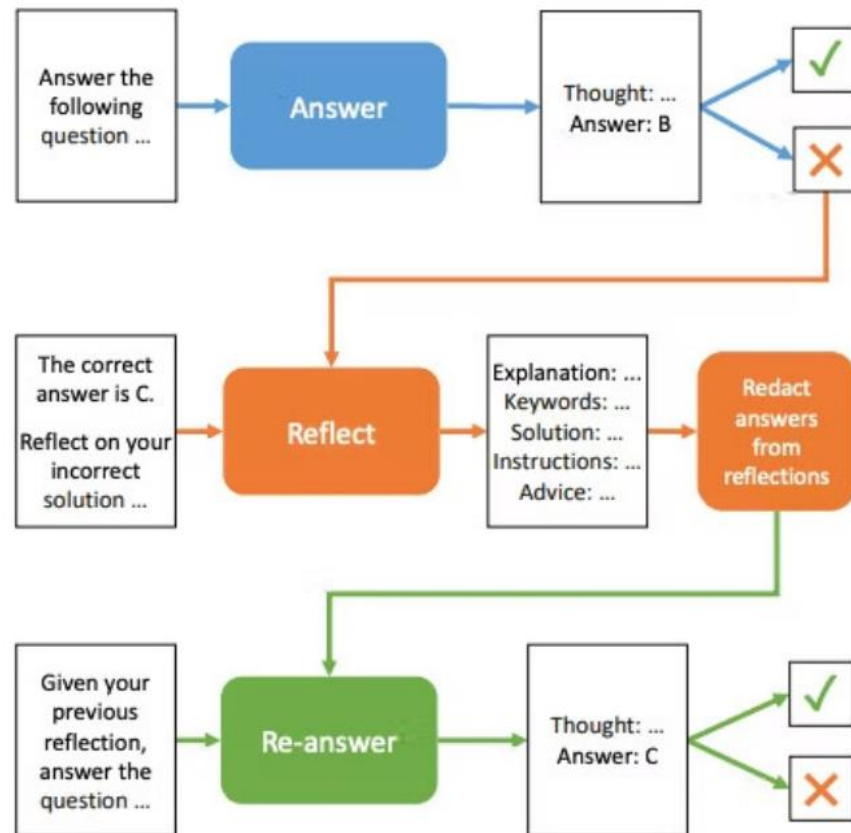


Figure 1: Diagram of the self-reflection experiment.

Algorithm 1 Self-reflection Experiment (Batch)

```

1: for each model, exam, and problem do
2:   Create the answer prompt
3:   Answer the question
4:   if the answer is incorrect then
5:     Add the problem to the incorrect list
6:   end if
7: end for
8: Calculate the Baseline agent scores

9: for each model, exam, and problem do
10:  Reflect upon the incorrect solution
11:  Generate the self-reflections
12:  if not the Unredacted agent then
13:    Redact the answers
14:  end if
15:  Separate the reflections by type
16: end for

17: for each model, agent, exam, and problem do
18:  Create the re-answer prompt
19:  Inject the agent's reflection
20:  Re-answer the question
21: end for
22: Calculate the reflected agent scores
  
```



Conclusion and Q&A

Agentic AI presents a powerful opportunity to operationally streamline various industries. However, it's crucial to evaluate use cases carefully and prioritize ethical considerations.

Are there any questions?

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