

# Project Charter: One-Page Summary

<b>Project Description</b>		<b>Constraints/Dependencies</b>	
<i>Given a financial report, respond to queries from a user and conduct a dialogue to assist with and speed up investment decision-making.</i>		<i>Computational Resources: The system's performance may be constrained by the available computational resources.</i> <i>Data Availability: The success of the project relies on the quality and quantity of the dataset.</i> <i>Regulatory Compliance: System must comply with financial regulations.</i>	
<b>Problem or Opportunity Statement</b>		<b>In Scope</b>	
<i>Develop an advanced Financial Question Answering system using the given datasets, to provide timely and accurate responses to queries based on financial reports enhancing the efficiency of investment decision-making.</i>		<i>The project involves implementing state-of-the-art Natural Language Processing (NLP) techniques to build a Financial Question Answering system. This includes training models on the given datasets, developing an intuitive user interface, and conducting thorough testing to ensure reliability. The scope extends to handling a variety of financial questions related to reports, statements, and market analysis, handling variations in questions &amp; content.</i> <ul style="list-style-type: none"><li>□ The system achieves a predetermined accuracy/performance metrics threshold (e.g., 90%) on a standardized test set that is comparable with other solutions available in the market on such performance metrics.</li><li>□ Average response time for queries falls below the specified threshold .</li><li>□ The UI allows for taking financial data and questions and displays answer those questions allowing for follow-up questions..</li><li>□ The system can handle context and conversations and answer financial questions from a dialogue displaying understanding of domain specific nuances.<ul style="list-style-type: none"><li>• effectively.</li></ul></li></ul>	
<b>Critical To Quality Metrics</b>		<b>Benefits</b>	
<i>Accuracy: Ensure precise and reliable answers to financial queries.</i> <i>Response Time: Provide timely responses to enhance decision-making speed.</i> <i>ROUGE score: Ensure the responses are aptly constructed using ROUGE and BLEU scores to evaluate the response construction (not the numerical values)</i> <i>User Experience: Evaluate the ease of providing data, asking questions and user-friendly interface for managing a dialogue and getting responses.</i> <i>Domain specific Accuracy: Assess the system's ability to handle varying types of financial content and responding to complex language.</i> <i>Dialogue Accuracy: Evaluate the ability of the system to provide responses to questions in context of the dialogue</i>		<i>Accelerated Decision-Making: Users can quickly extract relevant information from financial reports, reducing the time required for investment decision-making.</i> <i>Improved Decision Accuracy: The system enhances decision accuracy by providing precise and reliable answers to complex financial queries.</i> <i>Enhanced User Productivity: Users experience increased efficiency in information retrieval, allowing them to focus on strategic aspects of investment analysis.</i> <i>Knowledge Accessibility: The project promotes wider access to financial insights, catering to both seasoned professionals and those with limited financial expertise, fostering a more inclusive investment environment.</i>	
<b>Assumptions</b>		<b>Budget (If applicable)</b>	
<i>The dataset adequately represents diverse range of financial question types and complexities and simulates financial dialogue.</i> <i>Users input questions in clear and concise language relevant to financial analysis.</i> <i>The system assumes a baseline understanding of financial concepts and terminology for the user.</i>		Funding Requirement: N/A	