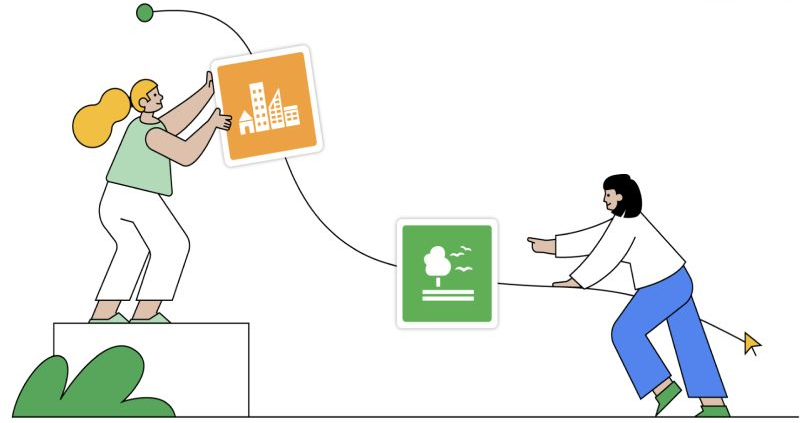


Solution Challenge



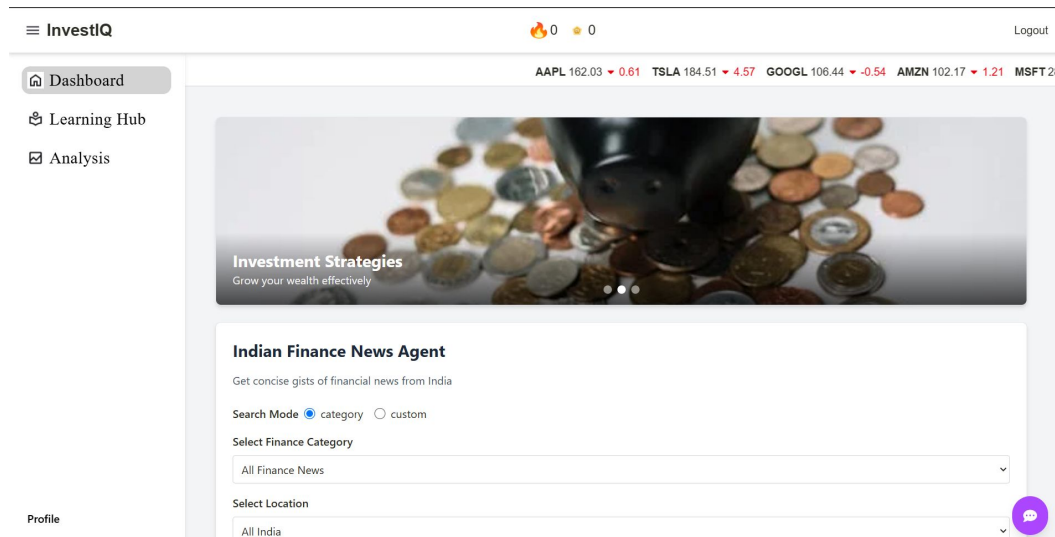
Team Details

- a. **Team name: VNSxDEVS**
- b. **Team leader name: Smarth Sood**
- c. **Problem Statement: GenAI-Powered Financial Assistant for Better Investing Decisions**

Overview of Our Solution- InvestIQ

Key Features of Our Platform:

- A **learning hub** that helps users understand financial concepts through interactive modules.
- An AI-powered **portfolio & trend analyzer** that provides real-time investment insights.
- **Conversational AI** to answer queries & personalize learning journeys.



Scope: Designed for the Indian market, with multilingual support to reach even rural areas.

Opportunities

But, how we stand out? 🤔

- Gamification for motivation.
- AI-driven insights for personalized financial advice.
- Seamless integration of learning & investing.

And, Why this works? 💡

- Scalable & accessible to millions.
- Data-backed decision-making instead of generic content.
- AI-driven, ensuring continuous improvement & updates.

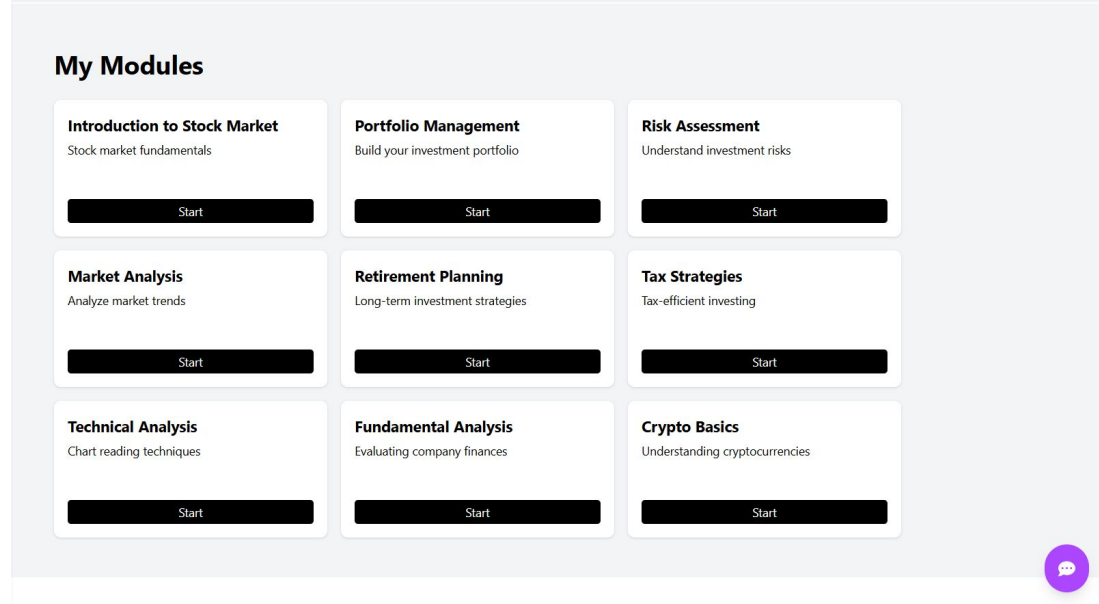
InvestIQ's USP:

An AI-powered financial literacy platform with multilingual support, offering personalized learning and real-time portfolio insights to help users make informed financial decisions.

Feature 1: Learning Hub

How It Helps Users:

- Personalized modules based on user preferences.
- Quizzes, XP points, badges & real-world rewards.
- Interactive chatbot for real-time Q&A.
- Content in Multiple regional languages.



Feature 2: Analyzer

How It Helps Users:

- Personalized portfolio analysis & recommendations.
- Trend analysis of companies for informed investment decisions.
- Conversational AI to guide users in investment strategies.
- Localized financial insights based on regional markets.


Portfolio Analyzer

Welcome to Comprehensive Financial Advisor! I can help with:


- Stock comparisons (e.g., 'Compare TCS.NS vs INFY.NS')
- Portfolio analysis (e.g., 'I have 10 ITC and 5 HDFCBANK')
- Investment plans (e.g., 'Plan to invest ₹50K monthly')
- Life goals (e.g., 'Need ₹3Cr house plan in 5 years')
- Indian stock analysis (e.g., 'Analyze RELIANCE.NS')

🔊

☐ Include risk assessment


English 


Clear chat





Submit

Examples: "Compare TCS vs INFY" or "Need ₹3Cr home plan in 5 years"




 Welcome to Stock Analyzer! Please enter a stock ticker (e.g., RELIANCE.NS, TCS.NS) and select analysis period.

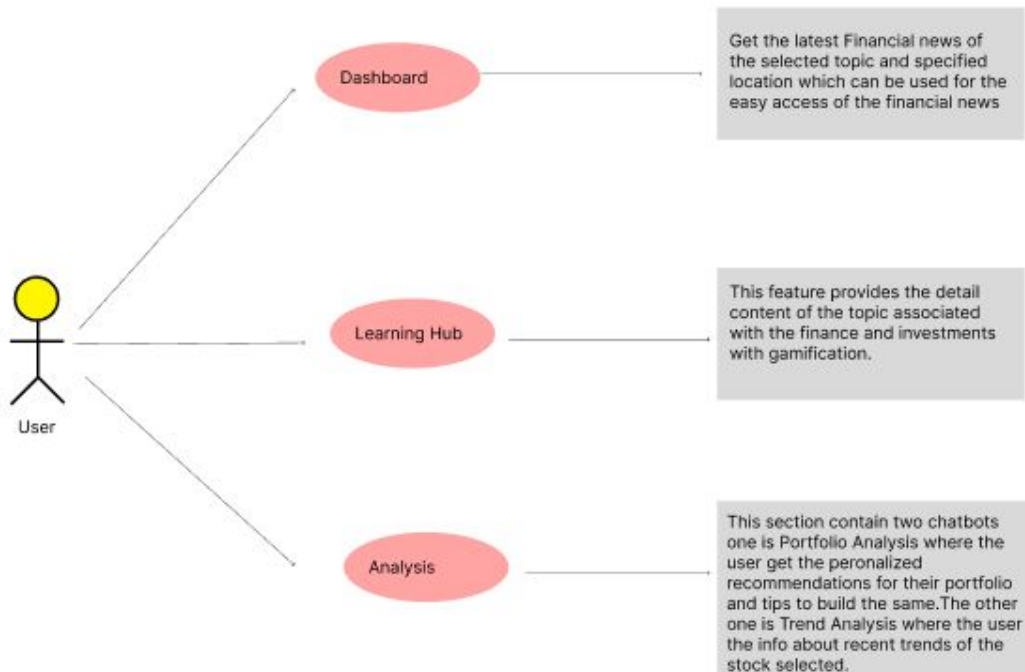
 Connected to stock analysis service. Ready to analyze!

 Connected to stock analysis service. Ready to analyze!

6 Months

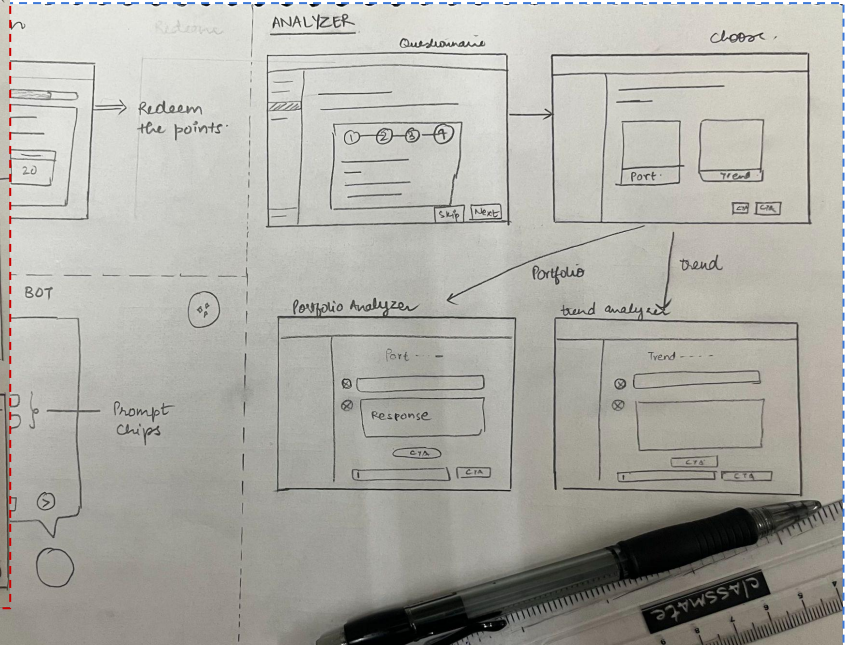
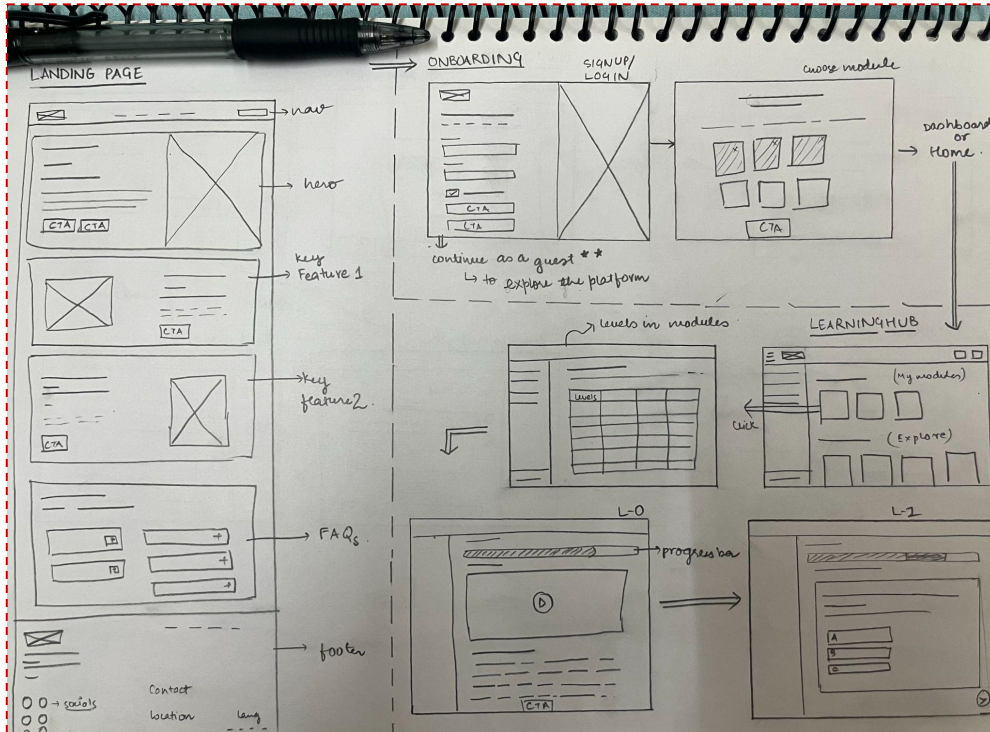


Use-case diagram

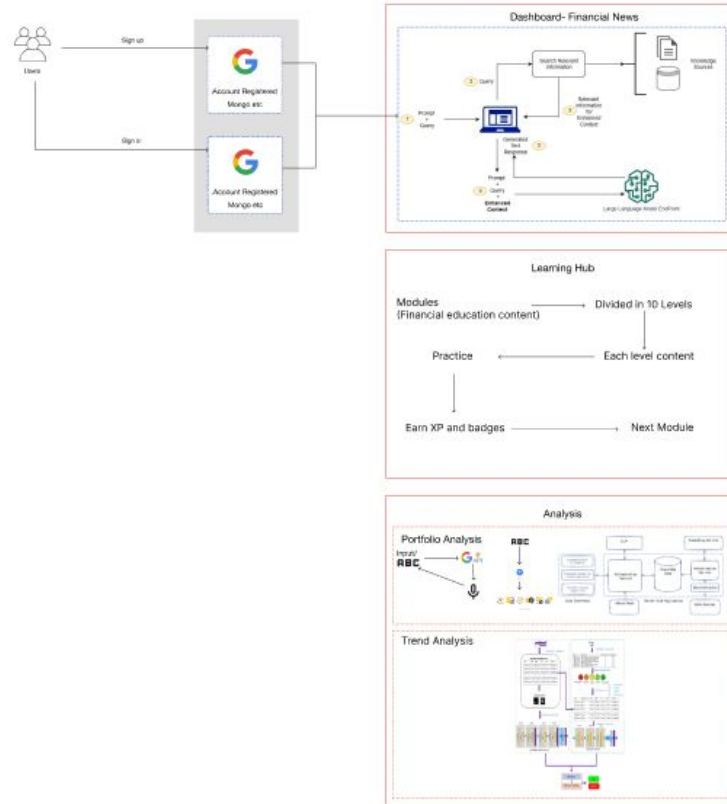


Wireframes

WE STARTED WITH SIMPLE PEN-AND-PAPER SKETCHES TO QUICKLY SHARE IDEAS, REFINED CONCEPTS, AND IMPROVE OUR DESIGN THROUGH MULTIPLE ITERATIONS.



Architecture diagram



Technologies to be used in the solution

Tech Stack Used:

- **LLM & RAG Architecture** for dynamic query answering using internet-augmented knowledge.
- **Vector DBs (FAISS/Chroma) + Embedding Models (OpenAI/SBERT)** for semantic search.
- **Sentiment Analysis** (VADER/Transformers) to understand user mood in portfolio queries.
- **HMM-based Intent Detection** for classifying query types.
- **Reasoning Decomposition** for breaking complex queries into sub-steps.
- **Web Search APIs** for real-time information retrieval.
- **LangChain / LlamaIndex** for chaining LLMs with tools and data sources.

Snapshots of the MVP

InvestIQ

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Future Development

- AI-powered financial planning for **long-term** wealth goals.
- Collaborative investment **communities** for peer learning.
- Integration with **brokerage platforms** for seamless execution.
- Enhanced localization with **voice-based learning** in regional languages.



Provide links to your:

1. GitHub Public Repository:<https://github.com/SmartSood/Invest-IQ-Finance-Demo>
2. Demo Video Link (3 Minutes):https://drive.google.com/drive/folders/1VObzhZ39tggpdpj85fvfCWtStHnmF8i_M?usp=drive_link
3. MVP Link:<https://invest-iq-finance-demo.vercel.app/>



Solution Challenge



Thank you

