

FinanceGPT Chatbot Demo

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Goal of this project

- Create a chatbot that can answer questions from financial documents more accurately than a generalized LLM like GPT
- Offering the choice to choose between private and public models as financial documents can contain sensitive information

Why this is useful/important

- Reduce the time and effort human analysts have to spend manually annotating and extracting information
 - Financial documents can be hundreds of pages long
 - Manually reading and gathering information from these documents is tedious and time consuming
- Create a chatbot that is specific to the financial industry rather than a generalized LLM
- Finetune the ML model and feed in additional context in order to reduce the possibility of hallucinations to optimize the accuracy

3 Task Types

- Document upload: User can upload documents locally from their computer and query questions based off of it
- Edgar API: Using the SEC's API, a user can enter a company ticker and retrieve the relevant financial document, then query questions
- MySQL: User can upload their own SQL db, then ask questions based off of it

Features of the product

- Allows you to pick different models (private or public)
 - Claude, GPT4All, OpenAI, LLaMA
- Utilize fine-tuned models specific to your task type (or even use your own)
- Retains your chat history
- For each question asked, the chatbot will show you:
 - Which document the information is from (if there are multiple) and the page number
 - The relevant section from the text where the answer is located

Demo

Insert video/photos later