Financial Intelligence Platform

Executive Brief for Leadership Approval

Product Owner	Abhay Pandey	**Tech Lead**	Harish Pandey
Sponsor	Nandan Mishra	**Status**	Awaiting Approval

Executive Summary

We propose building an **AI-powered Financial Intelligence Platform** that transforms scattered financial news into validated, actionable investment signals. By aggregating 200-500 curated news sources and applying intelligent filtering, we will enable investors to detect market themes, extract signals, and back-test them against real outcomes — capabilities currently locked behind $20,000+ Bloomberg/Reuters subscriptions. **Our pilot targets the Canadian market with 15 sources, delivering a working product in 8 weeks.**

The Problem

Investment professionals drown in fragmented information. News is scattered across hundreds of sources, and raw headlines don't translate into actionable insights. Existing solutions from Thomson Reuters, Bloomberg, and LexisNexis cost $20,000+ annually and serve only large institutions.

Stakeholder Guidance

> *"News is not just news—you need to understand how an insight comes out of two things: there is a worldview and there is a model we'll build as a frame of reference. When people create insights, we need to train it for a particular worldview, particular insight class, particular sector, locations, etc."*

> **— Nandan Mishra**

The core insight: **Raw news is worthless without a structured framework to extract meaning.** Current tools dump information; they don't generate intelligence.

Why Now?

Market Opportunity

- Companies like Thomson Reuters, Wolters Kluwer, and LexisNexis influence ~**$20 trillion in investment decisions**
- Financial data & analytics market: **$35B+ globally, 10%+ CAGR**
- AI has made it possible to build what previously required armies of analysts

The Whitespace

> *"So understand—companies like LexisNexis, Brandwood… they do 7, 8, 9, 10 and do videos and give to their securities. We want to detect themes from those news sources, extract signals from them, and after signals, back-test them. Those are the parts we want to do."*
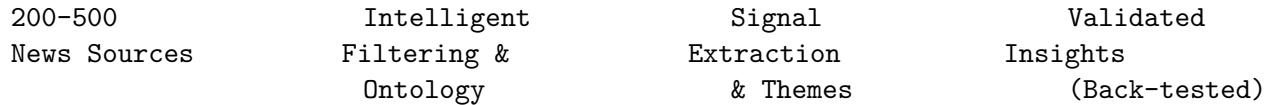
> — **Nandan Mishra**

No one has built an AI-native, affordable solution that validates signals through back-testing. This is our opportunity.

The Vision: What We're Building

A platform that takes investors from **raw news → validated investment signals** through an intelligent pipeline:

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200-500            Intelligent          Signal            Validated
News Sources       Filtering &          Extraction        Insights
                   Ontology             & Themes          (Back-tested)
```

The output: Actionable signals with confidence scores, validated against historical market data.

Worldview & Frame of Reference: Our Differentiator

This is the philosophical foundation that separates us from data aggregators:

Nandan's Framework

> *"The biggest sector first, then geography within the sector, then different classes within that. So we'll need to define the basic ontology of investment insights or whatever insights come out for the target audience."*

We don't just collect news — we **structure it through a defined worldview**:

Layer	What It Means	Example
Sector	Which industry matters?	Energy, Tech, Finance, Healthcare, Materials
Geography	Where is the impact?	Canada (pilot), US, Europe, India
Asset Class	What's affected?	Stocks, Indexes, Commodities, ETFs
Insight Type	What kind of signal?	Event-driven, Sentiment, Policy, Earnings

This ontology becomes the **"model as a frame of reference"** that transforms noise into insight. Users can customize this worldview based on their investment philosophy (value investing, growth, macro, sector-specific).

How It Works: The Three-Step Process

Himanshu's Explanation

> *"So the three steps: First is finding sources. The outcome we want is to make predictions for stocks directly or for indexes derived from stocks—what impact news has on them. Second is converting it into sentiment… linking to an outcome or stock, whether it's positive or negative, and the key is the headline—why it's negative. We extract these two pieces of information and try to see: news came, we linked it, but did it actually show impact or not?"*

> **— Himanshu Singh**

Simplified:

Step	What Happens	Output
1. Find Sources	Aggregate 15-20 curated financial news sources (Twitter/X, RSS, Reuters, etc.)	Unified news feed
2. Extract Signals	Link news to stocks/indexes, determine sentiment (positive/negative), extract the "why"	Actionable signals with reasoning
3. Validate	Back-test signals against historical market data to verify accuracy	Confidence scores & accuracy metrics

The Challenge We'll Solve

> *"This part is a bit tricky because news is often not time-bound. Sometimes something comes like, 'This policy changed, so car stocks will go up,' but when will they go up? For that you'd need a time-series window."*

> **— Himanshu Singh**

Our back-testing engine will analyze **1-day, 7-day, and 30-day windows** to measure actual impact.

Who Benefits: User Personas

Persona	Pain Point	How We Help
Index Fund Manager	Needs to understand what drives index movements	Link news to index performance with validated signals

Persona	Pain Point	How We Help
Quantitative Analyst	Needs machine-readable signals for algorithms	API feed of back-tested signals
Research Analyst	Spends 60%+ time manually aggregating news	Auto-generated thematic reports

Expected Outcomes & Benefits

For Users

- **10x faster** insight generation (hours → minutes)
- **Validated signals** instead of guesswork (60%+ directional accuracy target)
- **Affordable access** to institutional-grade intelligence

For the Business

- **New revenue stream** in $35B+ market
- **Pilot-ready product** in 8 weeks
- **Scalable model** — add sources, geographies, and asset classes over time
- **Competitive moat** through proprietary ontology and back-testing engine

Pilot Success Criteria

Metric	Target
Signal accuracy	>60% directional accuracy
Entity linking	>90% correct stock/company mapping
Processing speed	<5 minutes from news to signal
User validation	3-5 beta users actively using daily

Investment Ask & Next Steps

What We Need

Resource	Ask
Team	1 Product Owner (Abhay), 1 Tech Lead (Harish), 2-3 developers, 1 intern
Timeline	8 weeks to pilot-ready MVP
Infrastructure	Cloud compute, API access to news sources & market data

Resource	Ask
Pilot Budget	API costs for news sources + market data (~estimated based on sources selected)

Immediate Next Steps (Upon Approval)

1. **Week 1:** Finalize 15 Canadian news sources for pilot
2. **Week 2:** Set up ingestion pipeline and ontology framework
3. **Week 3-4:** Build signal extraction and sentiment analysis
4. **Week 5-6:** Implement back-testing engine
5. **Week 7-8:** Dashboard, API, and pilot testing with beta users

What We're Asking For

Approval to proceed with the 8-week pilot focused on the Canadian market (TSX), with the goal of validating the core value proposition before expanding to US/Europe/India.

Appendix: Key Quotes from Strategy Session

Speaker	Quote
Nandan	*"News is a very leading indicator… Back-testing is an important part. So we want to detect themes from those news sources, extract signals from them, and after signals, back-test them."*
Nandan	*"There is a worldview and there is a model we'll build as a frame of reference. When people create insights, we need to train it for a particular worldview."*
Nandan	*"Create a similar pilot for the Canadian market—it might be easier there. Prices might be higher there."*
Himanshu	*"First is finding sources… Second is converting it into sentiment… We extract these two pieces of information and try to see: news came, we linked it, but did it actually show impact or not?"*

Document prepared by: Abhay Pandey | For: Leadership Review

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