

# Stock Portfolio Analyzer with AI Advisors

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## User Manual

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### Table of Contents

1. [Introduction](#)
  2. [Getting Started](#)
  3. [System Requirements](#)
  4. [Installation](#)
  5. [Running the Application](#)
  6. [Portfolio Management](#)
  7. [Uploading Your Portfolio](#)
  8. [Using the Sample Portfolio](#)
  9. [Downloading Portfolio Template](#)
  10. [Application Sections](#)
  11. [Portfolio Overview](#)
  12. [Stock Analysis](#)
  13. [AI Recommendations](#)
  14. [AI Advisor Features](#)
  15. [ValueMax Agent](#)
  16. [RiskGuard Agent](#)
  17. [Using the AI Chat Interface](#)
  18. [Consulting Both Advisors](#)
  19. [Technical Analysis Tools](#)
  20. [Troubleshooting](#)
  21. [FAQ](#)
  22. [Contact Support](#)
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## Introduction

The Stock Portfolio Analyzer with AI Advisors is a powerful tool designed to help investors manage and analyze their stock portfolios with the assistance of artificial intelligence. The application uses real-time market data from Yahoo Finance and provides AI-powered investment recommendations through two specialized agents with different investment philosophies. This application is specifically optimized for Indian stock market investors with support for Indian stocks (NSE) and INR currency format.

**Key Features:** - Portfolio valuation and performance tracking in Indian Rupees (₹) - Detailed stock analysis with interactive charts - Technical analysis indicators and visualization - AI investment recommendations from dual perspectives - Specialized support for Indian stocks (NSE) - Interactive chat interface with AI investment advisors

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## Getting Started

### System Requirements

- Modern web browser (Chrome, Firefox, Edge, or Safari)
- Internet connection to access real-time market data
- No specific hardware requirements

### Installation

No installation is needed for the web application. Simply navigate to the provided URL in your web browser.

### Running the Application

1. Open your web browser
  2. Navigate to the application URL: <https://replit.app>
  3. The application will load automatically
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## Portfolio Management

### Uploading Your Portfolio

The application allows you to upload your own portfolio in CSV format:

1. Prepare your portfolio CSV file with columns:
2. Instrument (stock ticker symbols)
3. Qty (number of shares)
4. Avg cost (purchase price per share)
5. Click on "Upload your portfolio CSV" in the sidebar
6. Select your file from your computer
7. The application will validate and load your portfolio data

### Using the Sample Portfolio

For demonstration purposes or to explore the application without uploading data:

1. Click on "Use sample portfolio" in the sidebar
2. A pre-configured portfolio with sample stocks (including Indian stocks with .NS suffix) will be loaded

### Downloading Portfolio Template

To help you create a properly formatted portfolio file:

1. Click on "Download template" in the sidebar
  2. Save the CSV file to your computer
  3. Open it in a spreadsheet program (e.g., Excel, Google Sheets)
  4. Fill in your stock information
  5. Save as CSV for uploading
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## Application Sections

### Portfolio Overview

The Portfolio Overview provides a comprehensive view of your holdings:

1. Total portfolio value and performance metrics
2. Allocation breakdown by stock
3. Interactive chart showing portfolio composition
4. Detailed table with current values, profit/loss, and daily changes
5. Performance indicators with color-coding

### Stock Analysis

The Stock Analysis section allows detailed examination of individual stocks:

1. Select a stock from your portfolio using the dropdown
2. View interactive price charts with selectable time periods
3. See key metrics like current price, P/E ratio, and 52-week range
4. Explore fundamental data and financial indicators
5. Analyze trends and historical performance

### AI Recommendations

The AI Recommendations section provides investment insights:

1. Choose between different analysis types
2. AI Investment Chat
3. Portfolio Overview
4. Individual Stock Analysis
5. Rebalancing Suggestions
6. Get AI-generated recommendations and analysis
7. View technical analysis charts and indicators

8. See side-by-side perspectives from both AI agents
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## AI Advisor Features

### ValueMax Agent

The ValueMax agent is focused on maximizing returns and growth potential:

- Identifies high-growth opportunities
- Accepts higher risk for greater potential returns
- Focuses on momentum and growth stocks
- Provides recommendations aimed at wealth building

### RiskGuard Agent

The RiskGuard agent emphasizes capital preservation and risk management:

- Prioritizes protection of investments
- Focuses on stable, lower-volatility assets
- Recommends diversification strategies
- Emphasizes long-term security over short-term gains

## Using the AI Chat Interface

The AI Investment Chat feature enables direct interaction with both agents:

1. Select "AI Investment Chat" from the analysis types
2. Two chat interfaces appear side-by-side (ValueMax and RiskGuard)
3. Type your investment question in either agent's input field
4. Click the corresponding "Ask" button
5. Receive personalized advice based on that agent's investment philosophy
6. Continue the conversation with follow-up questions

## Consulting Both Advisors

To get balanced perspectives on the same question:

1. Scroll to the "Ask Both Advisors" section
  2. Type your investment question once
  3. Click "Consult Both Advisors"
  4. Both ValueMax and RiskGuard will respond with their unique perspectives
  5. Compare and contrast their recommendations to make informed decisions
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## Technical Analysis Tools

The application provides various technical analysis tools:

- Moving averages (20-day, 50-day, 200-day)
- Relative Strength Index (RSI)
- Volume analysis
- Trend identification
- Volatility measurement
- Price change calculations for various time periods

Indicators are available in collapsible sections with the stock analysis for easy reference.

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## Troubleshooting

**Issue: Portfolio upload fails** - Ensure your CSV file has the correct column names (Instrument, Qty, Avg cost) - Check that stock symbols are valid (use .NS suffix for Indian stocks) - Verify that your file is properly formatted CSV

**Issue: Stock data not loading** - Confirm internet connection is stable - Verify that the stock symbol is valid and actively traded - Try refreshing the page

**Issue: AI recommendations not generating** - Be patient during high usage periods, as AI generation may take longer  
- Try a more specific question if responses are too general -  
Reload the page if persistent issues occur

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## FAQ

**Q: What stock exchanges are supported?** A: The application supports all major exchanges covered by Yahoo Finance, with special handling for Indian NSE stocks (using .NS suffix).

**Q: How often is the market data updated?** A: Market data is fetched in real-time when you analyze a stock, with slight delays based on the data provider's limitations.

**Q: Are the AI advisors providing real financial advice?**  
A: No, the AI recommendations are for informational purposes only and should not be considered professional financial advice. Always consult with a qualified financial advisor for investment decisions.

**Q: Can I save or export the AI recommendations?** A: Currently, you would need to manually copy and save the information. Export functionality may be added in future updates.

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## Contact Support

For assistance, questions, or feedback:

- Send an email to: [support@example.com]
- Visit our support page: [https://example.com/support]
- For urgent matters, contact: [+91-8800-123-456]