# A Guided Investment Platform for First-Time Investors

# Meet the team

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# Problem

## Our Why

- Problem Statement: Many young adults aspire to obtain a source of passive income yet do not know how to invest money.  Making serious financial decisions requires conquering huge knowledge curve.
- Context: Over 70% of young adults want to learn more about investing to make long term plans about their future.

## Interests

- Aspiration to solve problem to help customers with increasing financial education amongst young adults and understand how to obtain the highest ROI from income
- Aim to open up opportunities for passive income for individuals.

# Solution

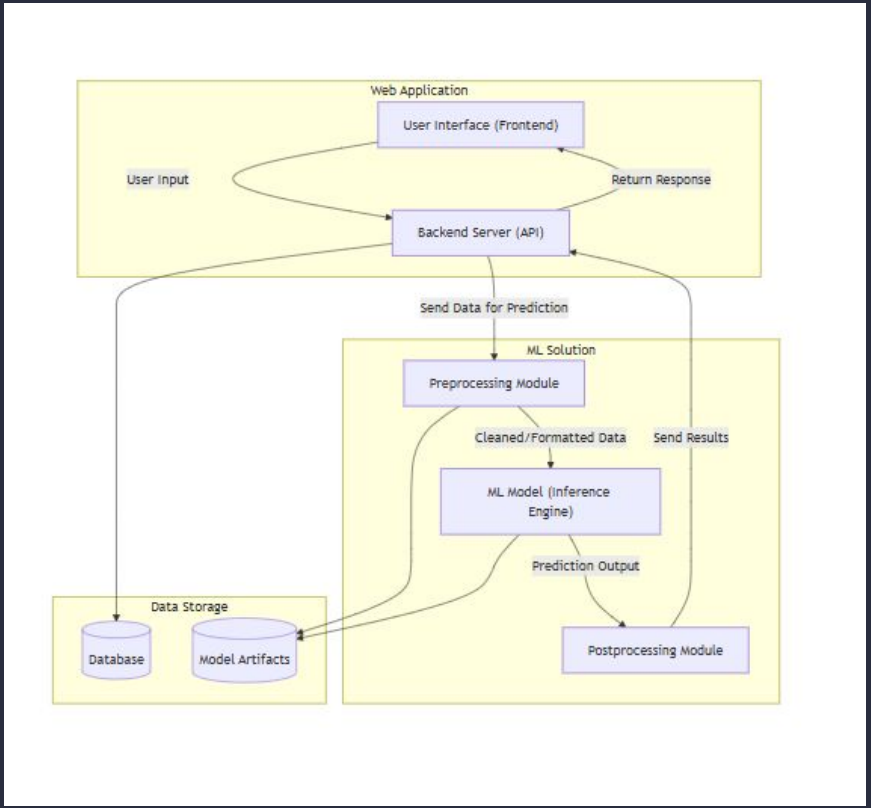
## Tools used to Solve Problem

- Potential LLM(s) used for data preprocessing & post-processing: Llama 3
- Type of ML Problem: Supervised Learning: Classification
- Type of ML Used: Cloud ML
- Proposed algorithms to assist in solution: a) Linear Regression, b) Decision Trees, and/or c) SVM(Support Vector Machine)s.

## ML Solution & Algorithm(s) to Solve Problem

- Benefits of Using ML Type: a) Provision of Vast Computational, b) Access to advanced tools and algorithms specialized for machine learning, c) Collaborative Environment for Seamless teamwork
- Challenges of using ML Type: a) Latency, b) Data Privacy and Security, c) Network Dependency
- How ML Will be used: ML Model will be created to predict the highest rate of return  which will help users understand how to pick stocks

# Abstract Rep of Solution



# Data to supply ML Solution(s)

## Dataset Info

- Dataset used: **Financial Market Dataset** from Kaggle: :https://www.kaggle.com/datasets/imaadmahmood/global-finance-and-economic-indicators-dataset-2024
- Dataset used: https://archive.ics.uci.edu/dataset/390/stock+portfolio+performance from Kaggle
- Dataset used: https://www.kaggle.com/datasets/smayanj/stock-market-dataset from UCI Machine Learning Repository

## Why Dataset is used

- Why dataset will be used: This dataset will be used to provide accurate predictions involving global stock exchange and how the user can gain highest ROI

- The machine learning model will track financial risks to ensure that user is met with the necessary guidance to make sure they can receive a return in their investment

# Evaluation

## Quantitative:

Accuracy:

- # of times the model correctly predicts high ROI investment opportunities
- # of times the model accurately identifies financial risks

Time:

- amount of time it takes for the model to generate investment recommendations for the user

Statistical test:

- Compare results between our agent and a baseline model

## Qualitative:

- User Experience: Want to ensure that users are given appropriate information that supports their journey in obtaining another avenue to passive income

## Related Solutions:

- Fidelity Go: an automated investment service that helps with portfolio management for users new to investing.
- Betterment: A AI advisor platform that helps users by providing personalized investment planning (passive income). .