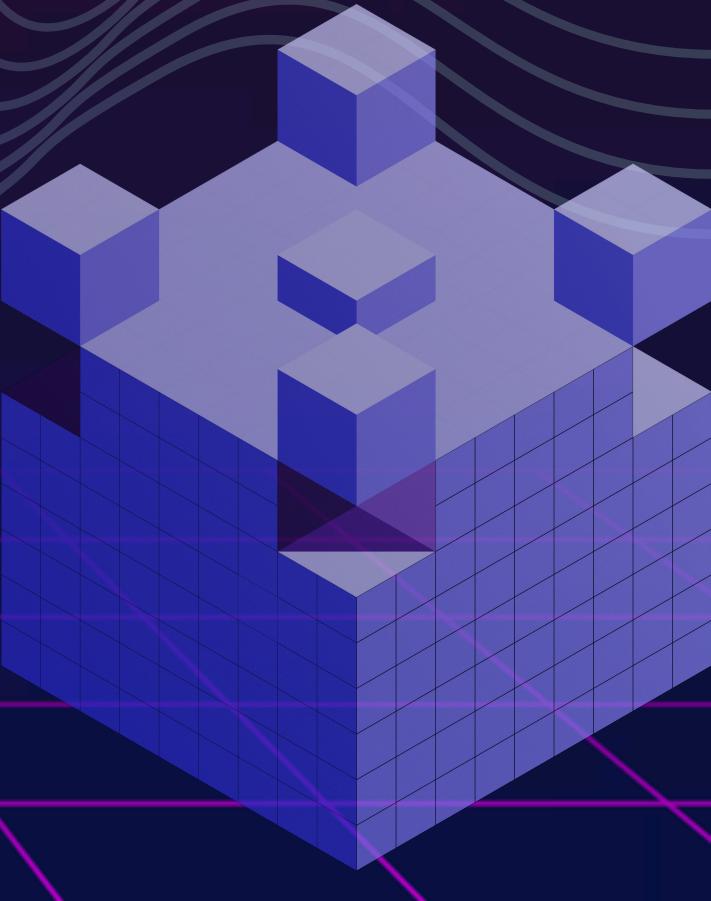
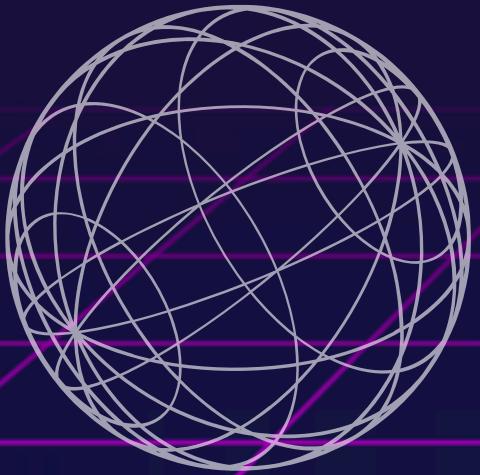
A close-up photograph of a robotic hand and a human hand interacting. The robotic hand is white and metallic, while the human hand is a light-skinned male. They are positioned as if they are about to shake hands or are in the middle of a handshake. The background is a blurred, futuristic-looking interface with glowing blue and green lines, a grid pattern, and some faint text and graphs, suggesting a high-tech financial or investment environment.

# FINVEST AI

WHERE AI MEETS ROI

# FINVEST AI: WHERE AI MEETS ROI

AIPRENEURS



# Finvest AI 💰💰

🤖 Chat with Finvest AI 🎤 by Y-Finance and Llama3



Hi! I am your friendly neighborhood financial analyst



Would you recommend me to buy Microsoft stock?



Based on the information, I would recommend considering Microsoft stock (MSFT) as a strong investment opportunity. The company has a stable financial performance, a strong balance sheet, and a high return on equity and assets. Additionally, the company has a strong revenue and earnings growth rate, and a high gross and operating margin. The analyst consensus is also strong, with a recommendation mean of 1.7 and a target price of \$493.54. However, as with any investment, it's important to do your own research and consider your own financial goals and risk tolerance before making a decision.

Your question ➤

# PROBLEMS

1

Information Overload

2

Lack of financial expertise

3

Emotional Investing





# FINVEST AI COMES TO THE RESCUE



## SOLUTION 1

Targeted Information Retrieval



## SOLUTION 2

Simplified results with explanations in chat interface



## SOLUTION 3

Informed decisions based on analysis of multiple data sources



# HOW IT WORKS

1.  
User requests for information on a company or asks questions



2.  
Data collated from different sources/ documents and summarized retaining key information



3.  
Appropriate tool (functionality for a specific type of financial data) picked up using ReActAgent framework depending on the user query



4.  
Rate limit exhaustion avoided using the llama3 model separately for tools and agent

5.  
Targeted information retrieval is possible with concise results due to robust decision making framework



# REACT AGENT

ReActAGENT

GET STOCK  
DATA TOOL

GET STOCK  
INFORMATION  
TOOL

GET COMPANY  
INFORMATION  
TOOL

GET BALANCE  
SHEET TOOL

GET INCOME  
STATEMENT  
TOOL

GET DIVIDEND  
DATA TOOL

STOCK DATA

STOCK  
INFORMATION  
DATA

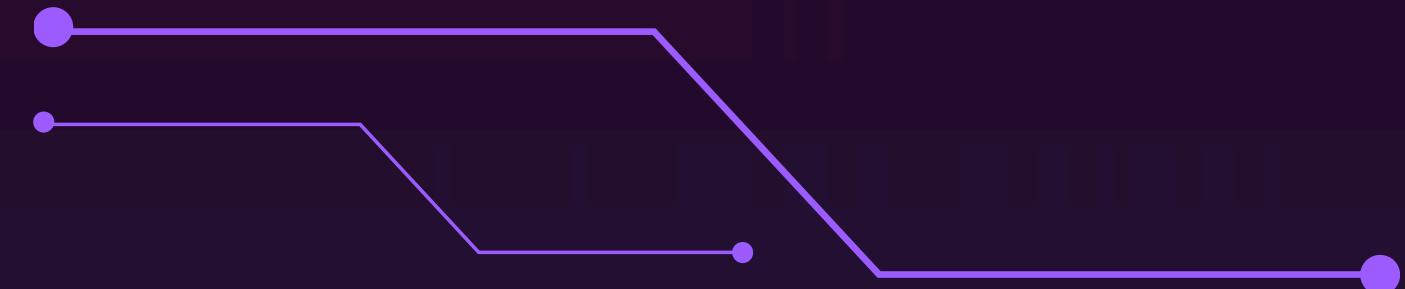
COMPANY  
INFORMATION  
DATA

BALANCE  
SHEET DATA

INCOME  
STATEMENT  
DATA

STOCK  
DIVIDEND  
DATA

# TECH STACK



LLAMA3

How will you reach your target consumers?

TOGETHER AI

How will you reach your target consumers?

LLAMAINDEX

How will you reach your target consumers?

# MARKET SCOPE

2.4 BILLION

Global Population with investment potential

33%

Interested in Robo Advisors

# MARKET SCOPE

- Retail Investors
- Robo-advisor platforms
- Wealth Management firms
- Banks

# REVENUE STREAM

REVENUE SHARING

SUBSCRIPTION MODEL

FREEMIUM MODEL

# COMPARISON WITH COMPETITORS



## COMPETITIVE EDGE 1

Refined Information Retrieval  
Architecture



## COMPETITIVE EDGE 2

Improved Explanability with  
easy to use chat interface



## COMPETITIVE EDGE 3

Integration with multiple data  
sources



# FUTURE SCOPE

- Integration with multimodal data
- Portfolio optimization and analysis
- Financial reports generator
- Real time alerts for trading



**THANK YOU!**

# TEAM: AIpreneurs

Team Members:

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Ashay Pable  
Aditya Agarwal  
Sai Lohith Madala  
Ashwin Dhanasamy  
Suganya

