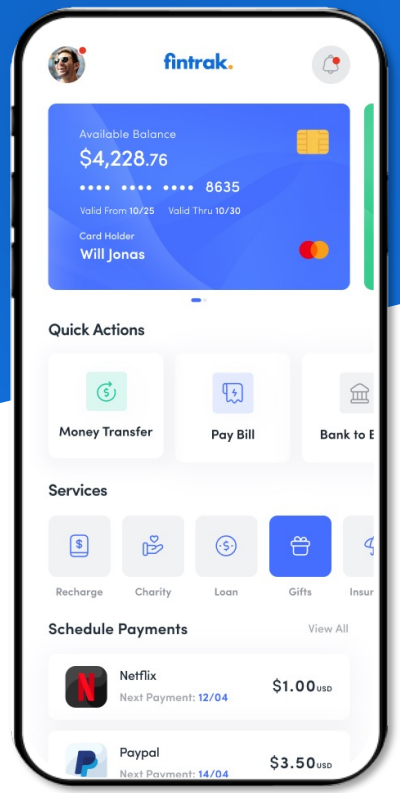
FinTrak: Revolutionizing Financial Insights

Empowering financial decisions with AI-driven insights

29th October, 2024



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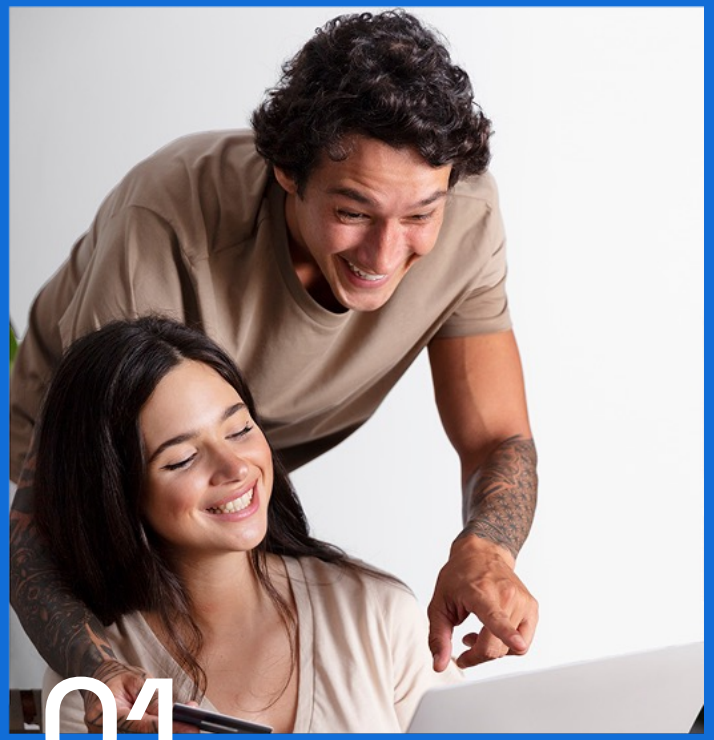
Agenda slide



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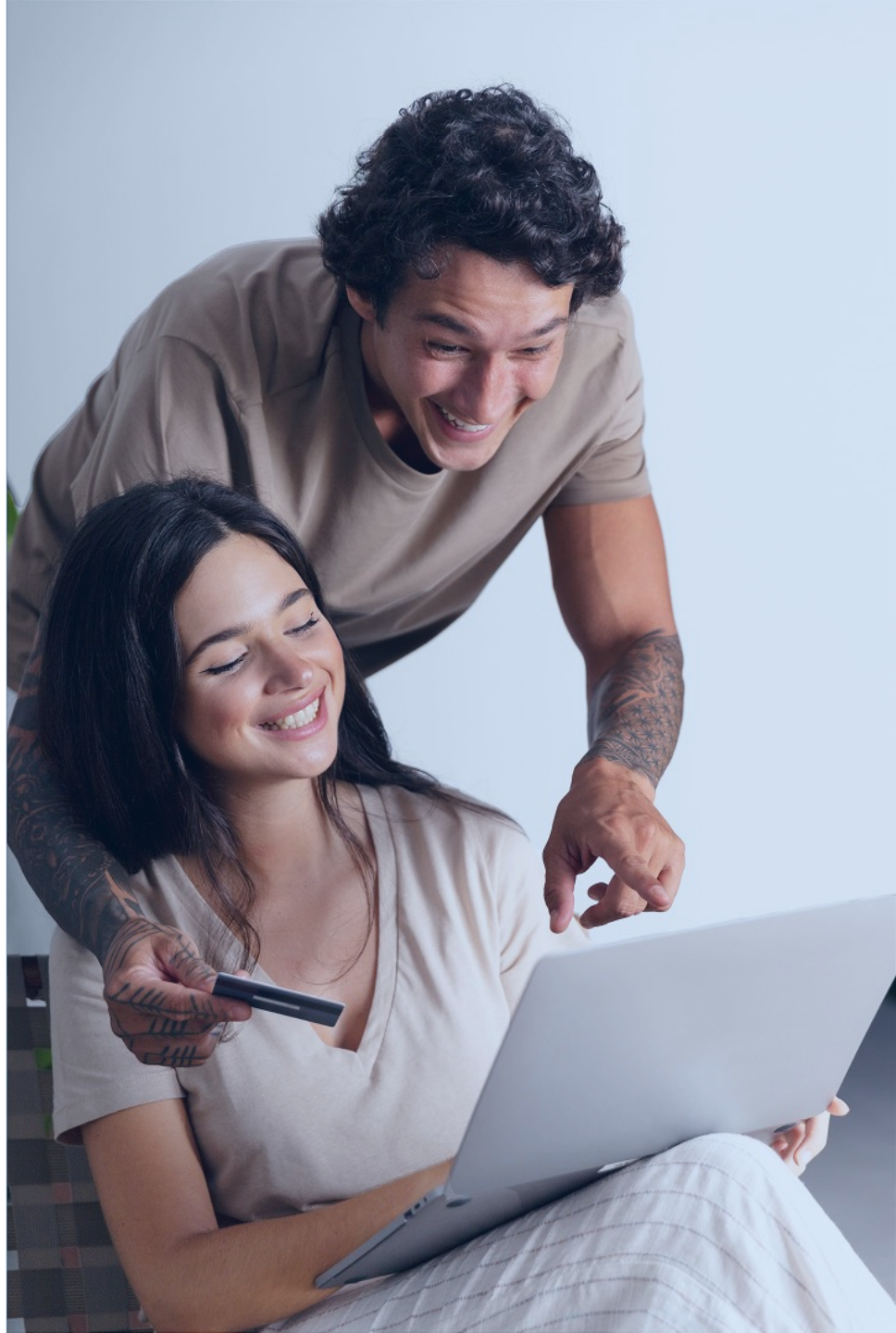
01

Introduction to Fintrak



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Company Overview

Mission Statement

To simplify personal finance with intelligent, data-driven insights that empower individuals to achieve financial freedom.

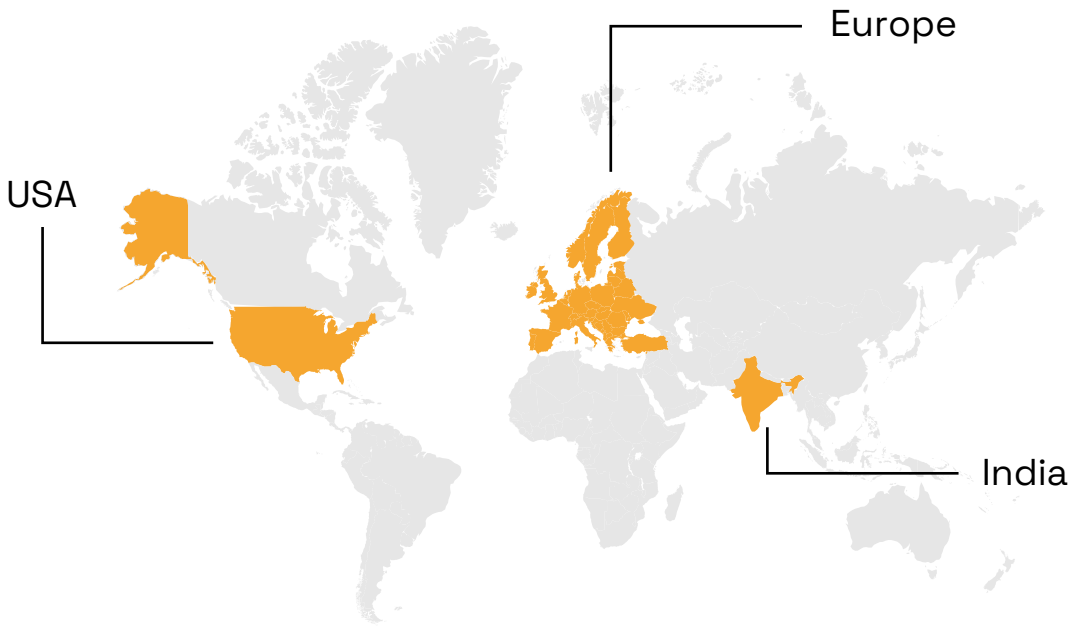
Vision

To be the most trusted platform for personalized financial guidance, enabling users to make smarter money choices.

Founding Year

2024

Key Markets



Target Audience

- Young professionals (ages 20-35)
- Small to medium business owners
- Retail investors looking for easy portfolio

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Product Overview

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Core Product Feature

AI-Powered Spending Analysis

FinTrak categorizes expenses and highlights spending patterns

Goal-Based Investment Advice

Users receive personalized investment suggestions based on set goals

Automated Financial Health Score

A unique scoring system evaluates user financial well-being (scores out of 100)

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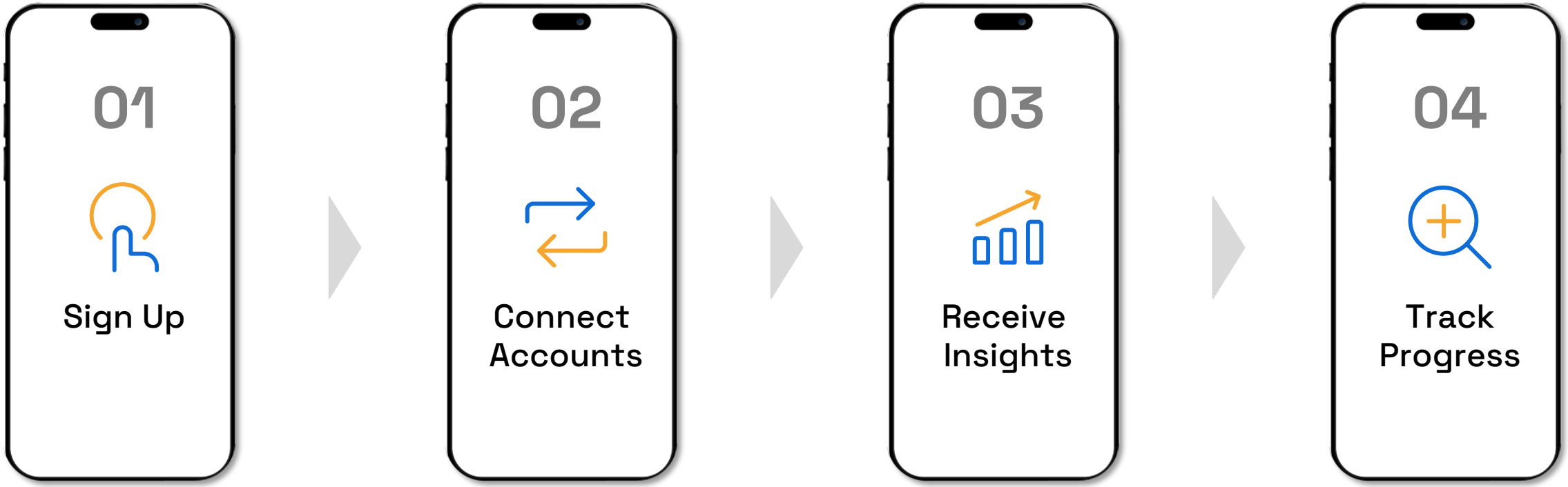
User Flow



Easy onboarding with just email or social login

Securely connect bank and investment accounts

AI-driven reports and actionable insights

Monitor monthly spending, savings growth, and investment performance

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Key Features

Key Product Differentiators:

Predictive Analytics

AI predicts and alerts users about spending trends

Data Privacy

Bank-grade encryption (AES-256) and multi-factor authentication

Seamless Integration

Syncs with over 15 financial institutions and apps

Statistics:

85%

of users reported improved financial decisions within 3 months

70%

of users engaged with at least one personalized financial insight each week

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Market Validation

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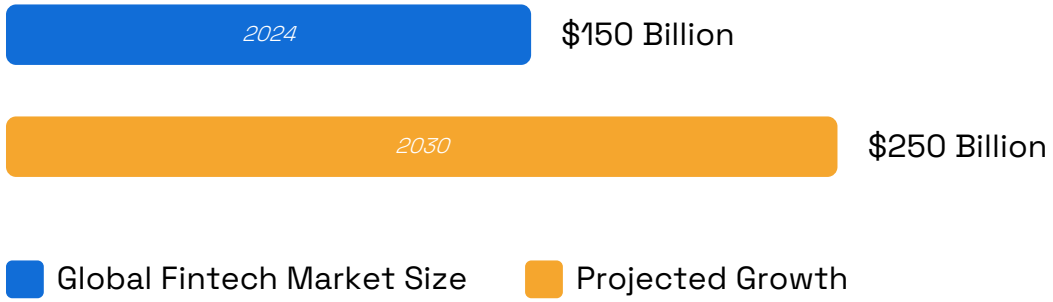
Market Validation

Market Statistics:



Competitive Analysis:

chime	Rapyd
$10/month	$15/month
No AI insights	Lacks predictive analytics
Limited to basic tracking	High subscription fees

Customer Demand

Survey Data: 70% of young professionals seek automated financial management tools.

User Retention Rate: FinTrak has a 90% retention rate among beta users.

> FinTrak's recommendations helped me save $200 in my first month. It's like having a financial advisor in my pocket.
>
> **— Beta User**

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Roadmap

Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q4 2026
Launch beta version in key markets (USA, India)	Add investment portfolio tracker	Expand AI capabilities with predictive savings insights	Introduce multi-language support (Spanish, French)	Expand globally across Asia and Europe

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