FinGenie

FinGenie

AI-Powered Financial Advice

9:41

Hello, Ramesh

Start Date

End Date

₹87,293
Your current balance

Total Income   Total Expense

Select

₹75,000
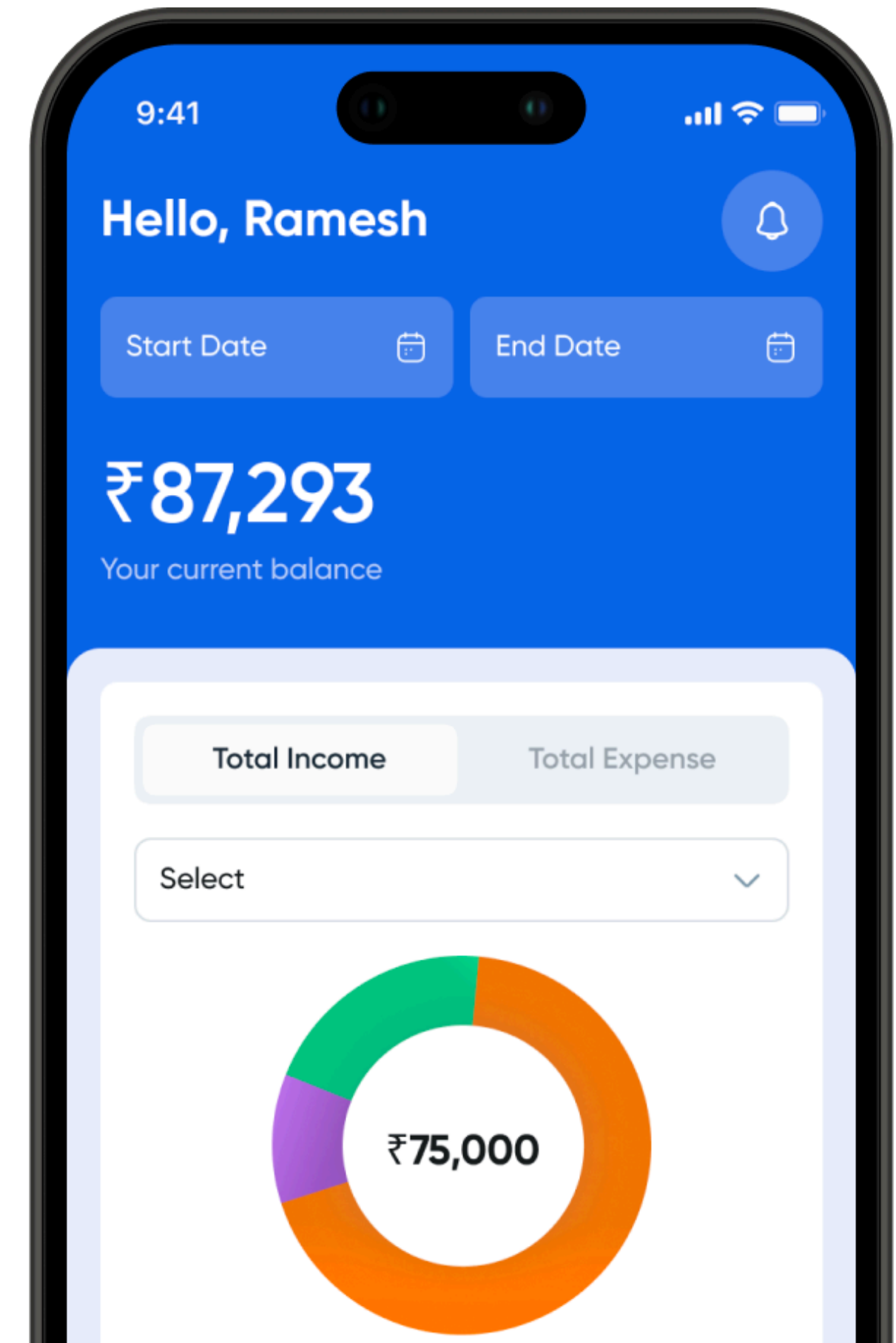
Welcome To Our Application

About Our Application

FinGenie is an AI-powered finance advisor that offers comprehensive savings and expense reports, as well as investment suggestions. The core features of the application include AI-generated reports based on your transactions, random expenses, and responses to a few questions. This ensures you receive the best investment advice tailored to your needs.

The app also features a dashboard with multiple visualizations, allowing users to compare their expenses and income over at least three months. The transaction module lets users add multiple transactions, enabling the app to track income and expense details accurately.
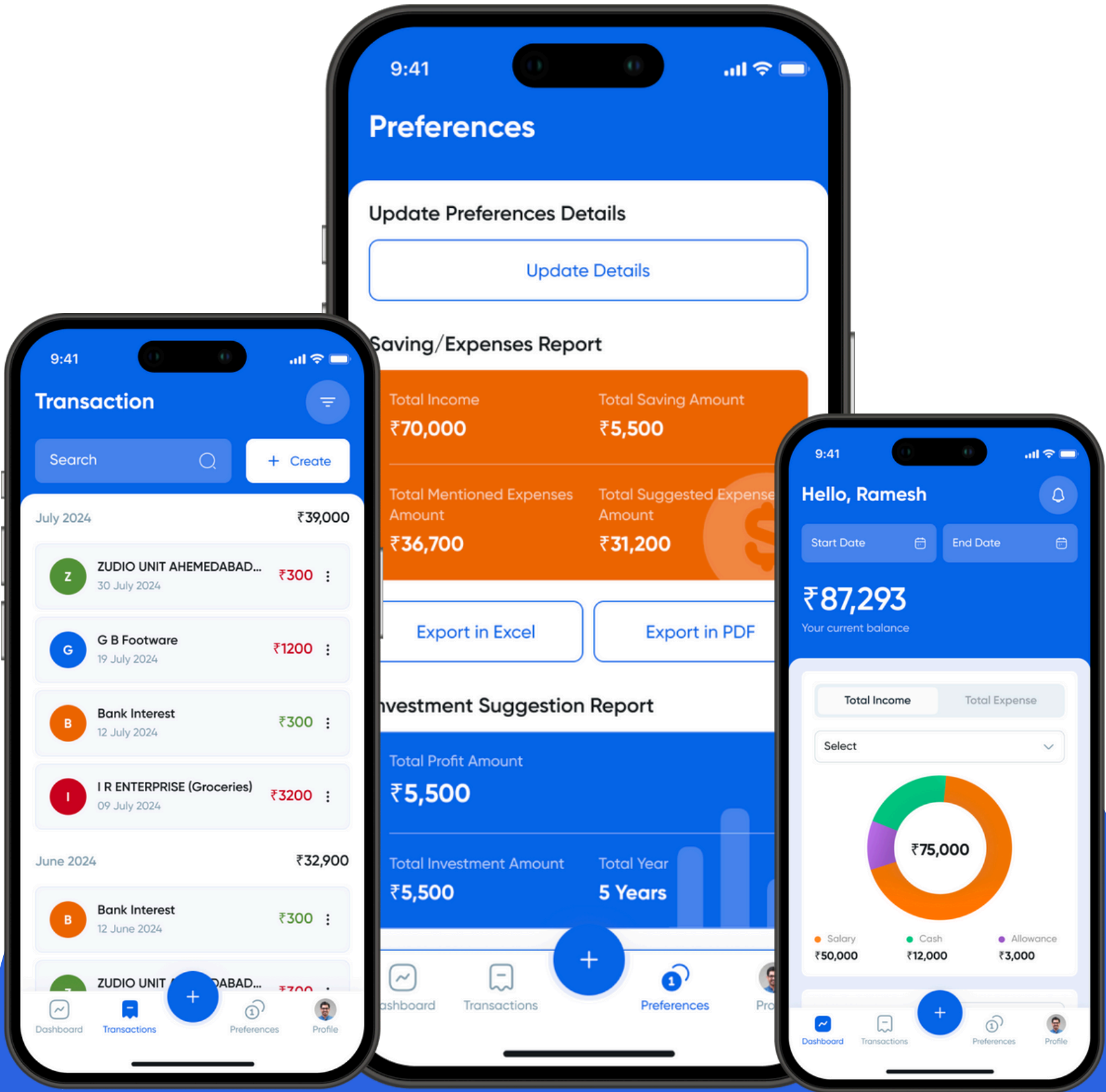
Mision and Vision

Mission

To provide personalized financial guidance using advanced AI, offering comprehensive reports and tailored investment suggestions to help users achieve financial stability and growth.

Mission Vision

To empower individuals with AI-driven financial insights, enabling them to make informed decisions, optimize their savings, and achieve their investment goals.

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FinGenie
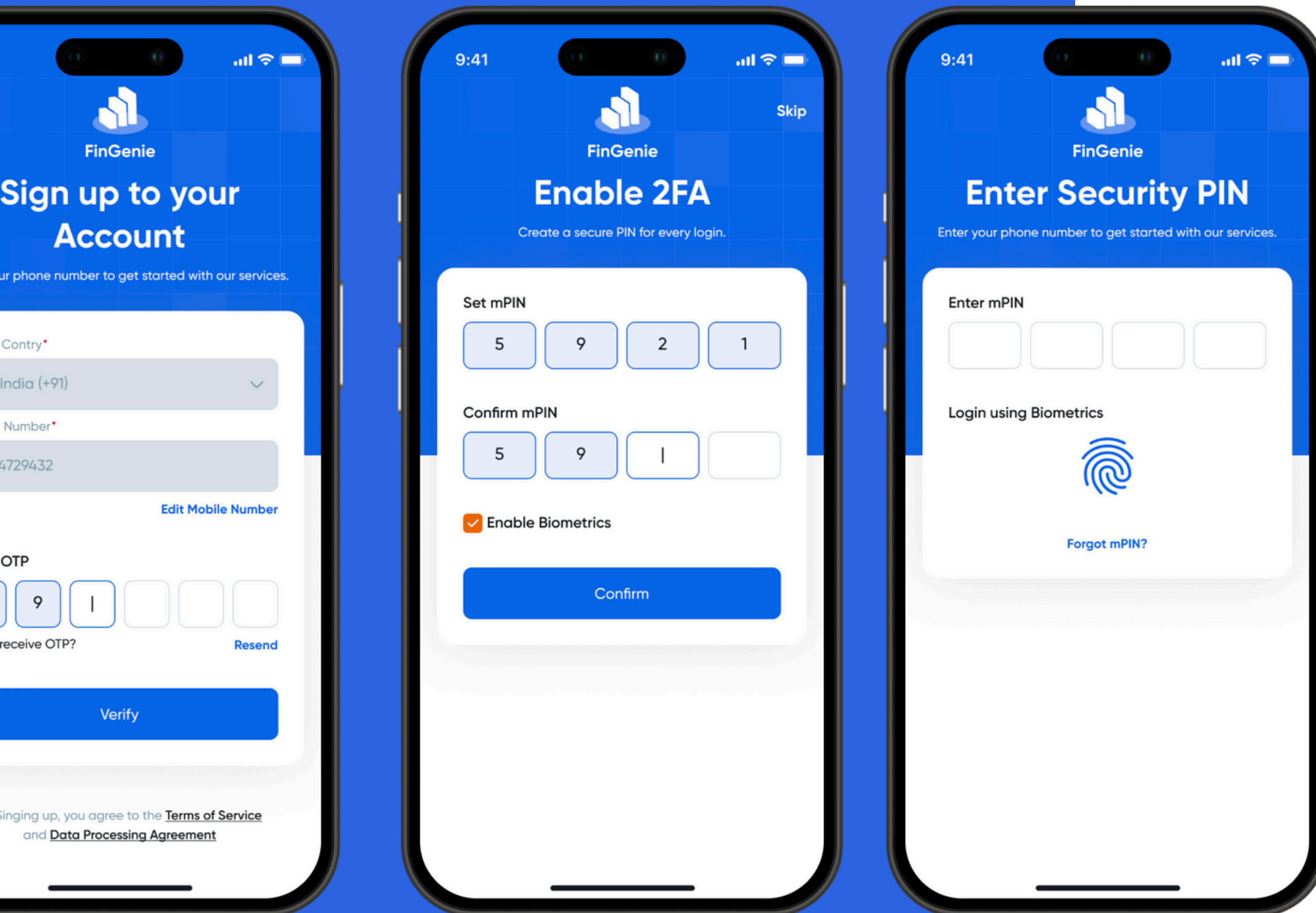
Sign-up/Login

01 For new registrations, users need to select their country code and enter their mobile phone number. An OTP will be sent to the entered number. After entering the OTP, users will proceed to the "Set mPIN" screen

02 Once registration is complete, users will be redirected to the user details page to fill in their basic information.

03 For login, users need to enter their mPIN. Additionally, biometric options such as face unlock and fingerprint recognition are available.

Dashboard

01
After completing the registration process, users will be redirected to the Dashboard screen, where they need to enter their current balance. This balance will serve as the base value, allowing users to add transactions thereafter.

02
The Dashboard displays the current balance and includes donut charts that visually represent total income and expense categories. Users can compare their income and expenses on a monthly basis, with the ability to view data for up to four months.
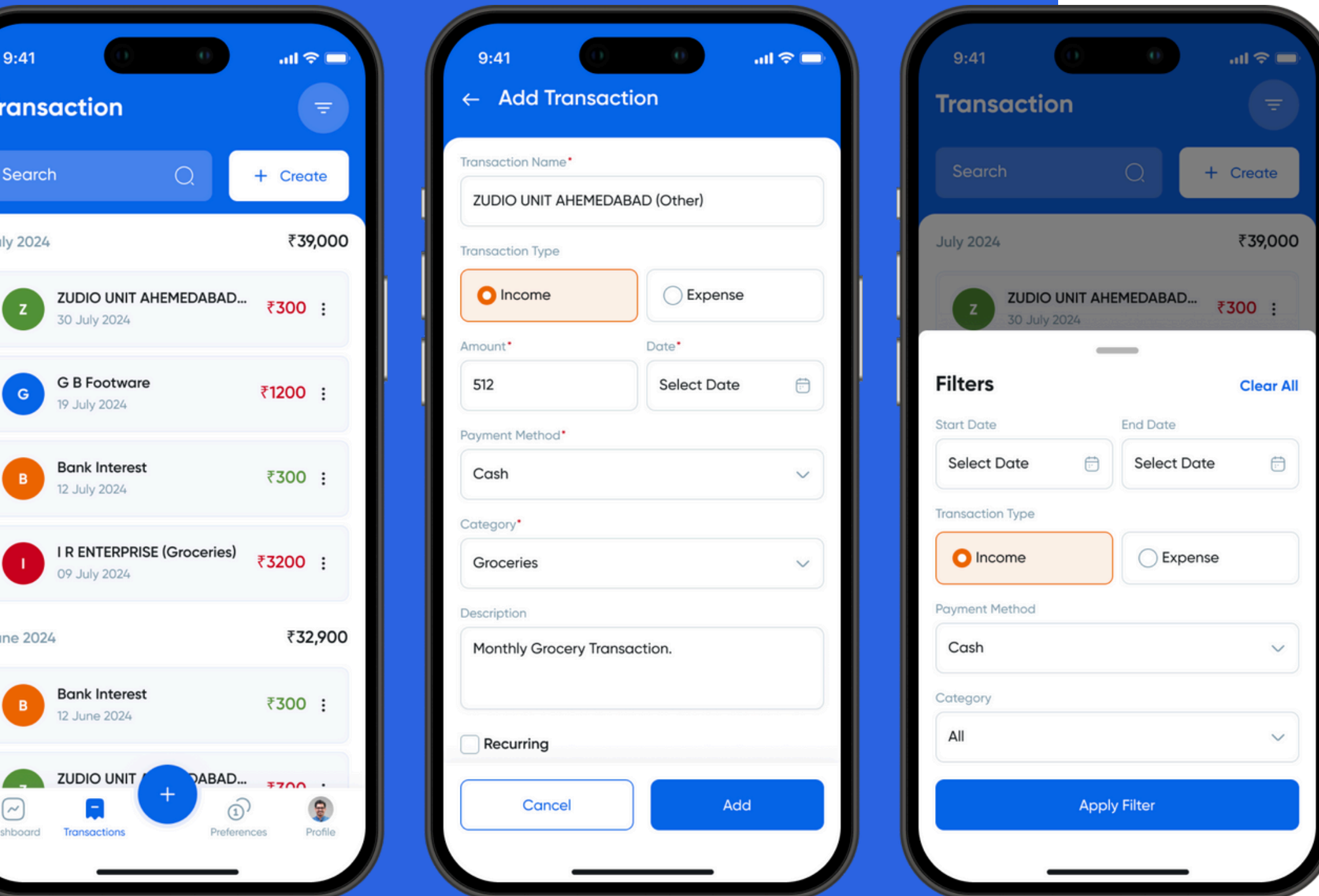
Transactions

01 The Transactions feature allows users to categorize and record their income and expenses. The listing page displays transactions on a month-by-month basis, with filter options available to quickly locate specific transactions.

02 Users can add, edit, and delete transactions, but transactions from previous months cannot be edited or deleted. Each deletion action will prompt the user for confirmation.

Preferences

01 This is the main module of the application. To set preferences, users need to provide information about their monthly income, family members, random expenses, and answer some investment assessment questions.

02 Based on this information, the AI will analyze the data and generate a savings/expenses report. Users can view summary reports within the application, and they can also download detailed reports in PDF or Excel format.

03 The savings/expenses report will identify areas where users can save money. The investment suggestion report will recommend types of investments, along with the expected profit percentage and profit amount for specific years.

Application Advantages

01 FinGenie provides personalized financial advice through AI-generated reports based on user transactions, expenses, and answers to specific questions, ensuring tailored investment suggestions.

02 The application features a comprehensive dashboard with visualizations for comparing income and expenses over several months, aiding users in better financial planning.

03 Users can easily manage their finances with the transaction module, which allows for the addition, editing, and deletion of income and expenses, with secure confirmation for deletions.

04 The AI analyzes user data to generate detailed savings and expense reports, as well as investment recommendations, which can be viewed within the app or downloaded in PDF or Excel format.

Portfolio Section
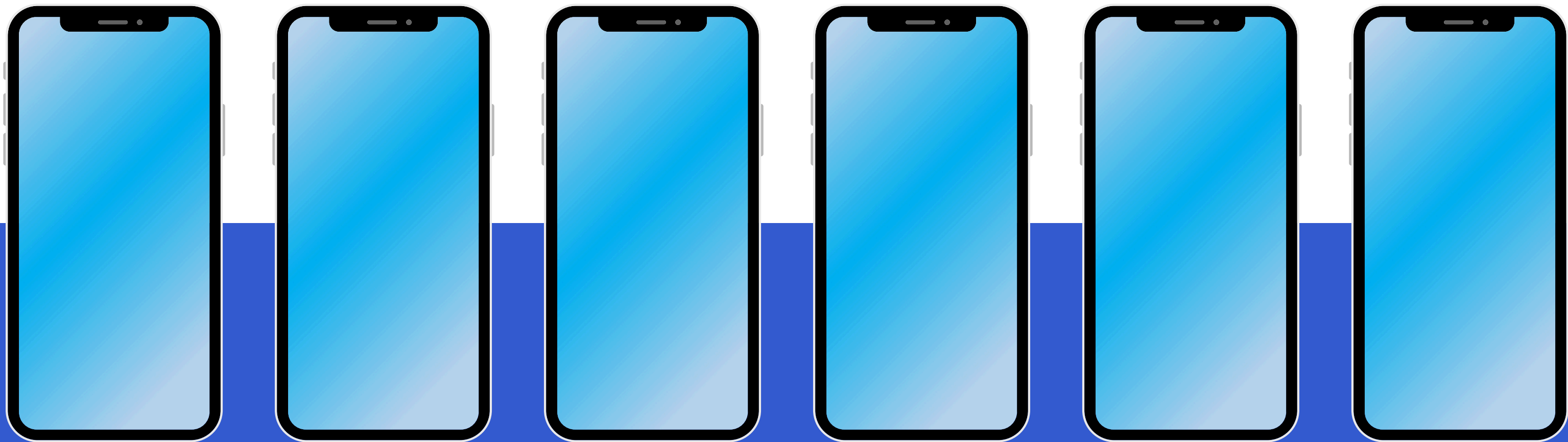
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Menu Display

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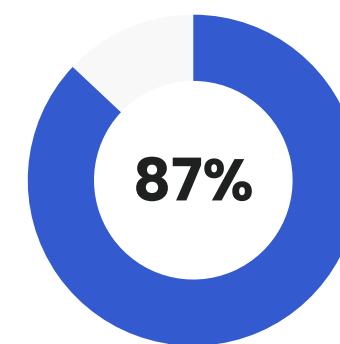
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Update 01   **Update 02**   **Update 03**

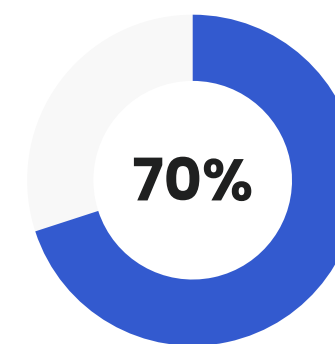Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut 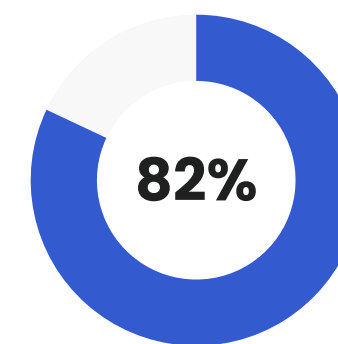enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat

Future Enhancements

01 Upload PDF Transactions: Users will be able to upload bank statement PDFs to automatically import transaction data.

02 Investment Suggestions: The system will provide tailored investment suggestions for stocks, and gold bonds. We plan to integrate multiple APIs to fetch real-time investment data and recommendations.

03 Bank Transaction Sync: Users can select their bank to sync transactions directly through the bank's API, providing a seamless and secure read-only access to their financial data.

04 Add Family Members: Users can include family members, adding their income and expenses. The system will then provide tailored savings and expense insights, as well as investment recommendations.

05 Refer and Earn: Users can invite friends to join the platform and earn cashback rewards for successful referrals.

06 Tax Saving Suggestions: The application will offer tax-saving advice tailored to the user's country, utilizing integrated country-specific tax APIs.

07 AI Chatbot: An AI-powered chatbot will be available to answer user questions and provide assistance within the app.

08 Goal Setting and Tracking: Users can set financial goals (e.g., saving for a vacation, buying a car) and track their progress towards these goals.

09 Multi-Currency Support: Allow users to manage finances in multiple currencies, providing automatic conversion rates and insights on foreign transactions.

10 Customizable Dashboards: Allow users to customize their dashboard to show the most relevant financial information at a glance.

Contact Us

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Application Features

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Thank You