



Asesor

FINANCIERO

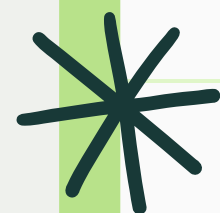


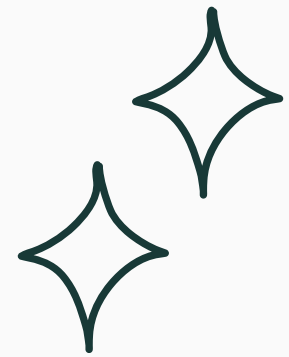
Realizado por Celeste Villaverde



OBJETIVO

Dar sugerencias de inversion de renta variable, dada la cantidad de dinero a invertir y el tiempo de inversion (debe ser mayor a 3 años)





CAPAS DE INVERSION



1. Fondo de emergencia
2. PPR (Plan Personal de Retiro)
3. Inversiones con ingresos pasivos
4. Inversiones de renta variable
5. Inversiones alternativas



```
# Financial advisor
import os
from dotenv import load_dotenv
from groq import Groq

DOTENV_PATH = "./.env"
load_dotenv(DOTENV_PATH)
API_KEY = os.getenv("API_KEY")

money_to_invest = "200 dollars"
time_to_invest = "7 years"

client = Groq(
    api_key=API_KEY,
)

prompt = f"""Act as a financial advisor. Make suggestions of how to invest {money_to_invest} in ETF's in GBM.
Consider that the money will be invested during {time_to_invest}.
Take into account the price of each ETF and try to spend all the money."
Return the output in json format. Return the ETF to invest and the quantity to invest."
"""

chat_completion = client.chat.completions.create(
    messages=[
        {
            "role": "user",
            "content": prompt,
        }
    ],
    model="llama-3.3-70b-versatile",
)

print(chat_completion.choices[0].message.content)
```

```
{
  "investmentStrategy": {
    "initialInvestment": "$200",
    "investmentHorizon": "7 years",
    "etfs": [
      {
        "name": "EWW (iShares MSCI Mexico ETF)",
        "quantity": 1,
        "pricePerUnit": "$25"
      },
      {
        "name": "ILF (iShares Latin America 40 ETF)",
        "quantity": 4,
        "pricePerUnit": "$20"
      }
    ],
    "remainingBalance": "$95"
  },
  "suggestion": "Consider adding another ETF or keeping the remaining $95 for future investments or adjustments to maintain diversification and optimize returns."
}
```

TRABAJO A FUTURO



- Incluir información actual e histórica de ETF's
- Incluir perfil de riesgo del inversionista
- Considerar historial de inversiones pasadas.





Muchas
GRACIAS

