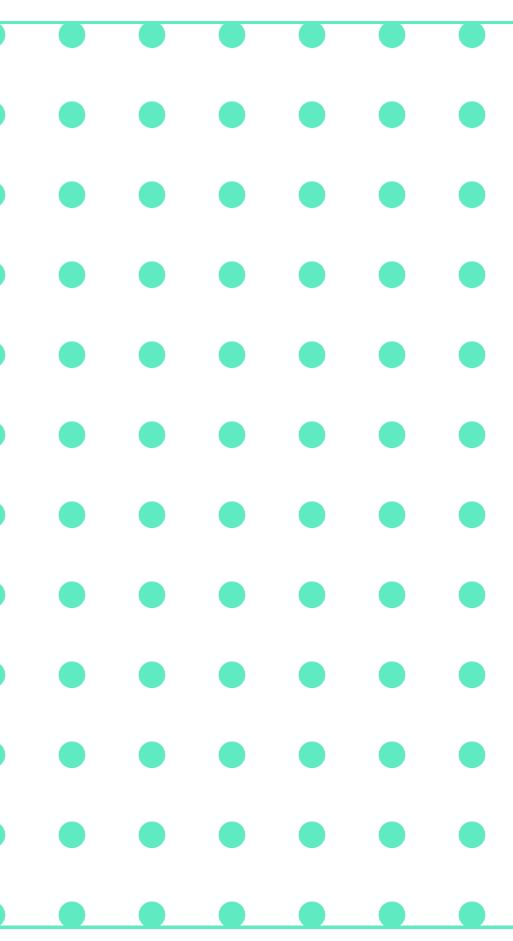


The Financial Pathway Tailored For You

Alberto Toia, Gloria Desideri, Giulia Talà, Simone Zani

The Problem



Lack of financial literacy cost adults at least \$10,000 in 2023

Source: CNBC

48%

Financial Illiterates

79%

Financial Literates
that do not make
profit

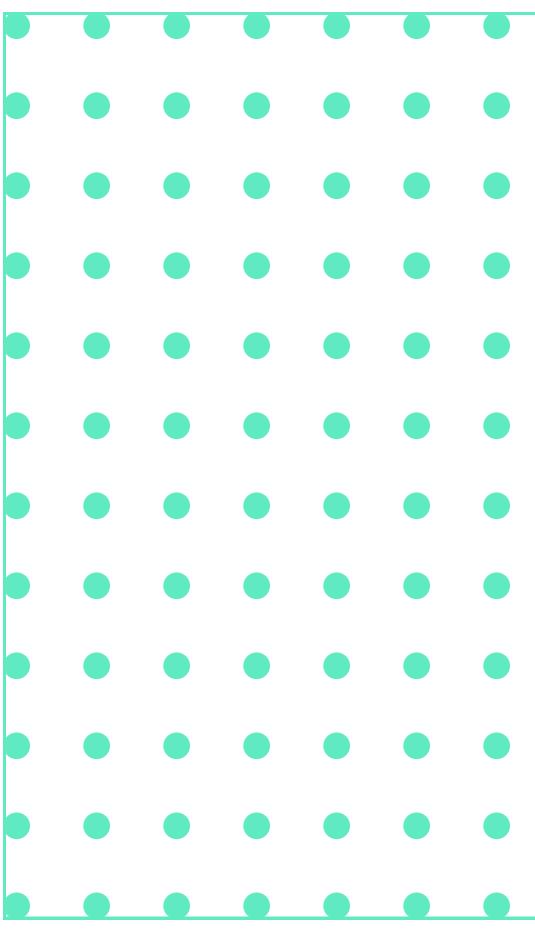
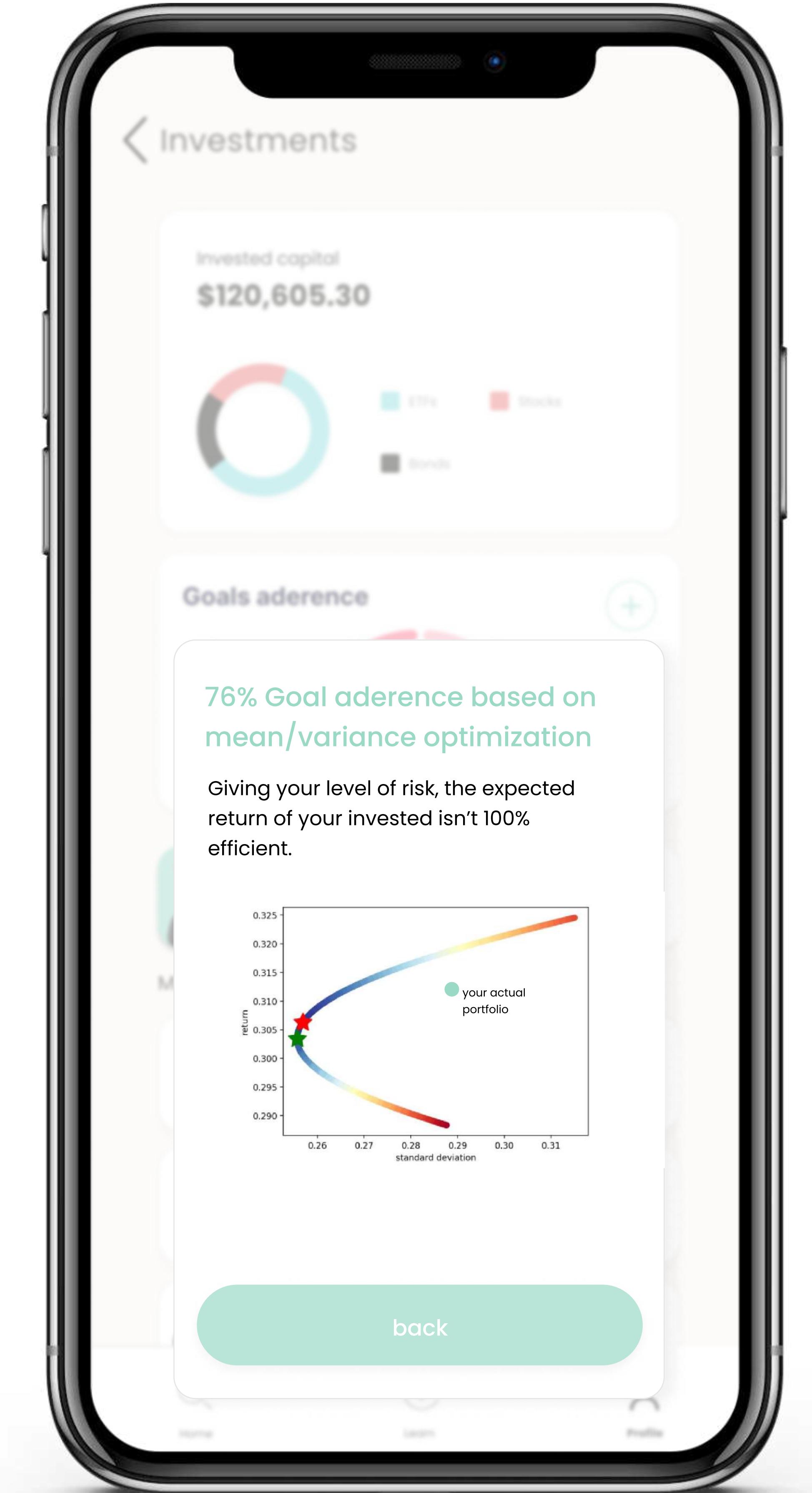
The **Solution**

**Guidance through wise
financial decisions
in everyday life**

360° view of your financial situation

Goals-oriented approach

Complexity made simple



Assessment Test

**FinBro needs to
get to know you better**

The image shows two smartphones side-by-side, both displaying the FinBro mobile application. The left phone's screen features a title 'What Are You Interested In?' with a subtitle asking about interests, followed by six category buttons: 'Passive Investing' (highlighted with a green border), 'Active Investing', 'Trading', 'General Learning' (highlighted with a green border), 'Saving More', and 'Financial Planning'. A 'Next' button is at the bottom. The right phone's screen displays a section titled 'Tell us more about yourself!' with three input fields for monthly income, monthly spending, and monthly investment. Below this is a 'Select your financial goals' section with four goal categories and their corresponding input fields. Further down are sections for 'Financial instruments:' (asset classes) and 'Investing questions'.

What Are You Interested In?

Please tell us a bit more about yourself and who you are, selecting topics you're interested in

Passive Investing Active Investing

Trading General Learning

Saving More Financial Planning

Next

Tell us more about yourself!

What is your current average monthly income?
Example: \$4,400

How much do you typically spend per month?
Example: \$1,600

How much do you invest a month (if any, otherwise 0)?
Example (1): \$800

Select your financial goals

Select what you are interested in:

Invest more money
How much do you want to invest, montly?

Early Retirement
At what age would you retire?

Upgrade your investing strategies
What's your ideal spending percentage?

Save more money
What's your ideal spending percentage?

Financial instruments:

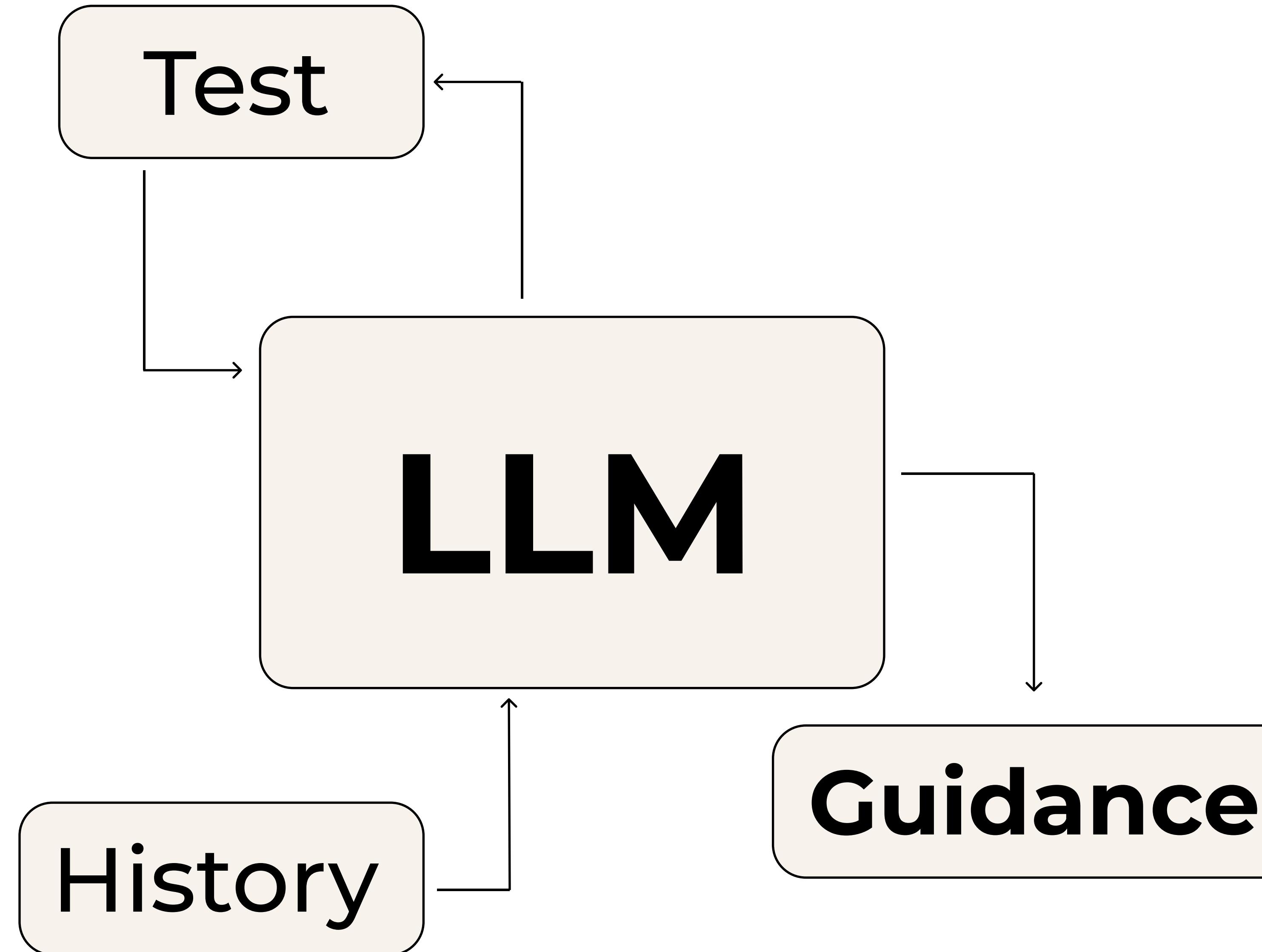
Select asset classes you're familiar with:

Stocks
 Bonds
 ETFs
 iBonds
 Commodities (gold, silver, corn, oil)
 Options and other derivatives
 Real Estate
 Cryptocurrencies

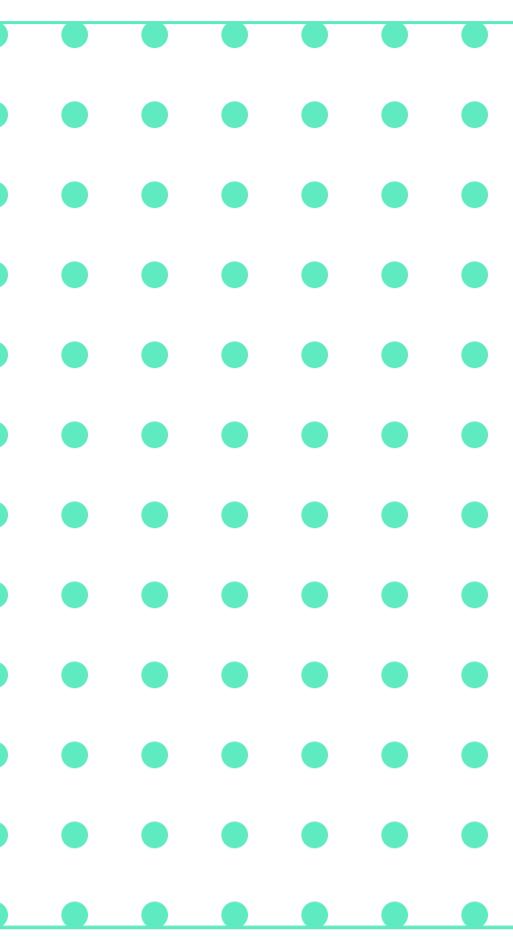
Investing questions

Suppose you have a portfolio exposed in US market. You read in

Financial Planning

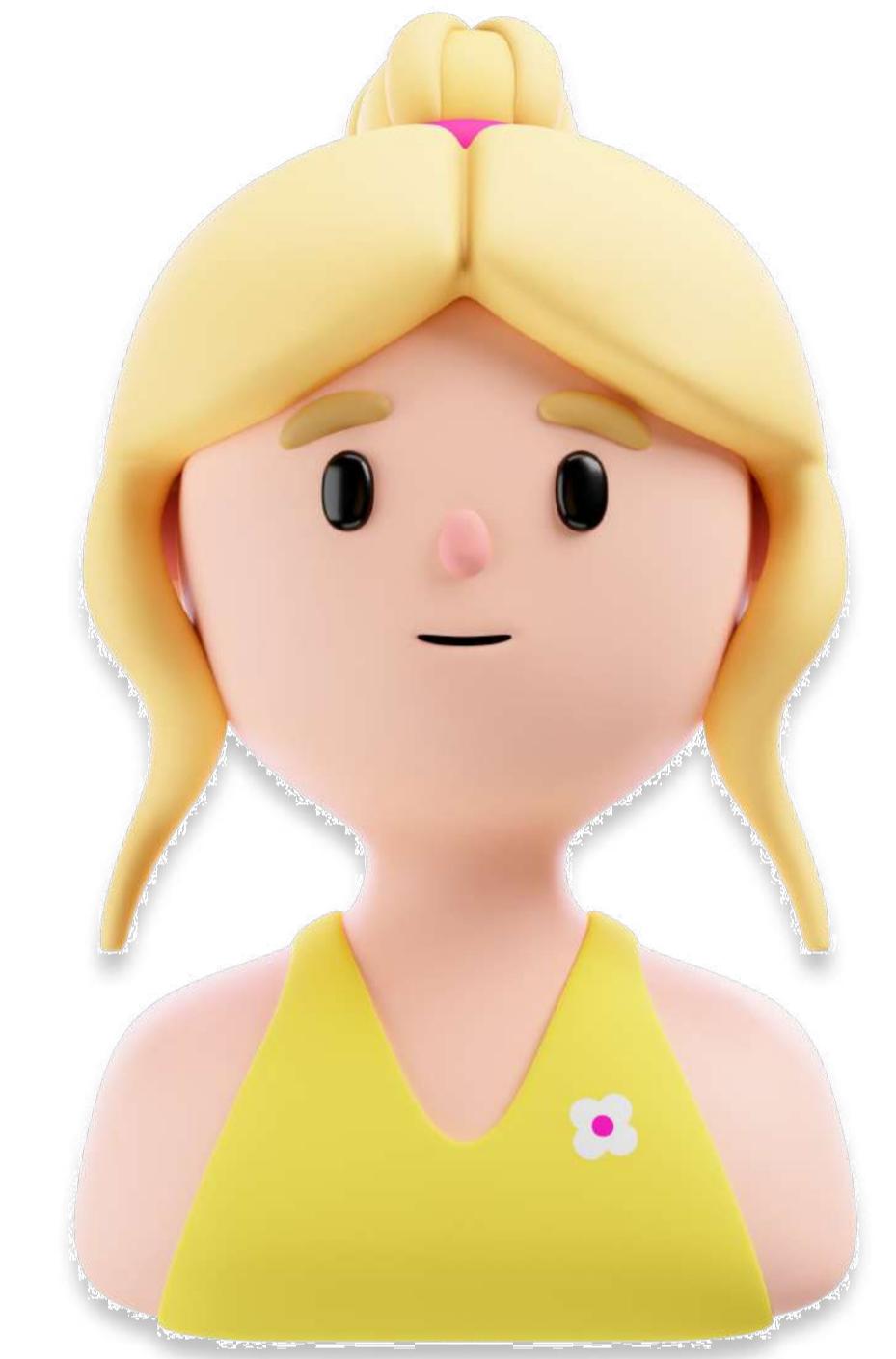


Meet the Bros



Investbro

Investment and Learning
AI -Assistant



Spendsis

Spending and Savings
AI-Assistant



Macrobro

New and Economics
AI -Interpreter

Product Features

- Customized answers produced by LLM for all type of user levels.
- Details depth based on user experiences and knowledge.
- Data security.
- Guided and goals-oriented learning system.
- Solutions proposed are based on financial objective theories.
- Actively retrieving learning system.
- Syncronized data from all the intermediates.



FinBro Challenge

Learning through effective techniques, such as the Leitner method while you earn brocoins

The image shows two smartphones side-by-side, both displaying the FinBro Challenge mobile application.

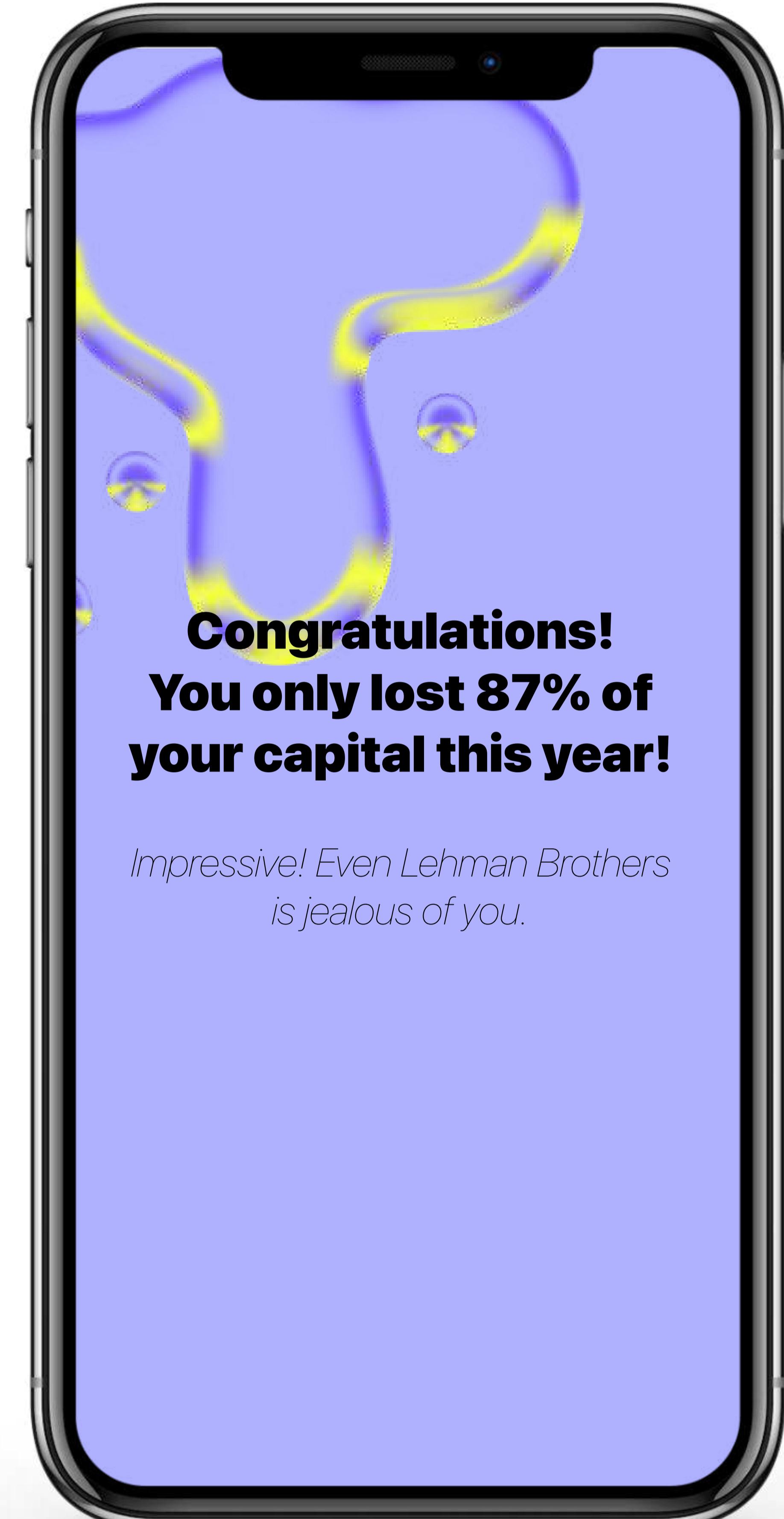
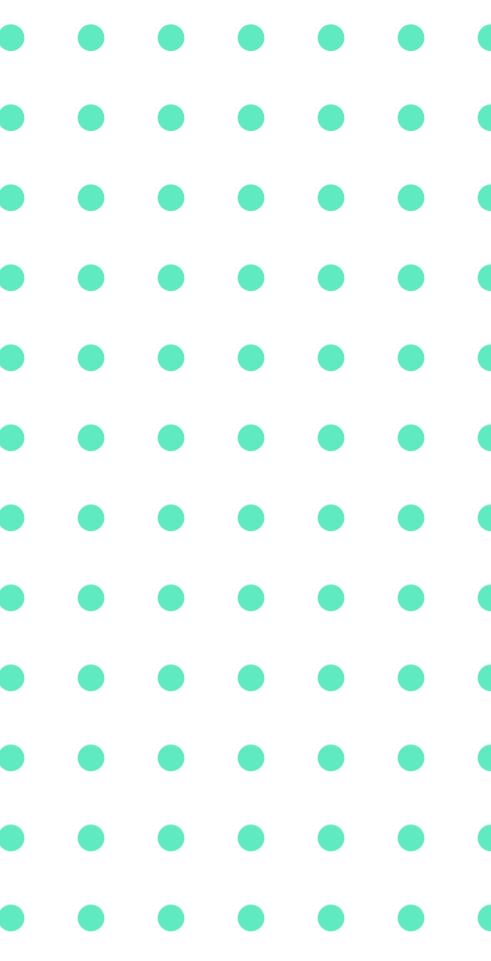
Left Phone Screen (Learning Tab):

- Header:** Learning
- User Info:** 217 brocoins
- Search Bar:** Search for a topic
- Continue Watching:**
 - Modern Portfolio Theory (MPT) - 78% completion
 - Volume spread analysis - 37% completion
 - Capital allocation
- Suggested for you:**
 - What happened in 2008? (Easy)
 - Accumulating vs Distributing ETFs (Easy)
 - Value stocks
- Completed:**
 - Bonds ladder
- Bottom Navigation:** Home, Learn, Profile

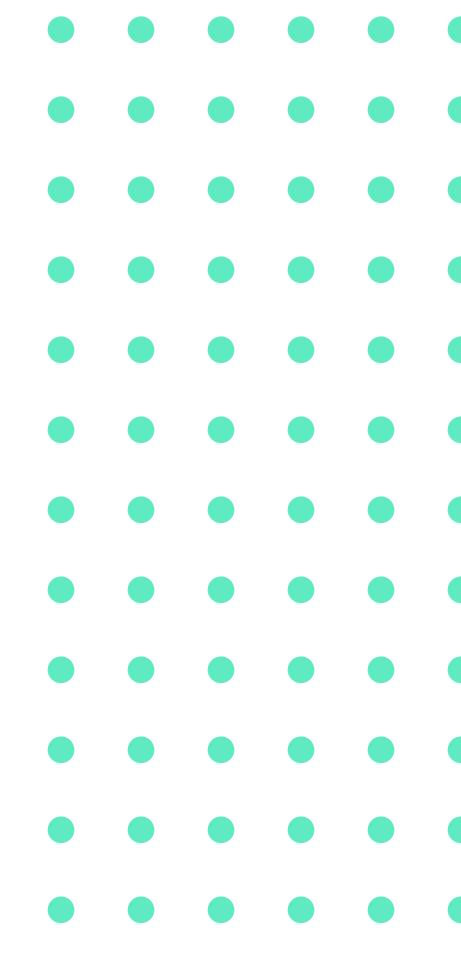
Right Phone Screen (LeaderBoard Tab):

- Header:** LeaderBoard
- Rankings:**
 - 1. Ben (1470 brocoins)
 - 2. Frank (1340 Pts)
 - 3. James (1202 Pts)
- My Investments:**
 - iShares IWDA by iShares Core MS... (▲ \$505.30 (10.3%))
 - Tesla Inc. TSLA (Tesla Inc.) (▼ \$103.20 (0.3%))
 - CLM
- Bottom Navigation:** Home, Learn, Profile

Financial Wrapped

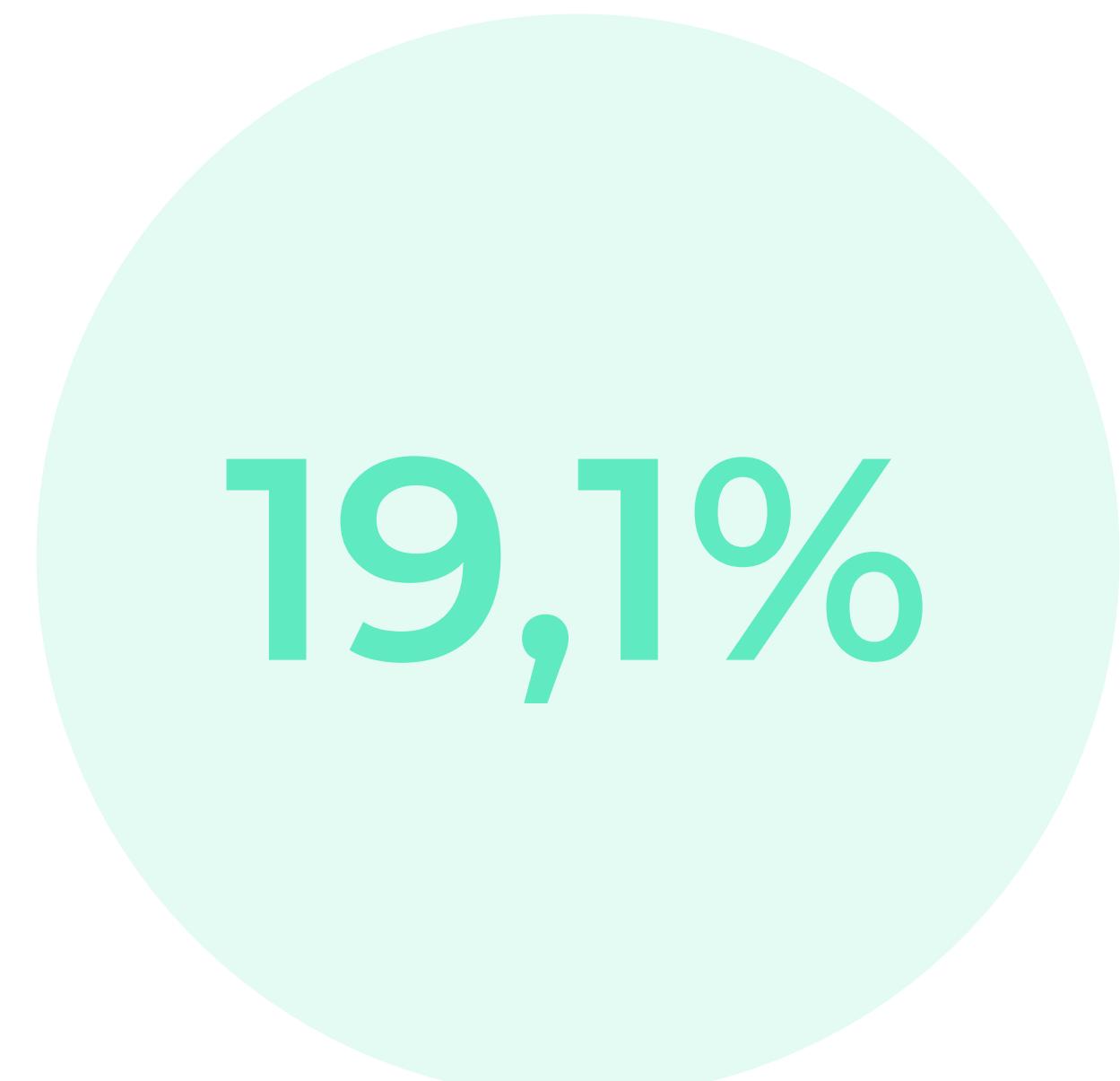


Market Opportunity



CAGR in FinTech

The compound annual growth rate is the annualized average rate of revenue growth, in fintech industry from 2023 to 2028



CAGR in AI

The compound annual growth rate is the annualized average rate of revenue growth, in AI industry from 2023 to 2032



NPV

Net present value is the difference between the present value of cash inflows and the present value of cash outflows over a period of time

Read more about the project...



Thank you for listening!

