

PFB task brief :

Background:

Imagine a fast paced hedge fund firm where professionals sift through vast amounts of financial research materials to uncover insights that drive critical decisions. The sheer volume and complexity of this information can be overwhelming. To address this, you are tasked to envision a cutting-edge digital web platform that serves as a comprehensive repository for financial research and analytics. This platform will centralize all necessary research materials and leverage advanced AI features to enhance search, analysis, and decision-making processes for various stakeholders, including Financial Researchers, Financial Operations, Quantitative Analysts, Qualitative Analysts, Traders, and Portfolio Managers. The goal is to develop an intuitive platform that transforms how hedge fund professionals search for, analyze, and act on financial research materials, fostering collaboration and enhancing decision-making processes.

Problem Statement:

The platform should address the following key areas:

- * AI-Driven Search and Analysis: Implement natural language search, predictive analytics, and data visualization to help users quickly locate relevant reports, forecast trends, and identify insights. This will enable users such as Financial Researchers and Quantitative Analysts to conduct deeper analysis efficiently.

- * Personalized Insights and Recommendations: Provide tailored insights based on user interactions and historical data, ensuring that each user's experience is optimized for their specific needs.

- * Automated Summaries and Reporting: Generate automated summaries and reports from complex research documents, enabling Financial Operations to ensure material integrity and automate report generation, while Traders receive real-time alerts for informed decision-making insights as signed off by Financial Research.

- * Seamless Collaboration: Facilitate the sharing of insights and research findings and support real-time discussions with integrated communication tools, enhancing decision-making across all stakeholders and fostering a collaborative environment.

- * Data Integration: Enable the integration of various external data sources to enrich the repository, allowing all stakeholders to access a more comprehensive set of information for their analyses.

Feel free to consider any additional use cases that you see relevant.

Deliverables:

Your submission can include (but is not limited to):

* Stakeholder Understanding (feel free to document your assumptions here)

- * Ideas
- * Sketches
- * Storyboards/Workflows
- * Wireframes
- * Mockups

You will be expected to present your work in a **10 min slot**, followed by a **5 min Q&A**.

Format: **Single PDF file within 15MB**. Do not send zip files.

Naming Convention : Full Name_course (Eg: John Doe_Mdes.)

Deadline : **28th November, 2024 (4:00 PM)**

Expectation:

Your submission will be evaluated based on how well it addresses user needs and pain points, the originality and creativity of the solutions, ease of navigation and information architecture, the quality and attention to detail in wireframes, mockups, and interaction design. Additionally, we will consider your design thinking, problem-solving skills, and understanding of usability concepts.