InvestIQ User Manual

Introduction

InvestIQ is an AI-powered investment assistant designed to analyze stock market trends, process real-time financial news, and provide personalized investment insights and risk alerts. Unlike traditional investment platforms that only offer raw data and generic analytics, InvestIQ leverages AI-driven time series analysis and natural language processing to deliver real-time, context-aware financial recommendations tailored to your personal financial goals.

Getting Started

Account Setup

1. **Access the App**: Navigate to the InvestIQ landing page and click "Enter App" to access the dashboard.
2. **Profile Setup**: Visit the Profile section to configure your:
    - Investment preferences
    - Risk tolerance
    - Investment goals
    - Investment horizon
    - Initial investment budget
    - Monthly contribution amount

Navigating the Interface

InvestIQ features an intuitive sidebar navigation with the following sections:

- **Dashboard**: Overview of your portfolio, market trends, and latest news
- **Portfolio**: Manage your investment holdings
- **Stocks**: Track stock market data and manage your watchlist
- **Recommendations**: View analyst recommendations for popular stocks

Dashboard

The Dashboard provides a comprehensive overview of your investment status:

Main Features:

- **Portfolio Value**: Total value of your investments

- **Total Gain**: Overall profit/loss on your investments
- **Positions**: Number of stocks in your portfolio
- **Performance Chart**: Visual representation of your portfolio performance over time
- **IPO Calendar**: Upcoming IPOs in the next 30 days
- **Top Holdings**: Your largest investment positions
- **Watchlist**: Quick view of stocks you're monitoring
- **Latest News**: Recent market news and updates

Using the Dashboard:

- Use the time range selector (1D, 1W, 1M, 3M, 1Y, All) to view portfolio performance over different periods
- Click on watchlist items to get more detailed information
- Read the latest news to stay informed about market developments

Portfolio Management

The Portfolio section allows you to manage your investment holdings:

Main Features:

- **Portfolio Value**: Total value with percentage gain/loss
- **Performance Chart**: Visual representation of portfolio growth
- **Holdings Table**: Detailed view of each stock position including:
    - Symbol and company name
    - Number of shares
    - Average cost per share
    - Current price
    - Total value
    - Weight in portfolio
    - Gain/loss amount and percentage

Managing Your Portfolio:

- **Add Position**: Click "Add Position" to add a new stock to your portfolio
    - Enter the stock symbol (or search for it)
    - Enter the company name
    - Select purchase date
    - Enter number of shares
    - Enter average cost per share
- **Remove Position**: Click the trash icon next to any holding to remove it
- **Refresh Data**: Click "Refresh" to update all stock prices and calculations

Stock Market Tracking

The Stocks section allows you to monitor the broader market:

Main Features:

- **Stock Search**: Find stocks to add to your watchlist
- **Watchlist**: Track stocks you're interested in
- **Market News**: Latest financial news articles

Using the Stock Tracker:

- **Search for Stocks**: Enter a symbol or company name in the search bar
- **Add to Watchlist**: Click on a search result to add it to your watchlist
- **Edit Watchlist**: Click "Edit Watchlist" to remove stocks
- **View News**: Browse the latest market news related to your interests

Analyst Recommendations

The Recommendations section provides professional insights on popular stocks:

Main Features:

- **Stock List**: Collection of popular stocks with consensus ratings
- **Recommendation Details**: Breakdown of analyst opinions
- **Recommendation Chart**: Visual representation of analyst sentiment
- **Historical Data**: Previous recommendation trends

Using Recommendations:

- Click on any stock to view detailed analyst recommendations
- View the consensus rating (Strong Buy, Buy, Hold, Sell, Strong Sell)
- Analyze the distribution of analyst opinions in the chart
- Review historical recommendation data to identify trends

Deposit Funds

To add funds to your account:

1. Click the "Deposit" button in the top-right corner
2. Enter the amount you wish to deposit
3. Select your preferred payment method (Bank Transfer or Credit Card)
4. Complete the transaction

Settings and Preferences

The Profile section allows you to customize your experience:

Investment Preferences:

- **Investment Goal**: Choose between Retirement Planning, Wealth Growth, or Income Generation
- **Risk Tolerance**: Set as Conservative, Moderate, or Aggressive
- **Investment Horizon**: Choose Short-term, Medium-term, or Long-term
- **Tax Bracket**: Select your current tax bracket for tax-optimized recommendations

Tips for Getting the Most from InvestIQ

1. **Complete Your Profile**: Ensure your investment preferences are up-to-date for the most relevant recommendations
2. **Regularly Update Your Portfolio**: Keep your holdings accurate for better performance tracking
3. **Monitor Your Watchlist**: Use the watchlist to track potential investments before committing
4. **Stay Informed**: Check the news section regularly for market updates
5. **Review Recommendations**: Consider analyst insights when making investment decisions

Troubleshooting

- **Data Not Loading**: Click the refresh button to reload data
- **Portfolio Not Updating**: Ensure you've saved your changes after adding or removing positions
- **Search Not Working**: Check your internet connection and try again
- **Performance Issues**: Try clearing your browser cache or using a different browser