# **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