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Vision Document Information (Specific to Risk Management):

*Current Risk Analysis Features*

- Different risk statistics (market, company-specific, liquidity, etc.)
- Display a warning pop-up (alert) if the risk level drops below the specified threshold
- Investment Horizons
- Scenario Analysis
  - Evaluate how a portfolio or investment would perform under different market conditions
    - Extreme cases, quartiles, and mean
  - Custom Scenarios

*Potential New Risk Management Features*

- Determine the users' risk level of a portfolio using machine learning
- Understand users' risk tolerance by utilizing a Graph Database
- Recommend specific assets based on users' portfolio risk aversion

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Business Discussed:

- Let's imagine we are individual investors with zero experience → "We are starting from ground zero" ...What would be helpful for us? We discussed that our *End Goal* is to create and build an assessment (with there being three risk tolerance groups: risk averse, moderately risky, & very risk-concentrated).

To Discuss:

- What does the five-year plan look like for this project?
    - Build a potential strategic partnership in five, ten years down the road... Robinhood?
  - What innovations are there in emerging technologies?
  - Finding external grants, funding, other resources, etc.
  - The Bloomberg Terminal is a costly tool intended for professionals in the industry. On the other hand, we aim to develop a software tool tailored for everyday individual investors. ...How can we implement a system that takes advantage of Bloomberg's flaws?
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