

Assignment 3

MGMT 675: Generative AI for Finance

Exercise 9: Financial Data with MCP. Install the Alpha Vantage or Financial Modeling Prep MCP server in Claude Desktop. Use it to retrieve financial data for a company of your choice (e.g., income statement, balance sheet, or stock prices). Ask Claude to analyze the data and produce a summary table in Excel ([Exercise9.xlsx](#)). Submit screenshots showing (a) the MCP server in your config ([Exercise9-Screenshot1.png](#)), (b) the hammer icon with available tools ([Exercise9-Screenshot2.png](#)), and (c) the final Excel output ([Exercise9-Screenshot3.png](#)).

Exercise 10: Browser Automation for Data Collection. Install the Browser-Use MCP server in Claude Desktop. Ask Claude to navigate to a financial website (e.g., Yahoo Finance or the SEC EDGAR site), extract a specific piece of data (e.g., the current market cap and P/E ratio for a company), and present it in a formatted response. Submit screenshots of the browser automation in action ([Exercise10-Screenshot1.png](#)) and the final result ([Exercise10-Screenshot2.png](#)).

Exercise 11: Portfolio Performance Report. Create a CSV file containing monthly returns for at least three funds over the past two years. Place it in a folder on your computer. In Claude Desktop's Cowork tab, point Claude at the folder and ask it to compute the Sharpe ratio for each fund, identify the top performer, and create an Excel spreadsheet with a summary table and a bar chart of the Sharpe ratios. Submit the CSV input ([Exercise11-Input.csv](#)), the Excel output ([Exercise11-Output.xlsx](#)), and a screenshot of the Cowork session ([Exercise11-Screenshot.png](#)).

Exercise 12: Multi-File Document Processing. Download [exercise2_invoices.zip](#) and extract it into a folder. In Cowork, ask Claude to read the invoice register (PDF), the payment log (xlsx), and the vendor disputes memo (docx). Have Claude match invoices to payments, apply dispute resolutions, and produce a reconciliation summary ([Exercise12-Reconciliation.xlsx](#)) with the total outstanding amount. Submit a screenshot of the Cowork session showing the steps Claude took ([Exercise12-Screenshot.png](#)).

Submission. Upload a zip file containing each file requested above with the filename shown in parentheses. Label the zip file “Assignment3”.