Assignment 3

MGMT 675: Generative AI for Finance

Exercise 7: 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 (`Exercise7.xlsx`). Submit screenshots showing (a) the MCP server in your config (`Exercise7-Screenshot1.png`), (b) the hammer icon with available tools (`Exercise7-Screenshot2.png`), and (c) the final Excel output (`Exercise7-Screenshot3.png`).

Exercise 8: 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 (`Exercise8-Screenshot1.png`) and the final result (`Exercise8-Screenshot2.png`).

Exercise 9: 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 (`Exercise9-Reconciliation.xlsx`) with the total outstanding amount. Submit a screenshot of the Cowork session showing the steps Claude took (`Exercise9-Screenshot.png`).

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