

Google Cloud Hackathon

HSBC Technology India

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Agenda

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Problem Statement

A bank uses an AI-driven solution to provide personalized financial advice, expense categorization, and document processing to its customers.

Document Processing

Customers upload financial documents (e.g., bank statements, tax forms) via a mobile app. Using Document AI, the system extracts key information like income and transactions.

This integrated AI system simplifies financial planning, helping users make better financial decisions.

Expense Categorization

The AI automatically categorizes transactions into groups (e.g., groceries, utilities) using a pre-trained model built with Vertex AI. This helps customers understand their spending patterns.

Personalized Financial Advice

Based on the categorized expenses and income data, the system provides real-time, tailored advice—such as budget recommendations or savings strategies—via a chatbot.



Impact

Enhanced Financial Awareness

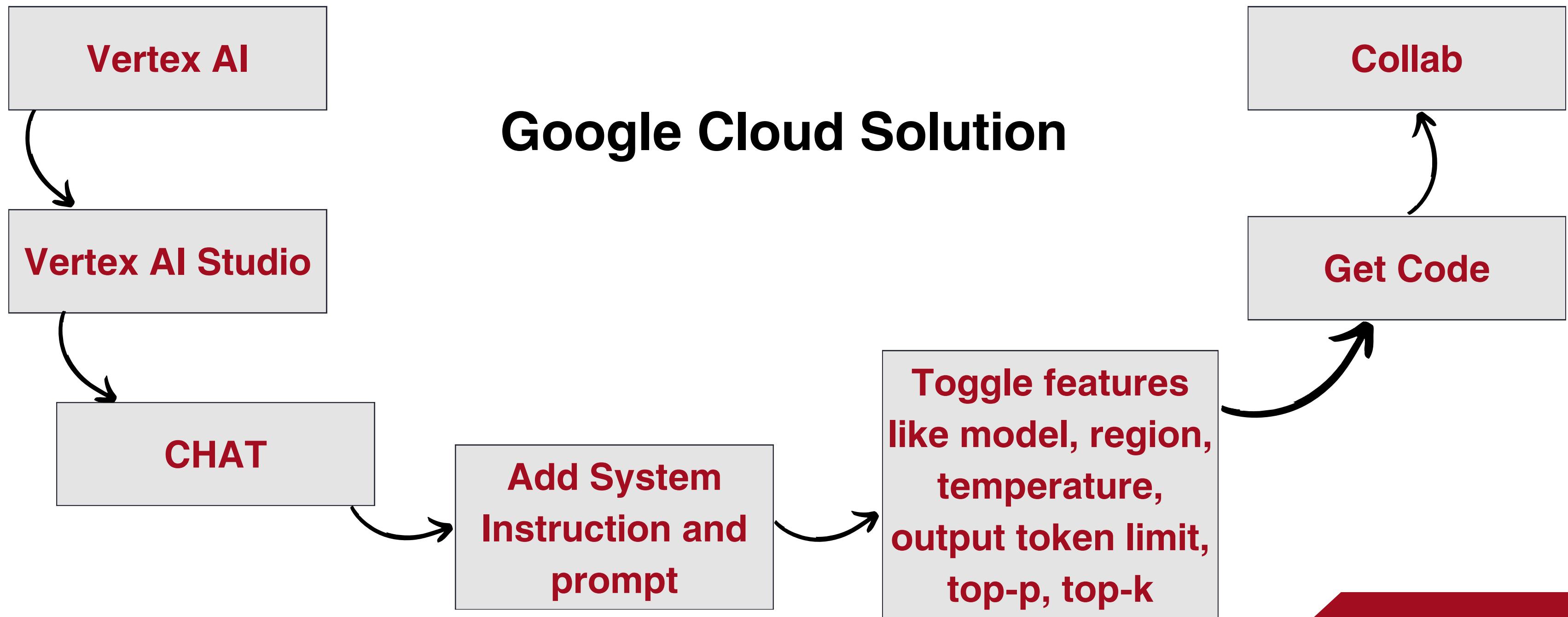
Improved Decision Making

Time Savings

Goal Achievement

Convenience

Flow Diagram



Solution

The screenshot shows the Google Cloud GenAI interface. At the top, there's a navigation bar with 'Google Cloud' and a dropdown menu showing 'qwiklabs-gcp-03-29a27e162fd1'. The main title is 'GenAI' with a search bar. Below the title are buttons for 'History', 'Notes', 'Clear Conversation', and 'API reference'. The main area has a header 'Classification 1' with a back arrow and a pencil icon. A 'System instructions' box contains the text: 'you are a helpful financial bot whose job is to categories expense into [shopping', 'education', 'travel', 'food', 'health', 'utility ...'] with an 'Edit' button. The 'USER' input says: 'I earn Rs80000 per month. I spent 200 on banana, 4000 on salon, 5000 on buying OTT subscription'. The 'AI' response starts with 'Let's break down your spending and create a plan to help you save more!' followed by a 'Expense Breakdown' section with a list: 'Food: ₹200 (Bananas)', 'Shopping: ₹4000 (Salon)', and 'Entertainment: ₹5000 (OTT subscriptions)'. It then lists 'Total Monthly Expenses: ₹9200' and 'Financial Advice' with several bullet points: 'Track Your Spending', 'Create a Budget', 'Prioritize Needs', 'Explore Affordable Alternatives', etc.

Google Colab Notebook Link:
[Click here](#)

Solution

System instructions

you are a helpful financial bot whose job is to categorize expense into [shopping', 'education', 'travel', 'food', 'health', 'utility ...

Edit

Saving Potential: By implementing these changes, you could potentially save around ₹6000-7500 per month.

Here's a possible budget breakdown:

Category	Allocation (₹)
Essentials	30,000
Savings	15,000
Debt Repayment	0
Discretionary Spending	35,000

Remember: This is just a sample budget. Adjust it based on your specific needs and priorities.

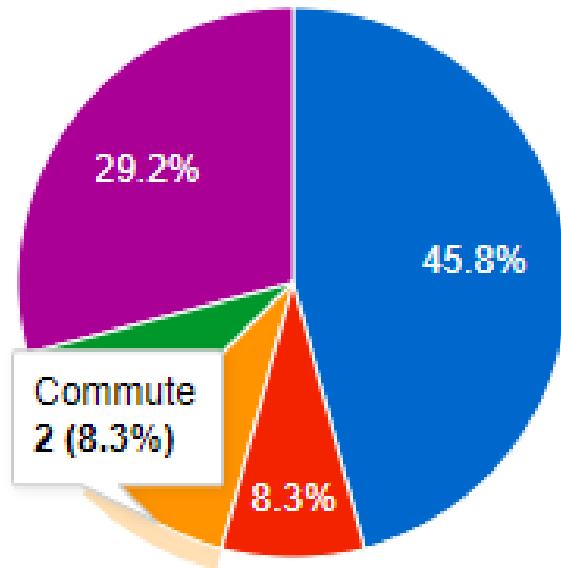
Important Note: It's great you're aware of your spending. By making small changes, you can significantly improve your financial health. Good luck!

Here's how to create a pie chart using Google Charts:

1. Go to Google Charts: <https://developers.google.com/chart>
2. Select "Pie Chart" from the list of chart types.
3. Enter your data:
 - Label: Savings, Investments, Rent, Leisure
 - Value: 50, 20, 15, 15 (representing percentages)
4. Customize: You can change colors, add titles, and adjust the chart's appearance.
5. Download as PDF: Once you're satisfied with the chart, click "Download" and choose "PDF" as the format.

This will give you a visual representation of your budget allocation in a PDF file.

Pie Chart - [view source](#)



- Work
- Eat
- Commute
- Watch TV
- Sleep



[more](#)

Thank You !

