

# Investment Thesis

## 1. Portfolio Strategy

This portfolio focuses on long-term growth opportunities in the global technology and AI sectors. The allocation across the United States, Hong Kong, and Japan provides diversified exposure to advanced and emerging markets. **Market Allocation:**

- 50% United States (Tesla, NVIDIA, AMD)
- 30% Hong Kong (Tencent, Alibaba)
- 20% Japan (SoftBank, Keyence)

**Risk Appetite:** Aggressive growth-oriented, accepting higher volatility in exchange for higher potential returns.

**Target Return:** 8–15% over the 3-week simulation period.

**Acceptable Drawdown:** Up to 10%, monitored through daily price and market sentiment evaluations.

## 2. AI Workflow Design

The investment strategy uses a Tier 2 coordinated AI system that includes three specialized agents: **Agent 1: Market Research Analyst (Gemini Advanced)**

- Analyzes company fundamentals, quarterly reports, and market trends.

**Agent 2: Fact Validator (ChatGPT / Claude)**

- Verifies financial data against Yahoo Finance and official investor materials.

**Agent 3: Portfolio Decision Maker (ChatGPT)**

- Recommends buy/sell decisions based on validated research and risk exposure analysis.

**Process:**

Research → Validation → Portfolio Decision → Human Approval → Trade Execution

## 3. Initial Stock Picks

The portfolio includes 7 positions reflecting strategic exposure to AI, chip manufacturing, and digital platforms. **United States:**

- Tesla: Exposure to electric vehicle innovation and autonomous driving.
- NVIDIA: Core AI hardware provider with strong market demand.
- AMD: Competitive semiconductor company driving AI computing hardware.

**Hong Kong:**

- Tencent: Leader in social media, cloud computing, and gaming ecosystems.
- Alibaba: Key player in e-commerce and cloud infrastructure in China.

**Japan:**

- SoftBank: Technology investment conglomerate with exposure to AI startups.
- Keyence: Global automation and robotics component manufacturer supporting industrial efficiency.

## 4. Risk Management Plan

**Diversification Rules:** Maintain 5–15 positions with geographic and sector diversification.

**Stop-Loss Triggers:** Consider reducing position size if individual stock declines exceed 8%.

**Daily Monitoring:** News and sentiment tracked using Yahoo Finance and market news feeds.

**Model Validation:** All AI-generated recommendations must be confirmed with at least one independent data source.