

FinBot

Presented by: Mehak Agrawal

Executive Summary

Project Goal

Build a bot that generates personalized company profiles, market reports, SWOT analysis, industry comparisons, and financial improvement recommendations

Why

Help businesses better understand their financial health and competitive position, addressing the current system's lack of private or industry-specific data that leads to shallow, generic, and often unreliable analysis

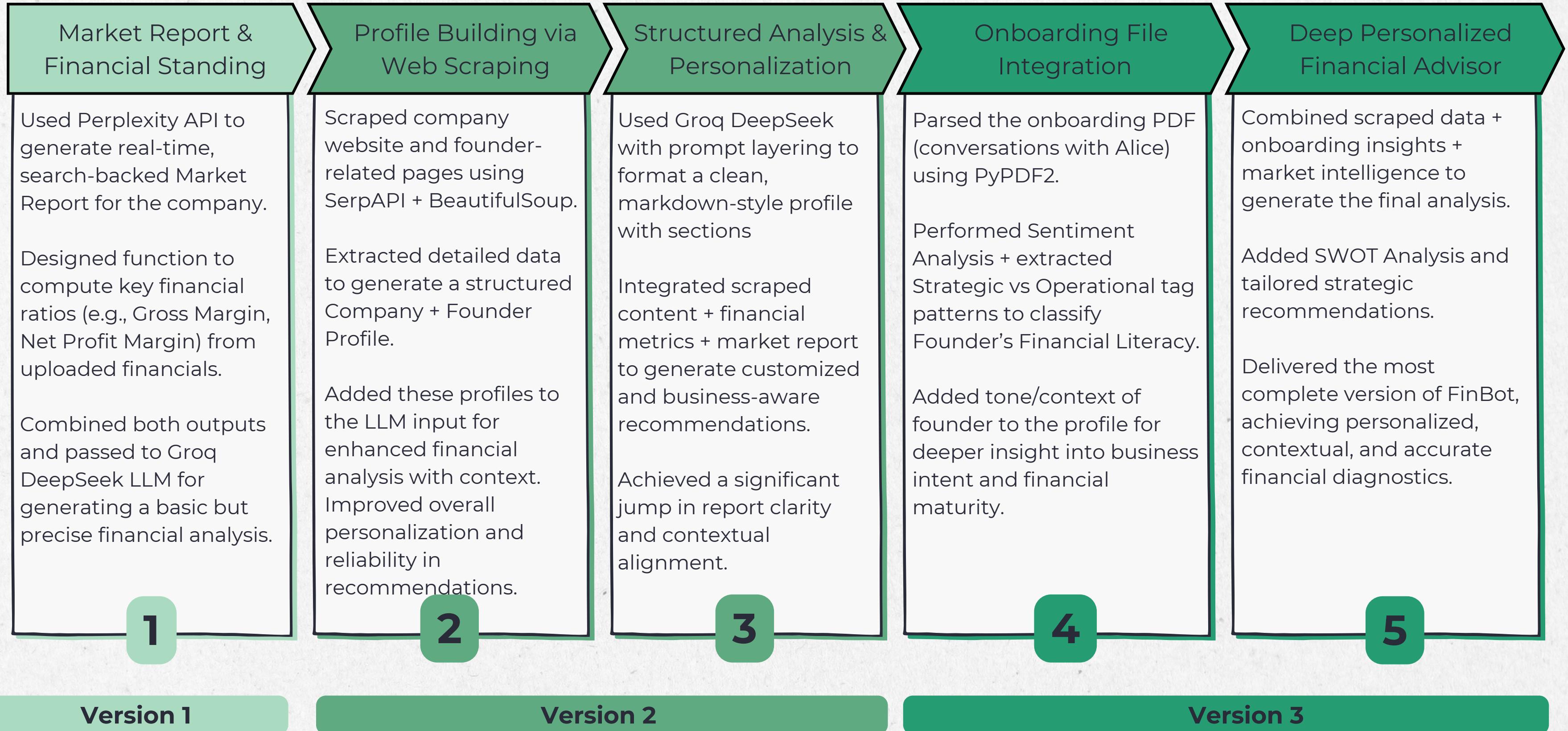
Approach

Combined public data scraping, onboarding file parsing, vector-based benchmarking, and LLM-powered prompt generation to create structured, insightful reports.

Result

Final output shows improved clarity, founder profiling accuracy, and actionable recommendations, while maintaining strong benchmarking and financial assessment quality

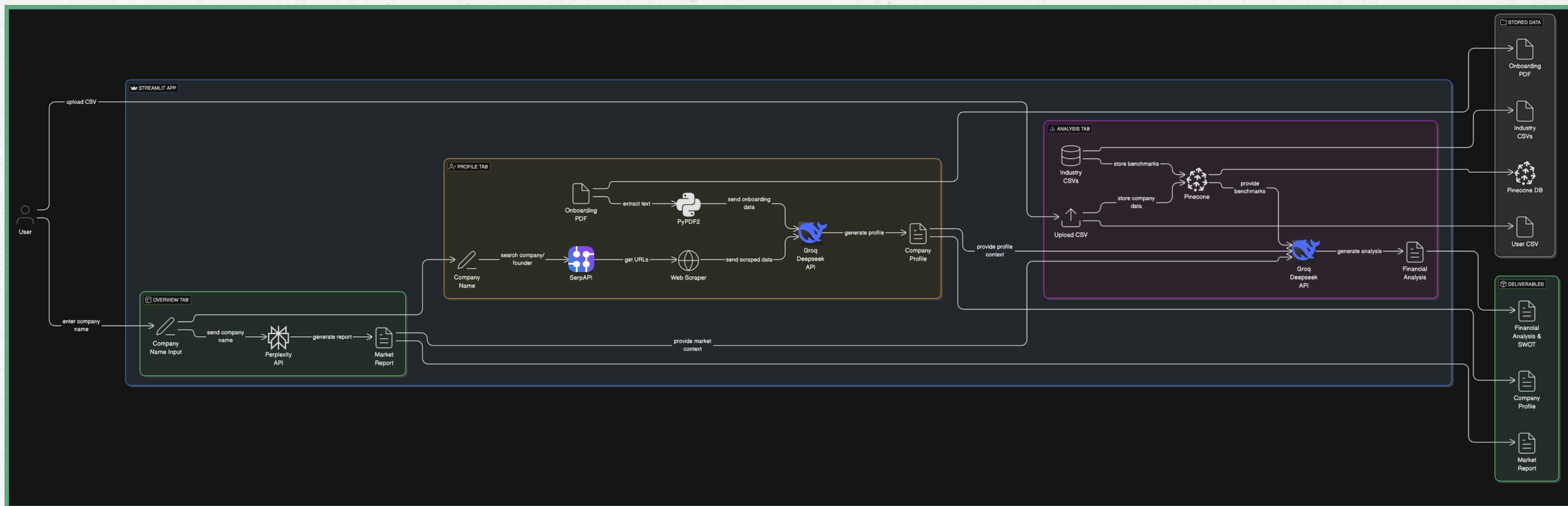
Major Milestones Achieved

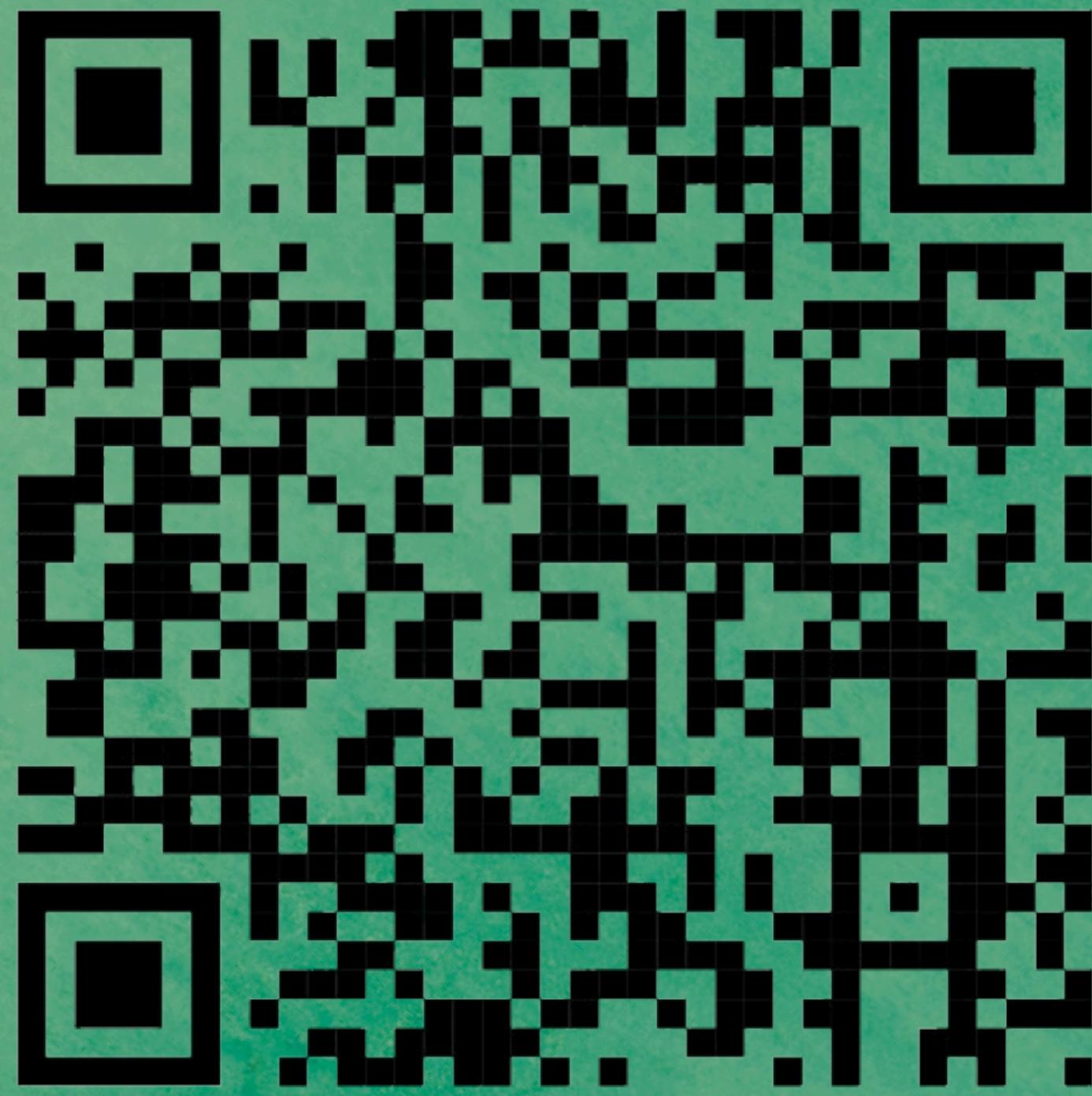


Deliverables and their Comparisons

Deliverables	Version 1 (Scraped Data but not included in Analysis)	Version 2 (Scraped Data + Profile Structuring)	Version 3 (Scraped + Onboarding Data)
<u>Market Report (via Perplexity API)</u>	Basic summary: Company Description, Product Focus, Mission	More structured: added some competitive highlights, company positioning	Now separated properly: Market Size, Growth, Competition, Future Trends
<u>Company Profile (including Founder Profile)</u>	Basic Company Info + Limited Founder Data: Scrapped website and founder pages; no structure	Structured Company + Founder Profile: Scrapped and organized into sections (Overview, Leadership, Financial Health)	Added onboarding file insights: founder financial literacy classification (Strategic/Operational)
<u>Financial Analysis (Financial Standing + Recommendations)</u>	Financial Standing Evaluation: Gross Margin, Net Profit Margin, Expense Ratios vs Industry Averages Strategic Recommendations: Basic financial suggestions (e.g., control costs, improve COGS)	Financial Standing Evaluation improved More detailed financial metric extraction and validation Strategic Recommendations: Broader recommendations based on financial gaps	Full Financial Analysis: Financial Standing + Detailed SWOT Analysis (Strengths, Weaknesses, Opportunities) + Highly specific Strategic Recommendations based on onboarding and market insights
<u>Personalization Level</u>	Low — only public scraped info; same template recommendations	Medium — customized profiles and recommendations based on richer scraping	High — Personalized to company's onboarding data, founder style, and market dynamics
<u>Overall Result</u>	Basic market report + Basic scraping + financial comparisons → Minimal personalization	Basic market report + Structured profiles + cleaner analysis → Moderate personalization	Full market report + financial analysis + SWOT + tailored advice → Full personalization & strategic financial advisory

Architecture





Scan for Github Repo

THANK YOU

