**Project Requirements Response – AI Investment Bot**

**A. Infrastructure Requirements**

* **AWS Account:** Yes, existing account and I ran these earlier and it is ready now (PS C:\Users\alras> aws configure
* AWS Access Key ID [\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*0843]: 593793060843
* AWS Secret Access Key [\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*ount]:
* PS C:\Users\alras> AWS configure
* AWS Access Key ID [\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*0843]: AKIAYUQGTB7VUCADSIPF
* AWS Secret Access Key [\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*ount]: 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
* Default region name [us-east-1]: us-east-1
* Default output format [json]: json
* PS C:\Users\alras> aws sts get-caller-identity
* {
* "UserId": "AIDAYUQGTB7VUWB323UCO",
* "Account": "593793060843",
* "Arn": "arn:aws:iam::593793060843:user/Investment"
* })
* **Billing/Admin Access:** I have full billing/admin access.
* **Preferred Region:** us-east-1 (for lowest costs).
* **Budget:** Comfortable with ~$75/month to start.
* **Separate Account?:** Use existing account for now
* **Domain & DNS:** Prefer custom domain → [tadaro.ai]. Registrar: [GoDaddy]. Planned URL: www.tadaro.ai
* **Security & Compliance:**
  + No strict compliance frameworks at MVP (not FINRA/SEC regulated yet).
  + Data storage: US acceptable for now.
  + User data retention: keep user analysis for 12 months initially.
  + Admin 2FA: simple.
  + No special certifications needed at MVP.

**B. API Keys & External Services**

* **Current API Keys:**
  + Claude API: Valid, usage limit for all user at 50 USD per month.
  + TwelveData: Key 71cdbb03b46645628e8416eeb4836c99 active.
  + Alpha Vantage: Free tier, confirm usable.
  + Yahoo Finance: Acceptable via yfinance.
  + Tadawul: TBD, will investigate additional APIs.
* **New Services:**
  + Anthropic Financial Services: Request access.
  + Email Service: Microsoft 365 email essentials.
  + SMS Service: Not needed at MVP.
  + Additional Data Providers: Not required at MVP.

**C. Database & Data Requirements**

* **Production DB:**
  + Expected Users: ~20 beta users.
  + Backup: Daily, 7-day retention.
  + Multi-region: Not required initially.
  + Migration: Brief downtime acceptable.
* **Data Sources:**
  + Historical: 10 years of stock data.
  + Real-time: 15-minute delay acceptable.
  + Markets: Saudi + US.
  + Retention: User analysis kept for 12 months.

**D. Application Configuration**

* **Authentication:**
  + Registration: Invite-only for beta.
  + Social Logins: Google, Apple, Amazon, & Microsoft.
  + Email Verification: Required.
  + Password Policy: Minimum 8 characters + complexity.
  + Session Duration: 36 hours.
* **Feature Priorities (High/Medium/Low):**
  + Saudi Market: High.
  + DCF Analysis: Simplified version first.
  + Management Analysis: Medium.
  + Chat Interface (React migration): Medium.
  + Mobile Support: Low for MVP.

**E. Business & Legal Requirements**

* **Fiduciary Advisor Mode:**
  + Legal Counsel: Internal legal available, not full investment license yet.
  + Disclaimers: Standard “not financial advice” disclaimer required.
  + Geographic Restrictions: Saudi & US only at MVP.
  + Investment Minimums: None.
  + Risk Disclosures: Generic risk disclaimer sufficient.
* **Business Model:**
  + Monetization: Free during beta, then TBD.
  + User Tiers: Single tier at MVP.
  + API Access: Not planned initially.
  + White Labeling: Future option, not MVP.

**F. Development & Deployment**

* **Environment Setup:**
  + Git: GitHub.
  + CI/CD: GitHub Actions.
  + Monitoring: AWS CloudWatch only.
  + Error Tracking: Sentry.
* **Team Access:**
  + AWS: I’ll hold admin; devs get scoped permissions.
  + Repository: Myself + 2 devs.
  + Production Access: Only me.
  + Monitoring Alerts: Send to my email.

**G. Testing & QA**

* **Testing:**
  + Beta Users: Yes, small group identified.
  + Load Testing: Expect ~100 concurrent users for stress test.
  + Security Testing: Basic penetration test pre-launch.
  + Compliance Testing: Not needed for MVP.

**Priorities Recap**

* **Week 1 (Critical):** AWS setup, domain decision, API key confirmation, basic security.
* **Week 2 (Important):** DB config, auth flow, feature priority, legal disclaimers.
* **Week 3+ (Planning):** Business model, team access, testing strategy, long-term infra.

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