

Output on streamlit localhost for new investors:

Select Investor Type

☒ New Investor

☐ Existing Investor

Mutual Fund Recommendation System

Personalized Fund Recommendations

Investment Budget (₹)

100000

Risk Tolerance

Medium

Fund Type (Asset Class)

Hybrid

Market Cap Preference

Multi Cap

Recommend Funds

Top Recommendations for You:

	Scheme ID	Scheme Name	Latest NAV	Units You Can Buy
0	119,158	navi conservative hybrid fund - direct plan quarterly idcw	16.2092	
1	120,790	uti conservative hybrid fund - direct plan - monthly payment option	56.3459	
2	102,533	uti conservative hybrid fund - regular plan - monthly payment option	53.7753	
3	120,426	icici prudential floating interest fund - direct plan - idcw others	161.064	
4	120,337	lic mf banking & psu fund-direct plan-daily idcw	12.4874	
5	135,763	axis children's fund - no lock in - direct plan - idcw	21.5711	
6	135,765	axis children's fund - lock in - direct plan - idcw	21.5461	

Output on streamlit localhost for existing investors:

(1) For recommendation: hold

MF Recommendation Phase

Inbox (2,908) - nidhipt150

Inbox (2,781) - nidhipatel

gpt workflow - Google Docs

budget added - Google Docs

Mutual Fund Recommendation


localhost:8501


Deploy

Select Investor Type

☐ New Investor

☒ Existing Investor

 **Mutual Fund Recommendation System**

 **Existing Portfolio Analysis**

Select your Scheme Name

baroda bnp paribas corporate bond fund - regular plan - annual idcw option

NAV at time of purchase

10.30

Units held

100.00

Purchase date

2024/05/16

Analyze Portfolio

35°C Partly sunny

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MF Recommendation Phase

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Mutual Fund Recommendation

localhost:8501

Deploy

Select Investor Type

☐ New Investor

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Units held

100.00

Purchase date

2024/05/16

Analyze Portfolio

☒ Recommendation: Hold

Reason: Current fund is optimal based on profile.

Summary:

	Value
Current Fund ID	150233
Latest NAV	10.83
Top Similar Fund ID	119792
Scheme Name (Top)	sbi credit risk fund - direct plan - daily income distribution cum capital withdrawal option (idcw)
Recommendation	Hold
Reason	Current fund is optimal based on profile.

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(2) For switch recommendation

MF Recommendation Phase

Inbox (2,907) - nidhipt150

Inbox (2,781) - nidhipatel

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Mutual Fund Recommendation System


localhost:8501

Deploy


Select Investor Type

☐ New Investor

☒ Existing Investor



Mutual Fund Recommendation System



Existing Portfolio Analysis

Select your Scheme Name

dsp india t.I.g.e.r. fund - regular plan - growth

NAV at time of purchase

324.70

Units held

50.00

Purchase date

2024/06/13

Analyze Portfolio

☒ Recommendation: Switch

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MF Recommendation Phase

Inbox (2,907) - nidhipt150

Inbox (2,781) - nidhipatel

gpt workflow - Google Docs

budget added - Google Docs

Mutual Fund Recommendation System

localhost:8501

Deploy

Select Investor Type

☐ New Investor

☒ Existing Investor

Purchase date

2024/06/13

Analyze Portfolio

☒ Recommendation: Switch

Reason: Better fund found in same class and risk level.

Summary:

Value

Current Fund ID102434

Latest NAV322.11

Top Similar Fund ID131357

Scheme Name (Top)bandhan balanced advantage fund regular plan growth

RecommendationSwitch

ReasonBetter fund found in same class and risk level.

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