* Good Morning Everyone!, During this demo, we are going explore key features like data lineage, Auto Completion, multi-lingual support, speech input/output, Feedback loop ,multi-modal capabilities etc. We’ll also see how Sales Buddy implements critical guardrails, such as avoiding forward-looking statements, no comments on investment advice or stocks, Avoid answering outside of training scope and maintaining data security. We are using ACL to ensure Salesbuddy accessible to  authorized users only. Also we are using India-based  resources, ensuring compliance with data localization requirements and keeping private data within India only.

**Demo Walkthrough:**

* Lets move on to the demo , SalesBuddy has responsive UI which adapt to both mobile and web views, ensuring a seamless experience across devices. Rms can login sales buddy using their ID and Password. Upon login, we’ll land on the SalesBuddy Page. Here, we can See various features  like
* **Persona Selector:** "we can see the persona button, this dropdown allows us to select persona—Beginner, Intermediate, or Expert based on  experience level and it will provide response according to persona e.g., simplifying terms for beginners or offering detailed explanations for experts.
* **Fund Name Filter:** "Next to the Persona Selector, we’ll find the Fund Name Filter, enabling us to narrow down responses to specific funds or we can select all as per requirement.

**Lets ask a question  "Can you please tell me a summary of HDFC Flexi Cap Fund?"**

**So we can see that while typing questions it** will analyze the user's input in real-time to predict and suggest the next words or phrases. This is particularly useful for speeding up interaction and improving efficiency.

**Once submit the question**While the assistant gathers this information, it's ensuring that the data lineage is intact, meaning it’s tracing back to the original sources used to compile this summary, RMs can able to see reference document and download from chat as well.  
  
Along with response we can see that its providing Follow up questions, these questions appear based on the context of the conversation, guiding users towards the next steps or related questions.   
  
Also we can see thumbs up/down button below the response , RMs can provide feedback using Thumbs up/Thumbs Down button, which are used to enhance the Sales Buddy’s performance. Over time, we should notice an improvement in the quality and relevance of the Sales Buddy’s responses.

Sales buddy also support Speech input and out put, This feature allows users to interact with the Sales Buddy using voice commands and receive voice responses, making the interaction more natural. RMs can use a voice command to ask a question like

**Second Question: "Compare the average annual total returns of HDFC Flexi Cap Fund and HDFC Small Cap Fund."**  
  
it will provide response n text as well as speech format , we can click here on audio button to hear speech response.   
Also we can see that its showing recency of data from response is taken

Here, let’s switch to Quick Mode. SalesBuddy will deliver concise results in just a 2-5 seconds. For a more in-depth analysis, we could switch back to Normal Mode."

**Fourth Question: "Compare HDFC Small Cap Fund with its benchmark performance over 1yr, 3yr, 5yr, and 10yr."**

Sales buddy supports multiple regional and global languages, allowing users to interact in the language they are most comfortable with. Lets ask a question in hindi and see

**Question (Hindi): "इस फंडकी निवेश रणनीति क्या है?"**

It will automatically detect language and seamlessly switches languages, allowing users to interact in their preferred language.  
  
let me ask a question in French as well, We can see that its switched language and provide response in French only.  
**Question (French): "Quel est le nom du gérant du HDFC Flexi Cap Fund?"**

We have enabled Multimodal capabilities as well in sales buddy , for that we have add 1-1 sample audio , video and image file to show capability,   
What are the key factors affecting bond yields as discussed in the January 2022 market update?  
  
When RMs will ask questions based on the sample image, audio, and video, It will utilize cognitive services to process the image/video/audio and provide the extracted information. Here we can see that its provided answer from video file and in refrense its showing seconds as well from this answer is taken.  
  
  
We are also Following guardrails like **Avoiding Out-of-Scope Queries , so when we will ask any question outside the training data it will not provide response .**

"Who is the Prime Minister of India?"

SalesBuddy politely declines to answer, ensuring the conversation stays focused on financial data."

Also, it will not provide any **Forward-Looking response or investment advice.**

**Question:** "Can you tell me the future return of HDFC Flexi Cap Fund in 2028?"