

# FinWizz

*Your Smart Personal Finance Health Companion*

CodeBrew

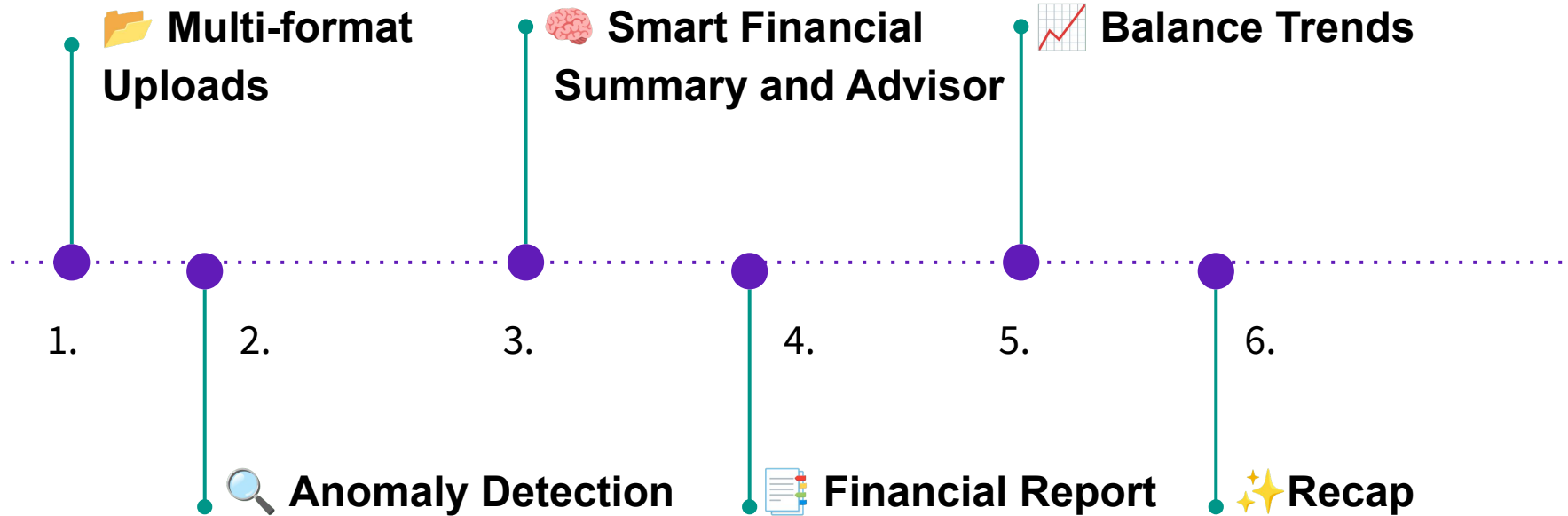
## **Problem Statement**

- Modern users struggle to understand their spending habits.
- Lack of awareness → overspending, poor savings, financial anxiety.
- Bank statements are overwhelming and non-intuitive.

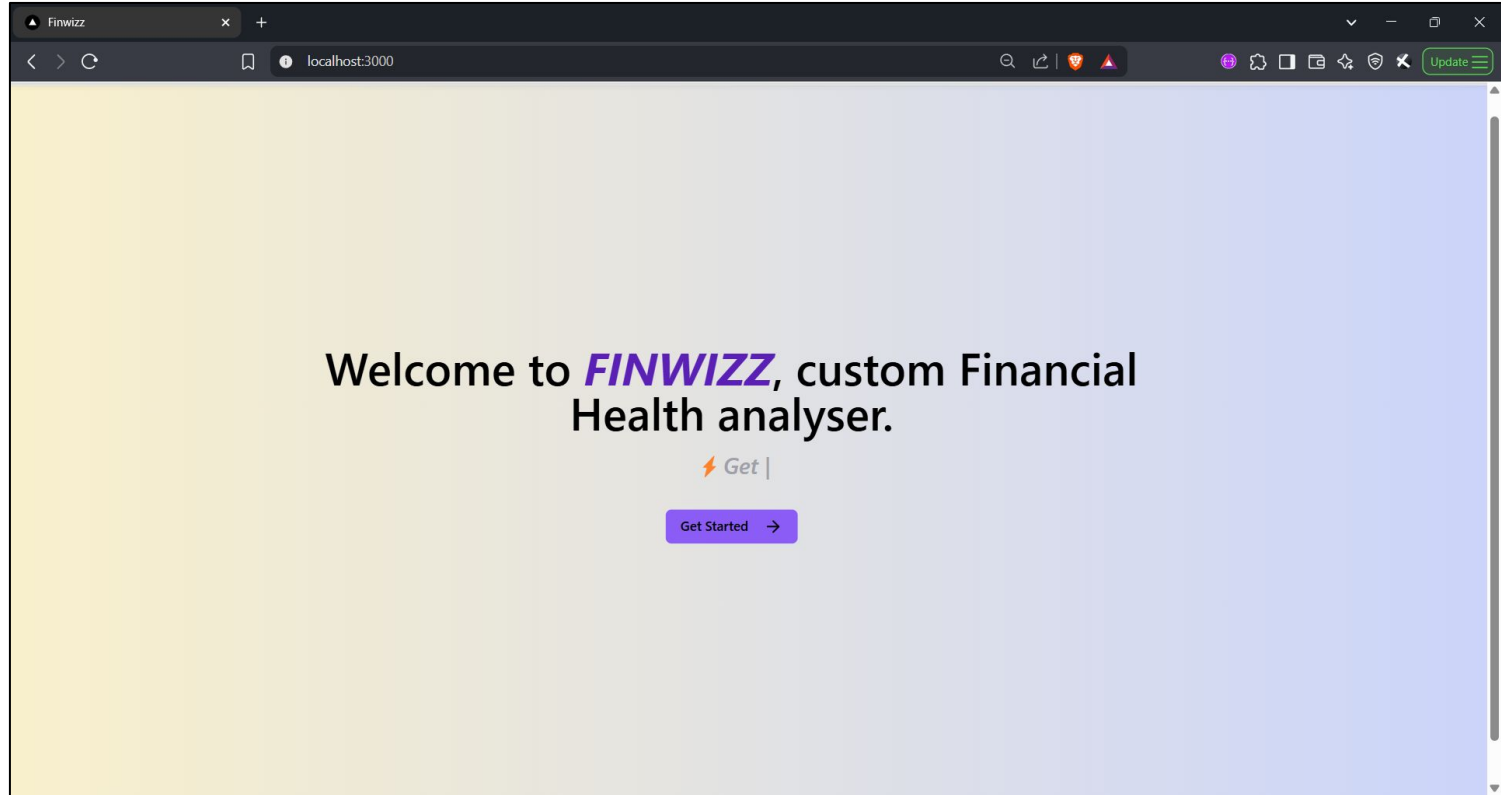
## **Solution Overview**

- Upload your bank statement.
- Instantly get categorized insights.
- Track savings, detect recurring expenses, set goals.
- Get advice from an AI finance coach.
- Stay motivated with game-like challenges and rewards.

# Key Features

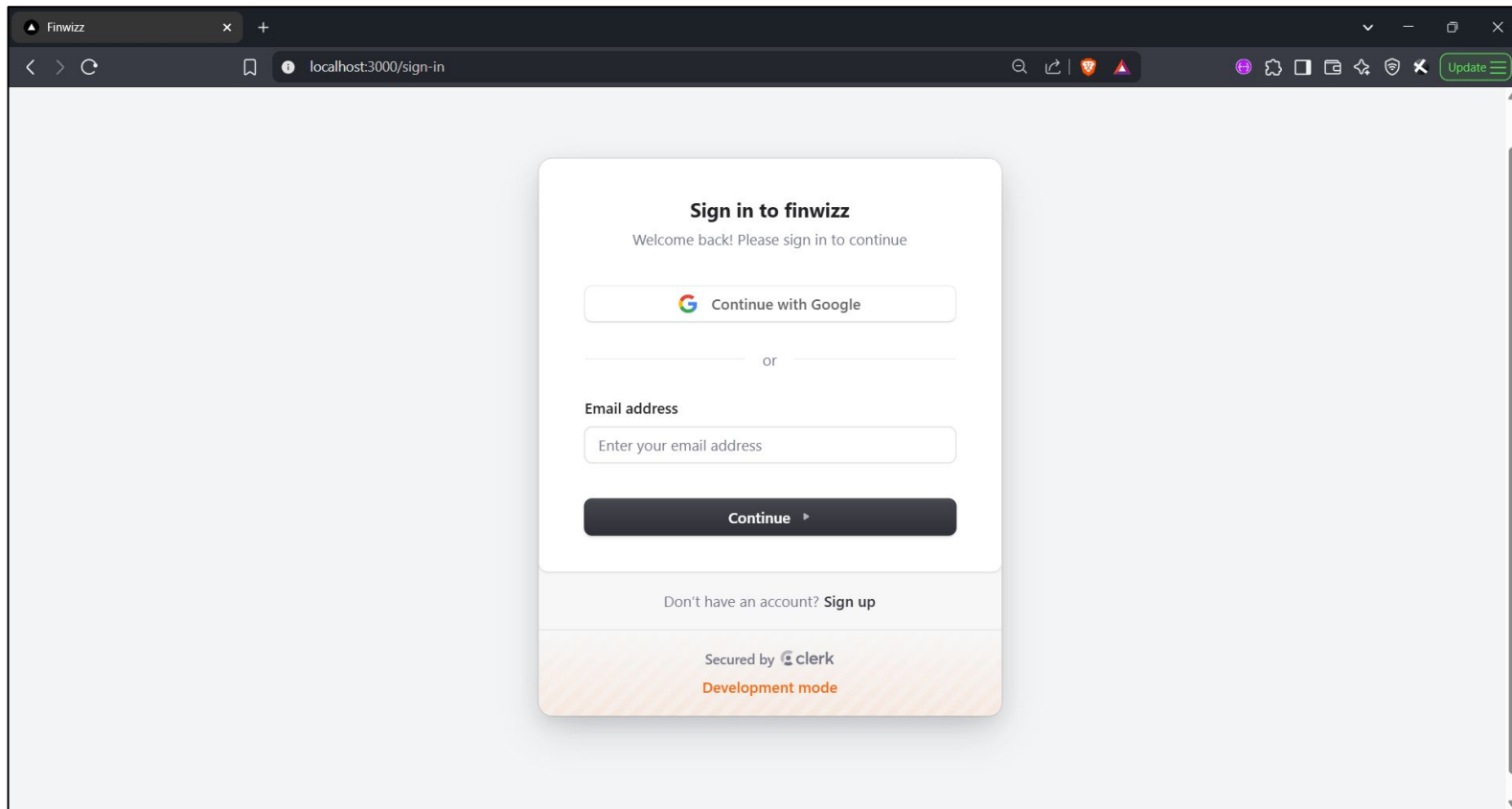


# UI Screenshots



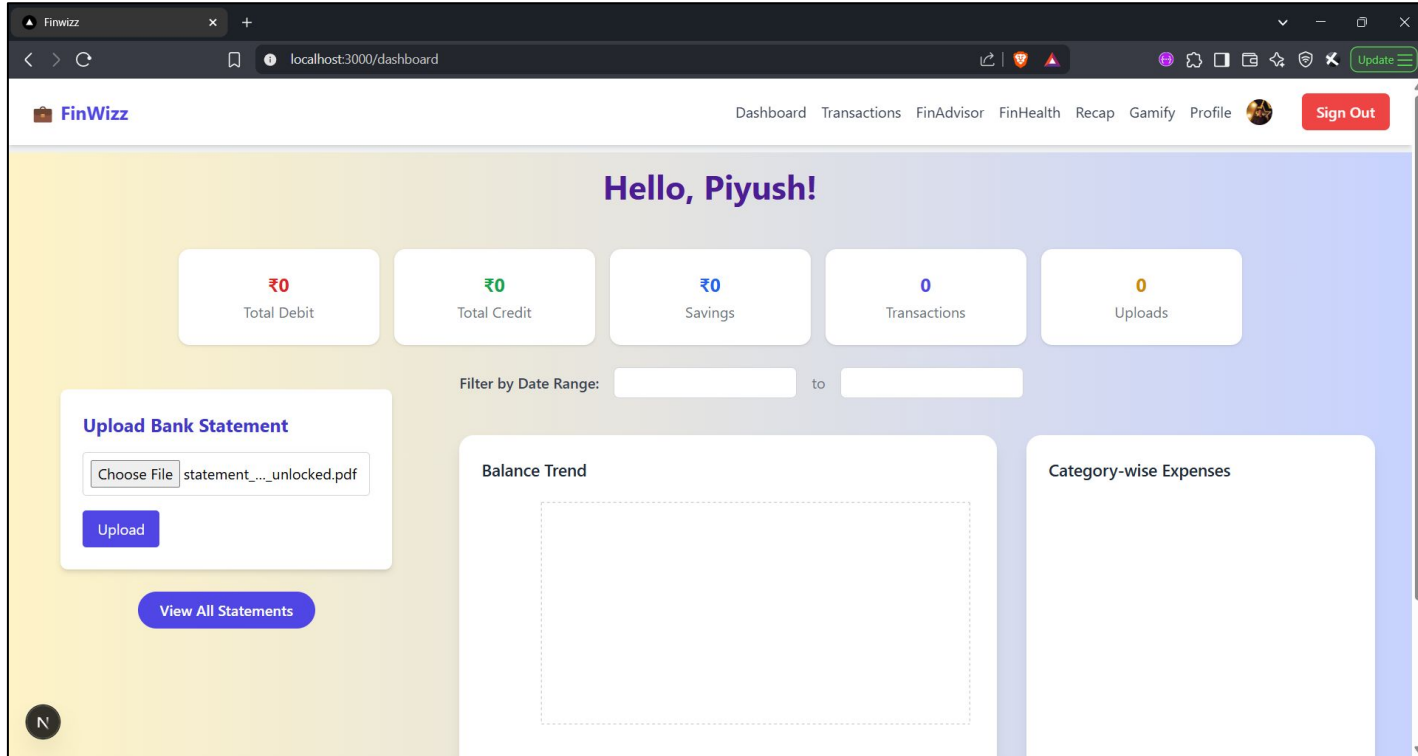
**Get Started with FinWizz - Financial Health Analyzer**

# UI Screenshots



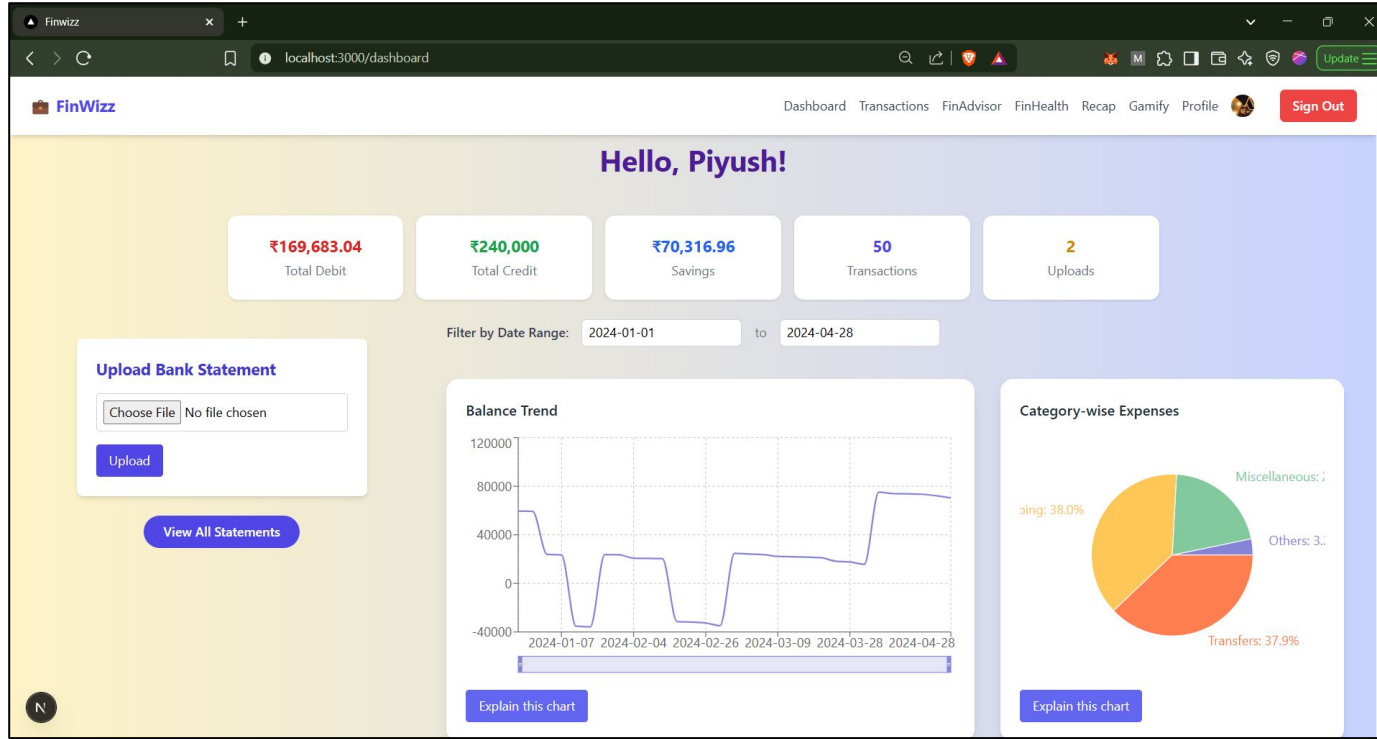
**Sign Up/Login Page made with Clerk**

# UI Screenshots



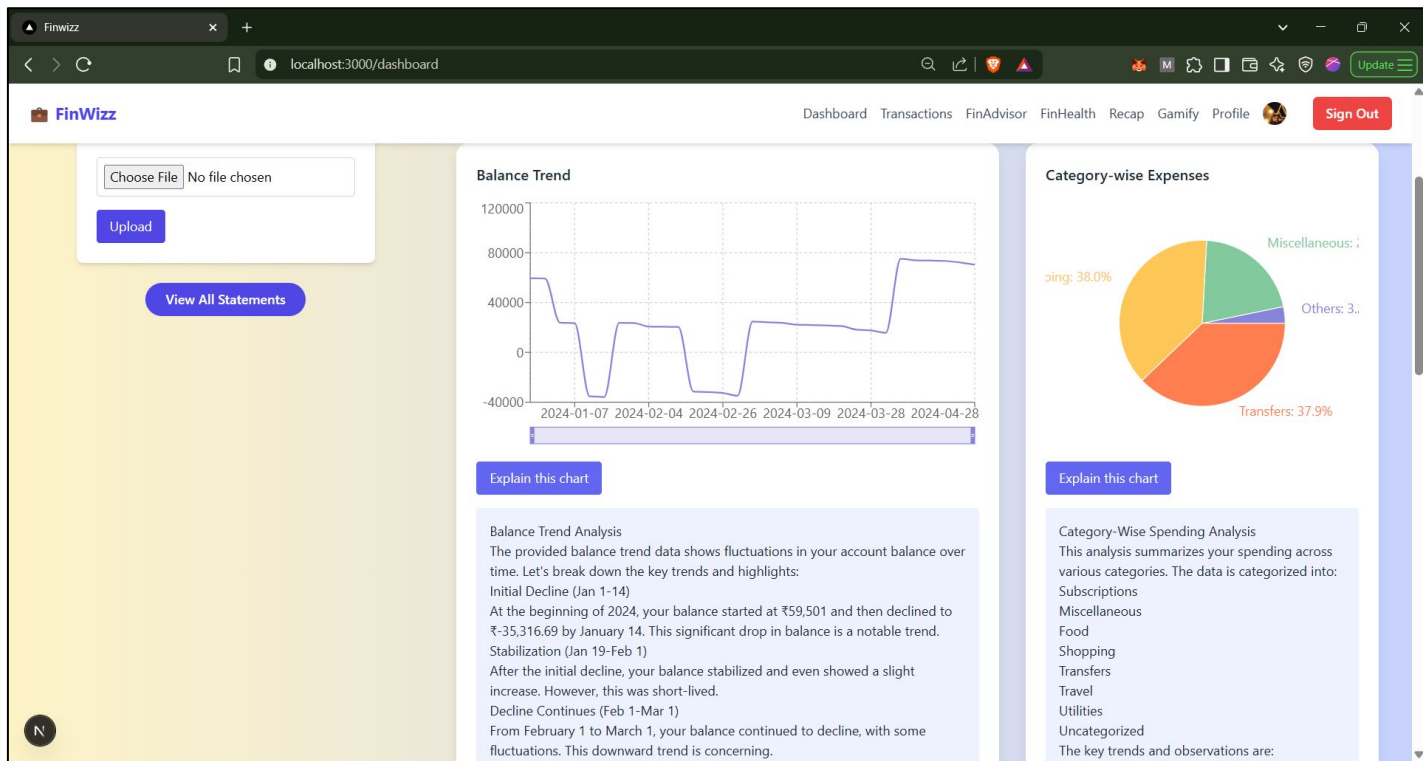
**Uploading PDF for parsing**

# UI Screenshots



After transactions parsing - Balance over time + Categorical Analysis

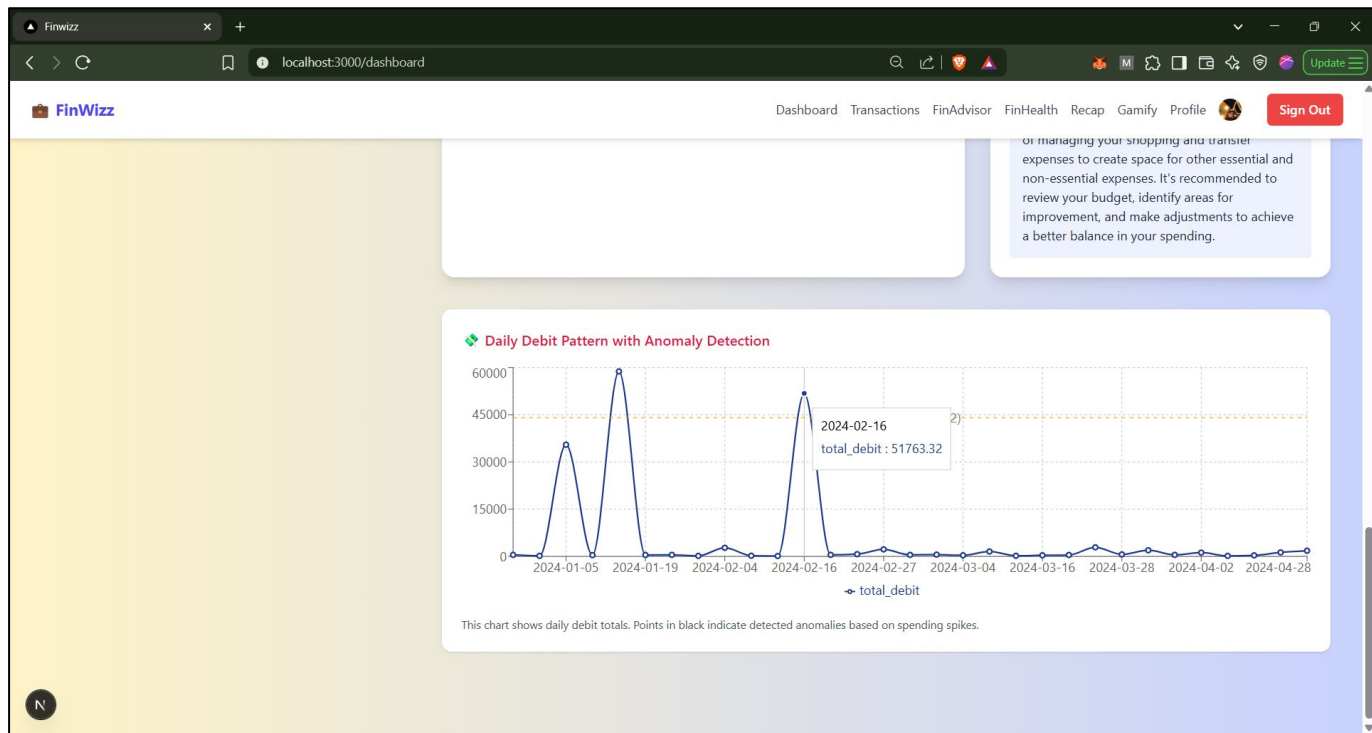
# UI Screenshots



Explaining charts using AI



# UI Screenshots



**Anomaly detection in user transactions**

# UI Screenshots

The screenshot displays the FinWizz web application interface. The browser address bar shows the URL `localhost:3000/TransactionsPage`. The application header includes the FinWizz logo, navigation links (Dashboard, Transactions, FinAdvisor, FinHealth, Recap, Gamify, Profile), a user profile icon, and a 'Sign Out' button. A 'Update' button is visible in the top right corner of the browser window.

The main content area is titled 'Your Transactions' and features a table of transactions. On the left side of this area, there is a 'Filters' section with the following controls:

- A search input field labeled 'Search description...'.
- 'Start Date' and 'End Date' input fields.
- A 'Type' dropdown menu currently set to 'All'.
- A 'Category' dropdown menu currently set to 'All'.

The transactions table contains 10 rows of data. The columns are: #, Date, Description, Amount, Category, and Balance. The 'Amount' column uses color coding: green for positive values and red for negative values. The 'Category' column includes a dropdown arrow for each entry.

#	Date	Description	Amount	Category	Balance
1	1/1/2024	BY TRANSFER-UPI/CR/432697545055/SHASHANK/HDFC/barclays@s...	60000.00	Salary	65000.00
2	1/1/2024	TO TRANSFER-UPI/DR/403585116810/SHASHANK/HDFC/netflix@ok...	-499.00	Subscriptions	124501.00
3	1/3/2024	TO TRANSFER-UPI/DR/425776749224/SHASHANK/HDFC/primevideo...	-179.00	Subscriptions	124322.00
4	1/5/2024	TO TRANSFER-UPI/DR/493930586482/SHASHANK/HDFC/hotel@oka...	-35476.08	Miscellaneous	-22344.96
5	1/7/2024	TO TRANSFER-UPI/DR/497990155565/SHASHANK/HDFC/swiggy@ok...	-413.05	Food	-27302.71
6	1/14/2024	TO TRANSFER-UPI/DR/463098398236/SHASHANK/HDFC/croma@oki...	-58749.56	Shopping	13131.12
7	1/19/2024	TO TRANSFER-UPI/DR/432055208897/SHASHANK/HDFC/weirdstore...	-470.32	Shopping	-24559.53
8	2/1/2024	BY TRANSFER-UPI/CR/409390147815/SHASHANK/HDFC/barclays@s...	60000.00	Salary	125000.00
9	2/1/2024	TO TRANSFER-UPI/DR/413324977893/SHASHANK/HDFC/netflix@ok...	-499.00	Subscriptions	123823.00
10	2/3/2024	TO TRANSFER-UPI/DR/440829132320/SHASHANK/HDFC/primevideo...	-179.00	Subscriptions	123644.00

At the bottom of the table, there are 'Previous' and 'Next' buttons for pagination. The page number 'Page 1 of 5' is displayed in the center of the bottom bar.

User transactions listed with filters

# UI Screenshots

The screenshot displays the 'TransactionsPage' in a web browser. The page features a sidebar with filters and a main table of transactions. A dropdown menu is open for the 'Transfers' category of the 13th transaction, showing options like 'Change Category', 'Salary', 'Food', 'Travel', 'Shopping', 'Subscriptions', 'Utilities', 'Transfers' (highlighted), 'Wallets', 'Rent', 'Health', 'Education', 'Entertainment', and 'Miscellaneous'.

**Filters**

Search description...

Start Date

End Date

Type

All

Category

All

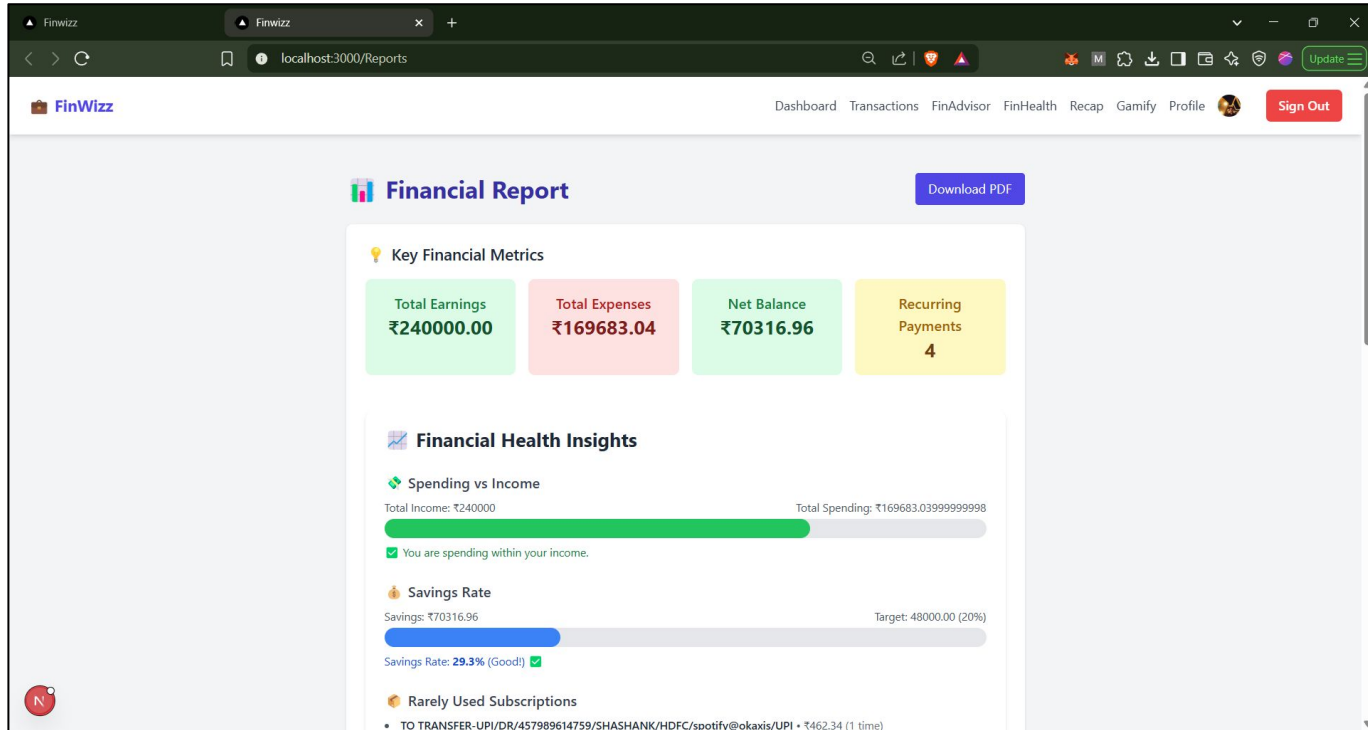
**Your Transactions**

#	Date	Description	Amount	Category	Balance
11	2/4/2024	TO TRANSFER-UPI/DR/451309790021/SHASHANK/HDFC/gpay@okici...	-1331.60	Transfers	-26889.66
12	2/4/2024	TO TRANSFER-UPI/DR/495118962275/SHASHANK/HDFC/unknownbiz...	-863.17	Transfers	-25422.70
13	2/4/2024	TO TRANSFER-UPI/DR/484717642152/SHASHANK/HDFC/flipkart@ok...	-556.75	Change Category	-23123.36
14	2/10/2024	TO TRANSFER-UPI/DR/424799056105/SHASHANK/HDFC/zomato@ok...	-31.37	Salary	-22566.61
15	2/10/2024	TO TRANSFER-UPI/DR/405370918715/SHASHANK/HDFC/zomato@ok...	-58.01	Food	-22512.17
16	2/10/2024	TO TRANSFER-UPI/DR/452107045658/SHASHANK/HDFC/zomato@ok...	-35.40	Travel	-22454.16
17	2/10/2024	TO TRANSFER-UPI/DR/465501320959/SHASHANK/HDFC/zomato@ok...	-37.56	Shopping	-22418.76
18	2/10/2024	TO TRANSFER-UPI/DR/407859963074/SHASHANK/HDFC/zomato@ok...	-36.24	Subscriptions	-22381.20
19	2/10/2024	TO TRANSFER-UPI/DR/428067445918/SHASHANK/HDFC/zomato@ok...	-23.07	Utilities	-22535.24
20	2/14/2024	TO TRANSFER-UPI/DR/407246039479/SHASHANK/HDFC/netflix@okh...	-135.36	Transfers	-25558.06

Previous Page 2 of 5 Next

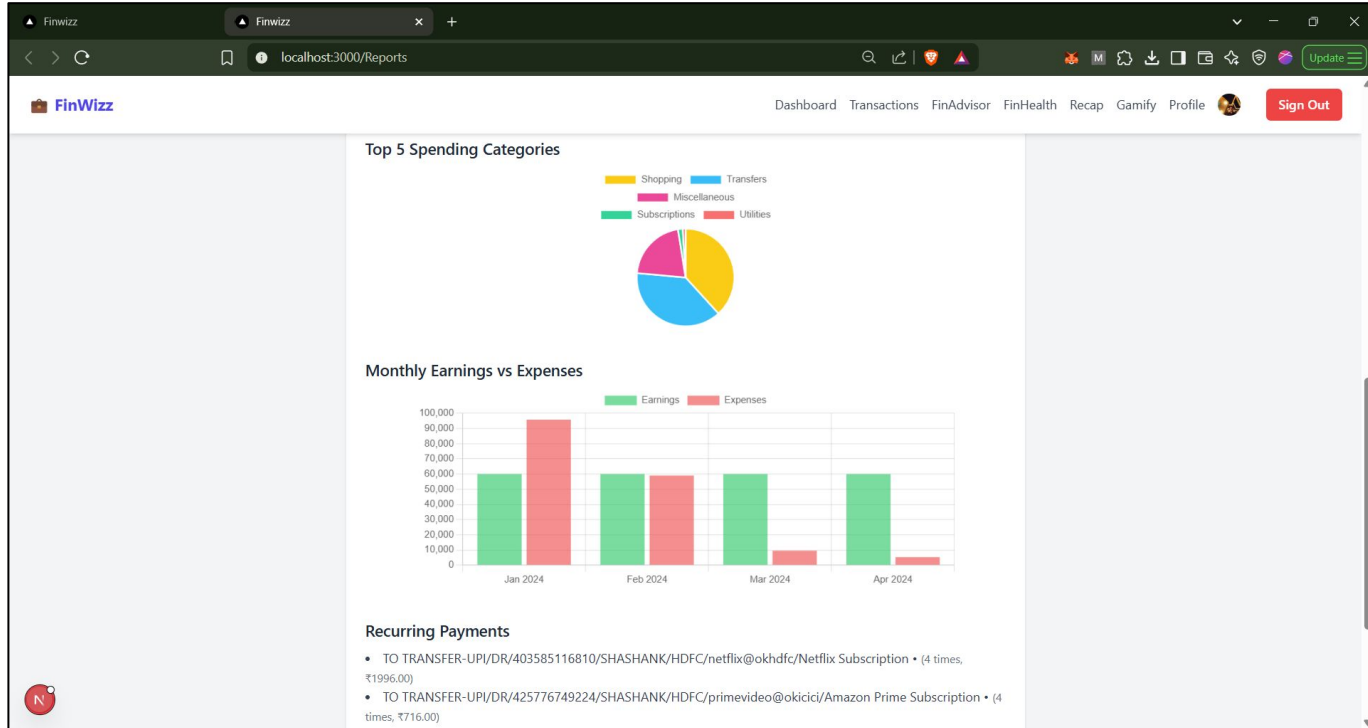
User has ability to change category pre-assigned by LLM

# UI Screenshots



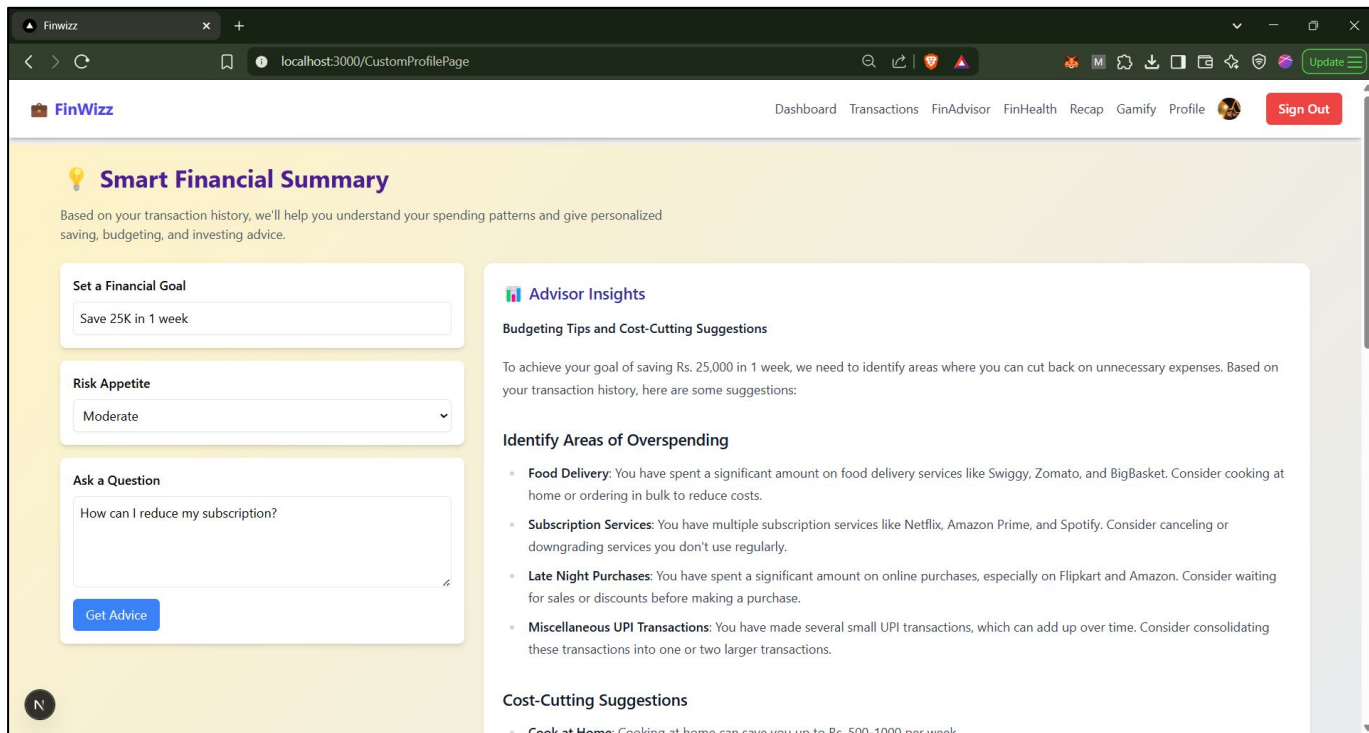
Report generated

# UI Screenshots



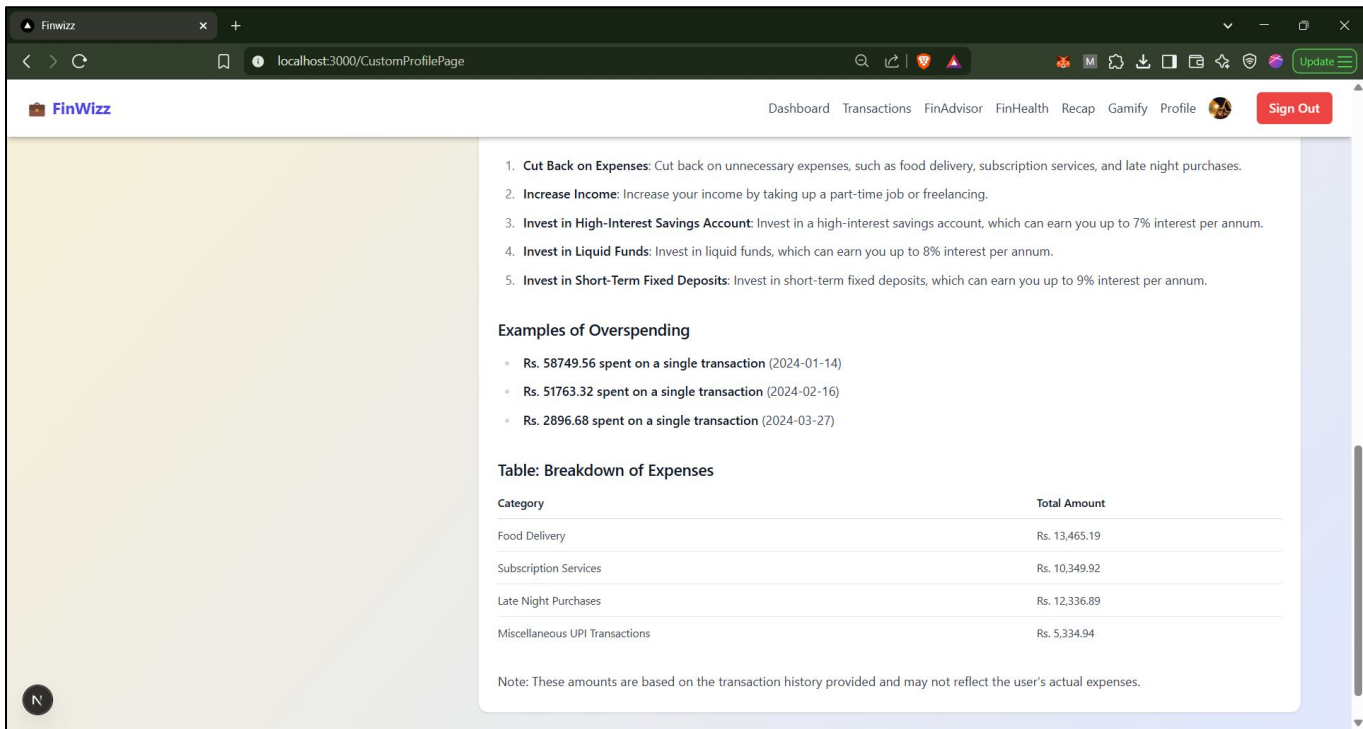
Report generated

# UI Screenshots



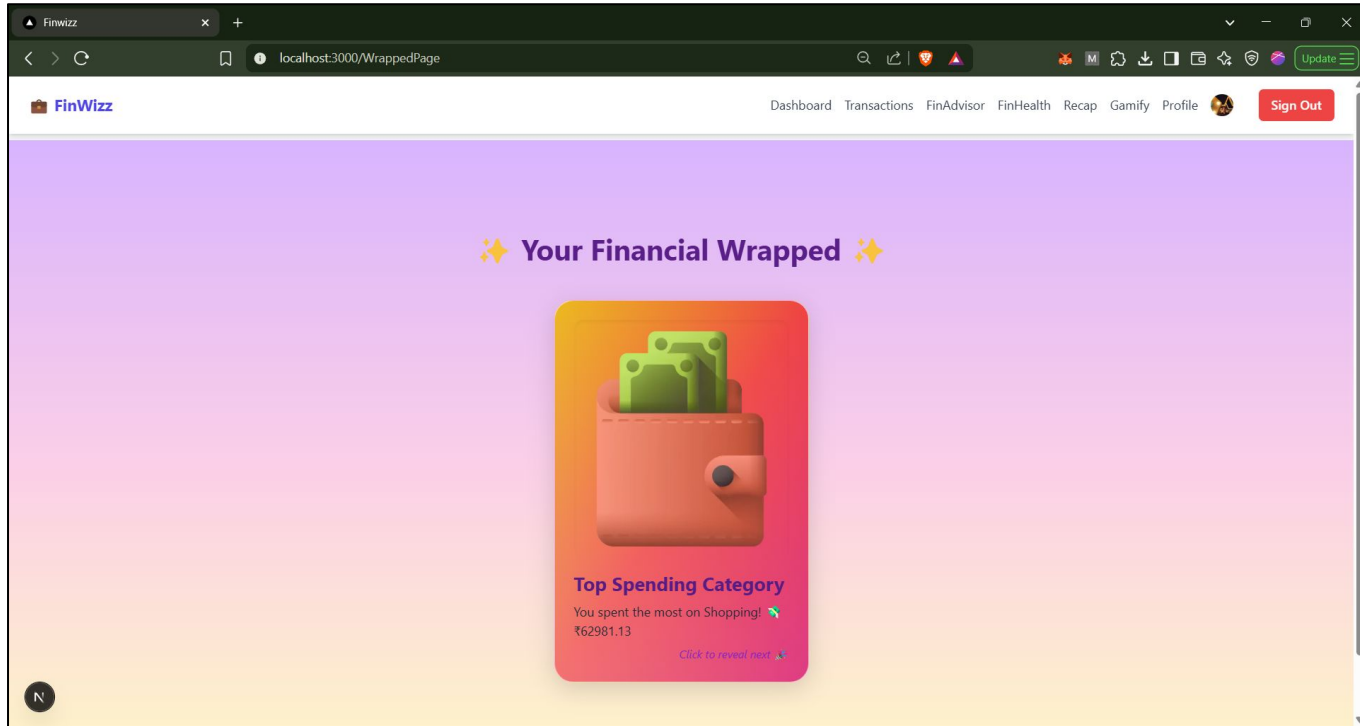
FinAdvisor in action

# UI Screenshots



## FinAdvisor in action

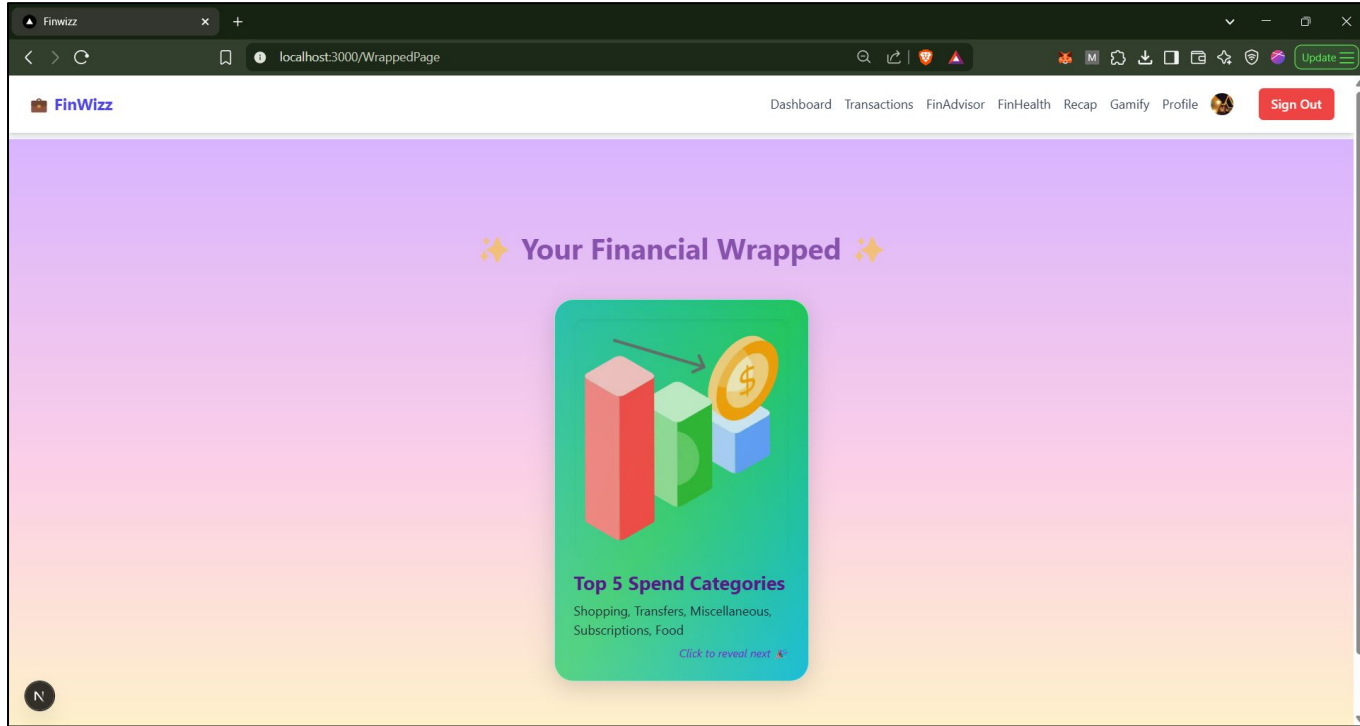
# UI Screenshots



## Financial Wrapped - Gamification



# UI Screenshots



## Financial Wrapped - Gamification

# Tech Stack

1. **Frontend:**

- Next.js for a fast, modern web experience with TailwindCSS for responsive and consistent styling.

2. **Authentication:**

- Clerk for secure, user-friendly authentication and session management.

3. **AI Integration:**

- Together API for generating contextual, natural language financial insights using LLMs.

4. **Backend & Storage:**

- MongoDB for flexible and scalable data storage of parsed documents and user information.

5. **Data Visualization:**

- Recharts to present financial data in intuitive, interactive charts.

6. **PDF Export:**

- React-pdf and html2pdf for generating downloadable, shareable financial reports.

# Conclusion

This project empowers users with intelligent, real-time financial insights by analyzing their bank statements and UPI transactions. From detecting hidden subscriptions and spending anomalies to generating personalized budgeting and goal-oriented advice using AI, the system transforms raw transaction data into actionable guidance. With a clean dashboard, smart visualizations, and seamless LLM integration, it bridges the gap between everyday spending and smart financial decision-making.