

# OptiVise Robo-Advisor



# Problem Statement

Individuals struggle to build optimized portfolios aligned with their risk tolerance and goals. Traditional advisors are expensive and not scalable. Our goal: Build a robo-advisory tool to automate intelligent portfolio recommendations



# Features

AI Financial Advisor to answer any of your questions related to Budgeting, Investment Strategy, Retirement Savings, Risk Assessment, and Debt Repayment.

Utilize Generative AI to generate a portfolio from 5 asset classes

- Stocks
- Bonds
- Real Estate
- Commodities
- Crypto

# Investor Profile



Risk Tolerance Level

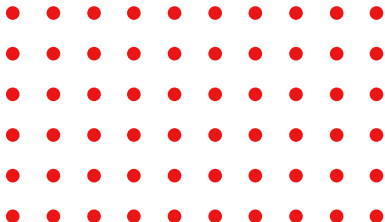
Investment Horizon

Financial Goals

Liquidity Preference

Asset Types

Initial Balance



# Optimization Model

## Utilizes

- Historical returns data
- Mean-variance

## Applies

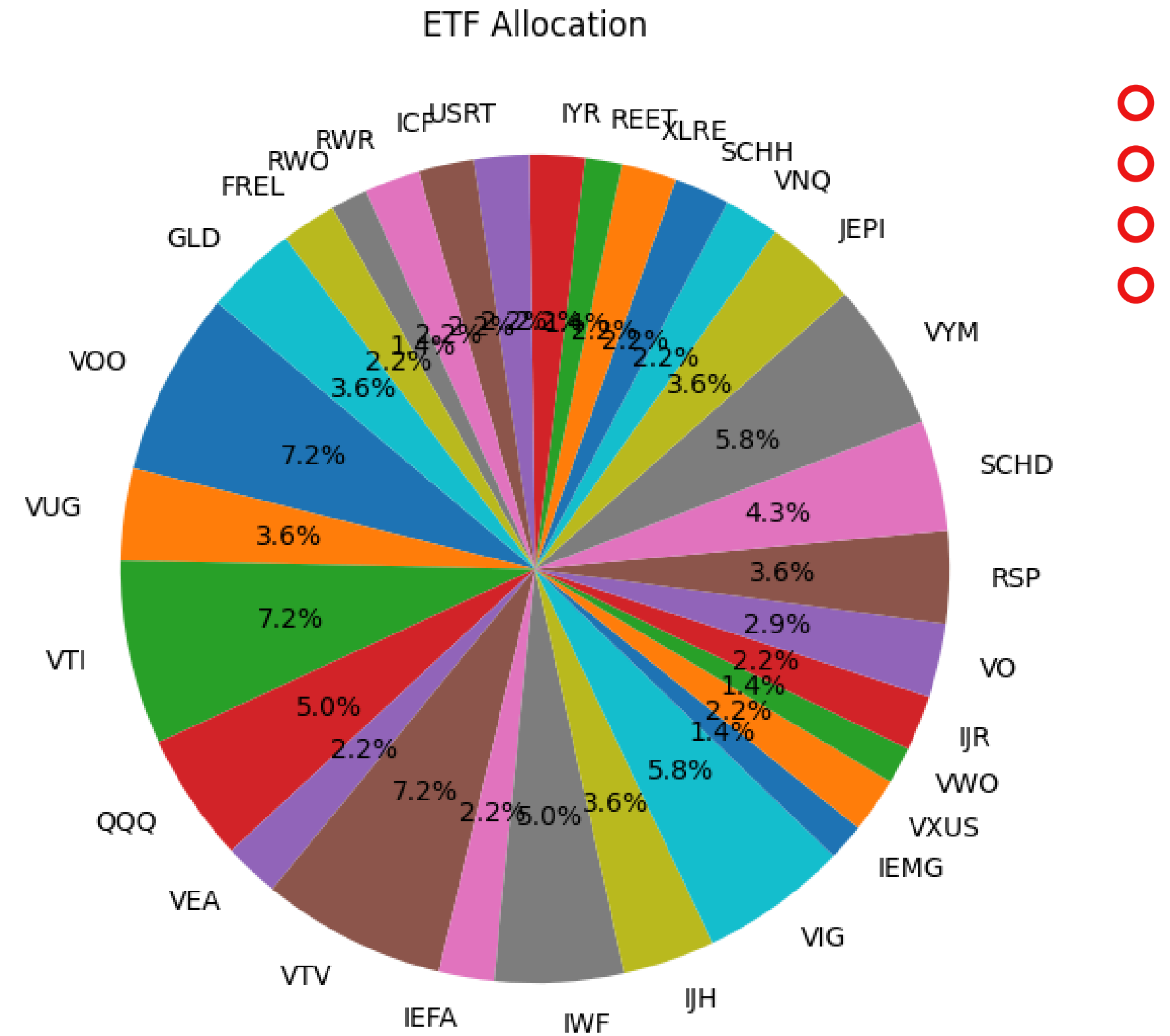
- Portfolio risk tolerance
- Types of Assets

x x x x

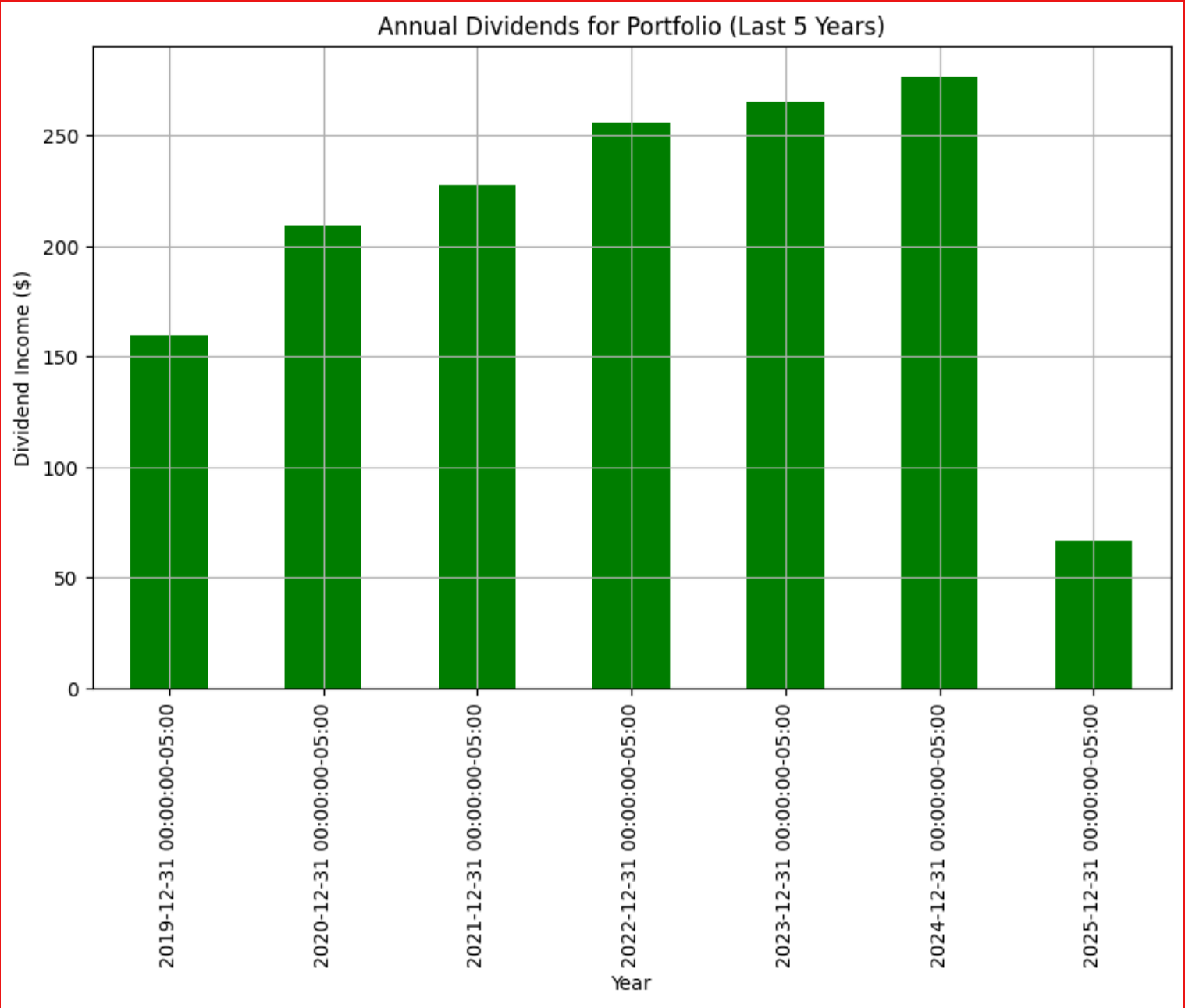
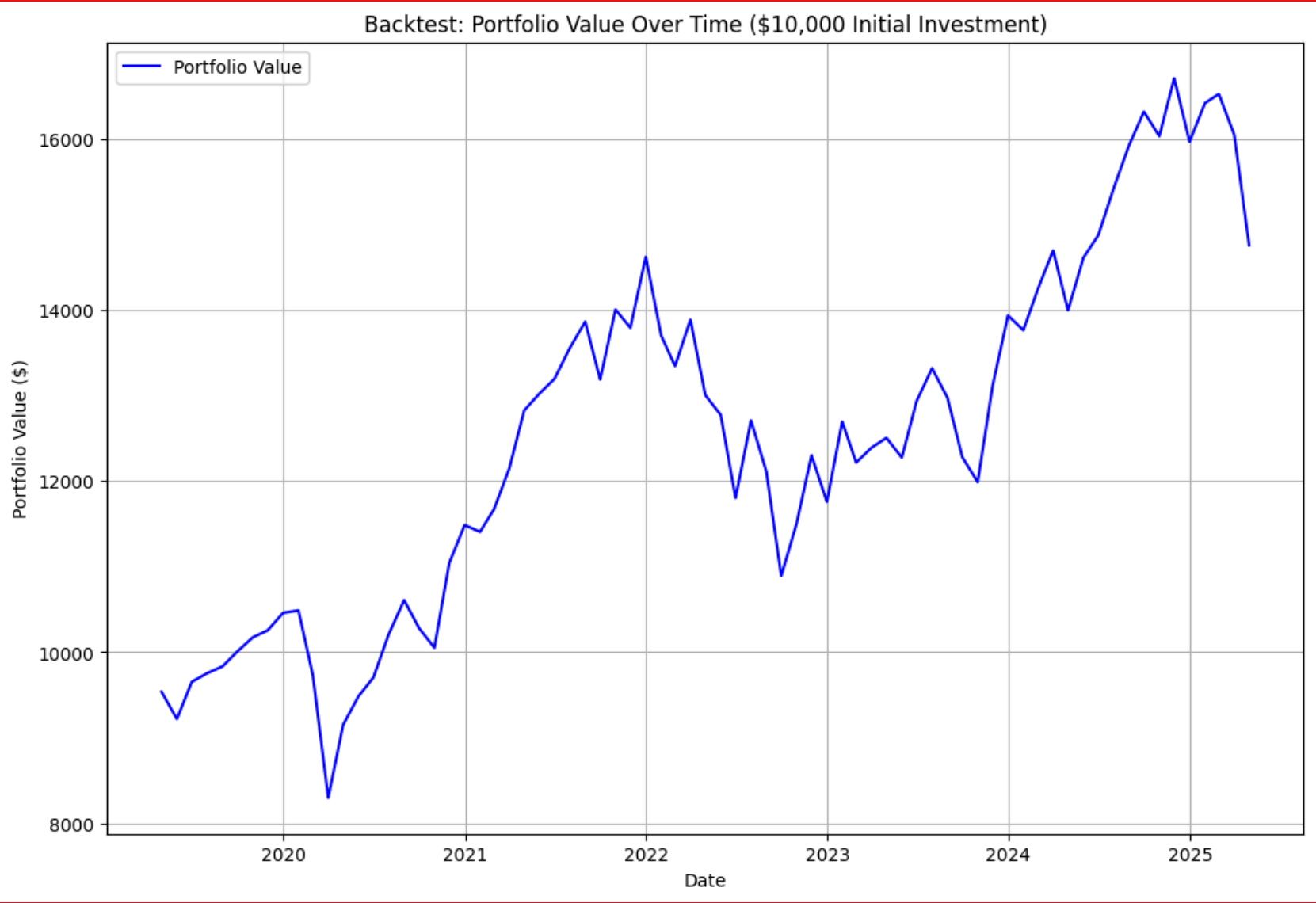
# Graphs

Example Portfolio by our Robo Advisor for a user

Moderate Risk Tolerance  
5 year time horizon  
Include Real Estate  
Do not include Crypto



# Backtesting



x x x x

# LIVE DEMO

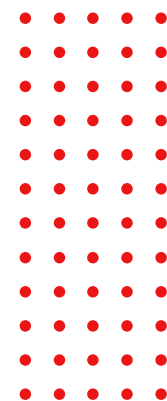




# Next Steps

Although five hours was a tight window to implement everything we envisioned, we hope to take the next steps and integrate the backend into a more comprehensive system.

Looking ahead, we're excited to build this into a cohesive product featuring a personalized insights feed, risk monitoring alerts, and community or peer comparisons.



# Thank You

