Q3 AI Trading Platform Roadmap

🎯 Strategic Focus

Balance infrastructure enhancements with strategic rollout of intelligent collaborative features (ChatBot 2.0 and KM Nuggets).

Priority Infrastructure (Weeks 1–2)

1. Semantic Sync Engine v2

- **Objective:** Refactor current sync engine to support contextual, semantic segmentation of files
- **Outcome:** Foundation for contextual KM Nugget tagging and dynamic document memory

2. Persistent Context Store

- **Objective:** Enable module-wide memory retention with time-scoped, user-specific context
- **Outcome:** Cross-module contextual intelligence (chat, backlog, HLDD, strategy)

3. User Identity & Role Layer

- **Objective:** Lightweight identity model to support user-specific sessions and permissions
- **Outcome:** Required for collaborative commenting, chat filtering, and audit trails

---

🎙️ Integration Layer (Week 2–3)

4. Task ↔ Design ↔ Code Linkage

- **Objective:** Connect backlog items to design elements and functional modules
- **Outcome:** Ask-to-Action enabled (chatbot proposes real work items or retrieves relevant HLDD logic)

5. Module Runtime Services

- **Objective:** Simulate and execute modules in sandboxed environments for testing
- **Outcome:** Enables AI-guided live interaction during strategy design, simulation, or bug triage

---

AI Collaboration Layer (Week 3–4)

6. Chat Bot 2.0 (Collaborative + Context-Aware)

- **Objective:** Extend current chatbot into multi-threaded, persistent memory agent

    • **Outcome:** Rich, thread-aware conversations with contextual backtrace and project memory

7. KM Nuggets Engine

    • **Objective:** Automatically generate knowledge nuggets from synced content, tasks, and chat threads
    • **Outcome:** Semantic knowledge base with audit trails and contextual triggers

---

UX & Explorer Integration (Week 4–5)

8. Collaborative UI for Nuggets & Chat

    • **Objective:** In-app nugget explorer and collaborative chat interface
    • **Outcome:** Users can view, annotate, and trigger action from nuggets/chat memories

9. Memory Map Export

    • **Objective:** Convert KM nuggets and chat threads into task templates, designs, or workflows
    • **Outcome:** Bridge between ideation and execution

Ready for Rollout by End of Q3

By end of September 2025: - Intelligent ChatBot 2.0 with memory tracing and execution assist - KM Nugget System with real-time sync, tagging, and explorer UI - Platform ready for collaborative use, technical demos, and internal testing

---

Let me know if you'd like this formatted as a visual Gantt timeline or integrated into the master HLDD.