

# FinSight – Product Specification

**Tagline:** *Smarter Portfolio Analytics. Faster Decisions.*

**Created by:** Lingala Naga Jyothi Sharanya

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## 1 Product Overview

**FinSight** is a lightweight, real-time portfolio analytics dashboard designed for hedge funds and institutional investors. It aims to replace bloated tools like Bloomberg Terminal by offering deep financial insights through a fast, intuitive interface.

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## 2 Problem Statement

Institutional investors need to monitor and manage large portfolios with speed and precision. Current tools are expensive, overly complex, and not tailored for custom portfolio reporting. FinSight solves this by offering a plug-and-play dashboard that delivers instant risk and attribution insights.

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## 3 Solution: FinSight

FinSight is a web-based dashboard built with Streamlit. It enables users to:

- Track returns and volatility
  - Analyze sector exposure
  - Upload custom datasets
  - Interact with clear, responsive visuals
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## 4 Product Thinking Highlights

- User Focus: Designed for analysts and advisors, with fast, intuitive UI

- MVP Execution: Core features delivered first; lean iterations
  - Scalable Design: Modular code for future integrations such as APIs and authentication
  - Insight Delivery: Clear data storytelling through thoughtful visualization
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## **5 Results**

| <b>Metric</b>           | <b>Target Value</b>            |
|-------------------------|--------------------------------|
| Dashboard Load Time     | < 2 seconds                    |
| Portfolio Accuracy      | > 99% match with Yahoo Finance |
| Daily Active Risk Users | 20+ from pilot funds           |
| Crash-Free Session Rate | 98%                            |

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## **6 Roadmap**

### **Phase 1:**

- CSV Upload
- Basic Risk Metrics

### **Phase 2:**

- Sector Visuals
- Attribution Reporting

### **Phase 3:**

- Export Features
  - Mobile View
  - Live Data Refresh
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## **7 Competitive Advantage**

- Faster and cheaper than Bloomberg
- Custom-built for boutique hedge funds
- Easier onboarding and use
- Real PM-style data strategy + KPIs