INVESTMATE

AGENDA

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TEAM MEMBERS

- 1.Venkatesh Nidumukkala - Project Manager
- 2.Ankit mhatre - Machine learning engineer
- 3.Uma Maheshwari Bichinepally - Developer
- 4.Tejaswi Koppula - Developer
- 5.Charan Raju M - Developer
- 6.kilaru Mani Chandana - Developer

PROBLEM STATEMENT

•In a modern world of finance, numerous young people aged from 18 to 25 years old are confused looking at the situation when, on one hand, they aspire to get involved in this global trend but, on the other hand, they experience numerous difficulties trying to search for a source of practical experience and knowledge. Even as you understand the principles from the course rooms academically, you struggle to apply them in the real life scenarios. This results in proficiency gap between your educational knowledge and investment strategies. This gap is a result of overwhelming complications in the structure as well as the FEAR of monetary loss, which is a key factor education platform which should be easy to understand and also a learner-based approach should be discovered.

PROJECT DESCRIPTION

•An AI-Powered Investment Portfolio Assistant is a web-based tutorial tool aimed at giving hands-on exposure on investing for college students and young adults to fill the knowledge gap between classroom and real investing. Listening to historical market data, the platform is a place for users to test different investment strategies, looking for market dynamics, but managing virtual portfolios as well. The platform has designed to be an interactive learning sheet; through personalized investment recommendations based on machine learning algorithms and a user-friendly interface, the platform rans all of that while educating the users to be well informed when it comes to making decisions concerning their finances.

MARKET ANALYSIS

•The online investment platform market is aggressively rising at a CAGR of 14.4% till $4.4 billion by the year 2028 due AI introducing and popularity of digital investment rising. The main variables are the incorporation and application of AI algorithms for data analysis and risk management together with increasing investments that are a direct result of economic growth, and the increase of High Net Worth Individuals (HNWIs) on digital assets. Disadvantages such as hard regulatory requirements may stop penetration into new markets. In the process of development, the market is subject to the influence of the blockchain technology spread and to a great extent influenced by effect of the COVID-19 pandemic which was considered as the catalyst for the increased volume of investments via digital platforms.

PERSONAS

- **Name:** Priya
- **Age:** 23
- **Occupation:** College student in the final year, aspiring to start her own business.
- **Investment Experience:** Minimal experience.
- **Goals:** To acquire investment management skills for better financial management.
- **Challenges:** Unable to balance academic responsibilities, entrepreneurial planning and investment learning.

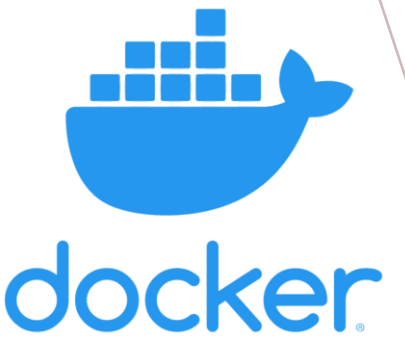
PERSONAS

- **Name:** Sara
- **Age:** 20
- **Occupation:** College student majoring in English Literature.
- **Investment Experience:** None.
- **Goals:** Interested in learning about personal finance and investing to start saving for the better future
- **Challenges:** Unable to understand the financial terms

PERSONAS

- **Name:** Michael
- **Age:** 25
- **Occupation:** College student majoring in finance.
- **Investment Experience:** No practical experience.
- **Goals:** To gain hands-on experience in the stock market using his classroom knowledge.
- **Challenges:** Finds it difficult to apply his theoretical knowledge in real-world

TECH STACK



Sprint Table

Task	Duration	Assigned to
Idea Finalization	2 Days	Entire team
Roles & Responsibilities	1 Day	Entire team
Research on investment theories	2 Days	Machine learning team
Tech stack finalization	3 Days	Entire team
Team agreement	1 day	Entire team
Sprint 1 documentation	2 Days	Entire team

TEAM AGREEMENT

TEAM AGREEMENMT

- Everyone should respect each other's opinion and can correct if they have any mistake, we take a poll in the team meeting on the workflow and the majority will be the final decision.
- Inappropriate behavior is prohibited and will be informed to professor and necessary action could be taken.
- Everyone should have equal contribution in the project and should help each other in completing it.
- Everyone should contribute their time in completing the project on every Wednesday and Sunday by attending the meetings.
- Missing of team meetings is not encouraged and the time of the meetings for the specified days will be intimated a day prior.
- All work specified should be completed in time and if you need any support, can reach out other team members for help but no extra time is given.
- All communication is done via slack and all team members should actively participate in it.

Teammates signatures

1. Venkatesh Nidumukkala
2. Ankit Mhatre
3. Uma
4. Tejaswi Koppula
5. Charan Raju M
6. Kilaru Mani Chandana

RETROSPECTIVE

WHAT WENT WELL

- Active communication
- Quick decision making

WHAT WE CAN IMPROVE

- Improve research
- Reduce overlapping of time

ACTION ITEMS

- Have recurring meetings
- Keep realistic goals

Sprint 2

- Design UI and implement Machine Learning.
- Start of backend.

WIKI LINK

https://github.com/htmw/2024S-pace-super-kings/wiki

THANK YOU