

Ideation Phase

Brainstorming – Idea Generation & Prioritization

Date	18 June 2025
Team ID	LTVIP2026TMIDS49230
Project Name	Gemini Pro Financial Decoder
Maximum Marks	4 Marks

Problem Statement Summary:

Financial analysts, executives, and journalists struggle to extract meaningful insights from complex financial documents such as Balance Sheets, Profit & Loss Statements, and Cash Flow Reports. The current process is manual, time-consuming, and error-prone.

- How Might We use AI (Google Gemini) to automate financial document analysis and deliver instant, clear, and actionable insights to different types of users?

Brainstormed Ideas

Idea 1 AI-Powered Financial Document Summarizer

Users upload Balance Sheet, P&L, or Cash Flow CSV/Excel files. The Gemini API analyzes the structured data using tailored prompt templates and generates a detailed, easy-to-understand financial summary highlighting key metrics, trends, and red flags.

Target Users: Financial Analyst (Sarah), CEO (Rajesh), Journalist (Mark)

Wow Factor: Reduces hours of manual document review to seconds.

Status: ■ Core Feature — Implemented in Project

Idea 2 Interactive Visual Dashboard with Charts

After AI analysis, automatically generate line charts, bar graphs, and trend visualizations from the uploaded financial data using Streamlit's built-in chart functions. Helps users visually interpret key financial metrics at a glance.

Target Users: CEO (Rajesh), Financial Analyst (Sarah)

Wow Factor: Transforms raw numbers into easy-to-understand visual stories.

Status: ■ Implemented — Streamlit Line Charts

Idea 3 Automated PDF Report Generation

After AI analysis and visualization, the application automatically generates a downloadable, structured PDF report containing summaries, key metrics, and visual insights using the ReportLab library. Users can share the report with stakeholders instantly.

Target Users: Financial Journalist (Mark), Analyst (Sarah)

Wow Factor: Professional, ready-to-share report generated in one click.

Status: ■ Implemented — ReportLab Integration

Idea 4 Multi-Document Comparative Analysis

Allow users to upload financial documents from multiple quarters or years simultaneously. The AI compares and highlights growth patterns, declining metrics, and anomalies across time periods — enabling trend analysis without manual comparison.

Target Users: Financial Analyst (Sarah), CEO (Rajesh)

Wow Factor: Identifies trends across time periods automatically.

Status: ■ Future Enhancement — High Value Feature

Idea 5 Plain Language Financial Explainer

Gemini translates complex financial jargon into simple, plain-language explanations. A CEO can ask 'Is this company profitable?' or 'What is our liquidity risk?' and receive a clear, jargon-free answer — making financial data accessible to non-finance users.

Target Users: CEO (Rajesh), Financial Journalist (Mark)

Wow Factor: Democratizes financial understanding for non-experts.

Status: ■ Implemented — Via Prompt Engineering

Idea 6 Financial Health Score & Risk Indicator

The AI computes a financial health score (0–100) based on key ratios like liquidity, profitability, leverage, and efficiency. The score is color-coded — Green (Healthy), Yellow (Caution), Red (At Risk) — providing an instant snapshot of company financial health.

Target Users: All Users — Analyst, CEO, Journalist

Wow Factor: Instant, visual financial health assessment at a glance.

Status: ■ Potential Enhancement — Prompt-Based Scoring

Idea Prioritization Matrix

Each idea is scored on Impact (1–5) and Feasibility (1–5). Total Score = Impact + Feasibility. Higher score = higher priority for implementation.

Idea	Impact (1–5)	Feasibility (1–5)	Total Score	Priority Level
AI Document Summarizer	5	5	10	■ Must Have
Visual Dashboard	5	5	10	■ Must Have
PDF Report Generation	4	5	9	■ High Priority
Plain Language Explainer	5	4	9	■ High Priority
Multi-Doc Comparison	5	3	8	■ Future Phase
Financial Health Score	4	3	7	■ Nice to Have

Selected Solution for Implementation

Based on prioritization, the team selected Ideas 1, 2, 3, and 5 for the current project sprint. The Gemini Pro Financial Decoder implements AI-powered document summarization, interactive visual dashboards, automated PDF report generation, and plain-language explanations — delivering maximum impact with high feasibility using Streamlit, Google Gemini API, LangChain, and ReportLab.