Trade Idea Generator Workflow

Objective

Automatically generate and publish a curated set of high-conviction trade ideas based on real-time macroeconomic conditions, sector trends, and company fundamentals.

This is not a conversational interface. Instead, it operates like an e-commerce-style discovery platform, where users browse trade ideas in a catalog-like interface. Each trade idea is a fully analyzed, research-backed product with a summary, metrics, and source links.

Users can: - Browse a feed of trade ideas based on market conditions - Filter by sector, region, risk profile, or strategy (value/growth) - Click into any idea to see full breakdown, sources, and insights - Follow-up or deep-dive on ideas using our Q&A agents

Sub-Agent Orchestration Logic

Flow:

1. Head Agent runs scheduled or manual idea generation (daily/weekly)
2. Phase 1: Market Scan
3. `MacroAgent` + `NewsAgent` assess the current economic climate
4. Determine if outlook is bullish, bearish, volatile, or sector-specific
5. Phase 2: Sector & Theme Discovery
6. `SectorTrendsAgent` recommends sectors/themes with upside
7. Phase 3: Idea Mining per Sector
8. For top sectors:
   - `EarningsAgent`, `ValuationAgent`, `RatioAgent`, `BalanceSheetAgent`, `CashflowAgent` pull key financials
   - `SentimentAgent`, `TranscriptAgent`, `RiskAgent` validate narrative and flag concerns
9. Phase 4: Trade Idea Curation
10. Head Agent ranks, scores, and packages ideas into readable profiles
11. Output → Pushed to UI for browsing

Agent Breakdown

Agent	Purpose
`MacroAgent`	Defines market backdrop
`NewsAgent`	Captures current events and catalysts
`SectorTrendsAgent`	Finds which sectors are gaining capital, media attention, or growth
`EarningsAgent`	Surfaces companies with strong recent earnings

Agent	Purpose
`ValuationAgent`	Filters undervalued stocks or those near price targets
`RatioAgent`	Adds profitability filters (ROE, margin, etc.)
`BalanceSheetAgent`	Evaluates solvency and debt load
`CashflowAgent`	Looks for positive cashflow, FCF, and CapEx efficiency
`TranscriptAgent`	Looks for optimism or risk in recent management communication
`RiskAgent`	Flags any deal-breakers or vulnerabilities
`SentimentAgent`	Measures social confidence & hype

Output Schema

```json
{
  "macro_outlook": "bullish",
  "sectors": ["Green Energy", "Defense", "Fintech"],
  "ideas": [
    {
      "name": "StockName",
      "sector": "Green Energy",
      "summary":
"This company has rising earnings, is undervalued vs peers, and has strong
positive sentiment.",
      "metrics": {
        "eps_growth": "22% YoY",
        "pe_ratio": 14.3,
        "roe": "18%",
        "debt_to_equity": 0.3
      },
      "sentiment": "bullish",
      "risk": "Low",
      "confidence": "High",
      "sources": ["AlphaVantage", "Reddit", "TradingEconomics"]
    }
  ]
}
```

Visual Design Philosophy

- Card-based UI for each idea (like products on Amazon)
- Filter sidebar: Sector, Market Cap, Risk Level, Strategy Type
- Detail view per idea: summary, agent insights, citations, explore deeper with chat
- Call-to-action: Save to watchlist, run Q&A on this idea, share

Example Use Cases

- User lands on homepage and sees 5 fresh trade ideas
- Filters to "Low Risk + Undervalued + Fintech"
- Clicks into "Company X" → reads agent cards, sentiment, risk summary
- Uses Chat to ask, "Why is its debt low compared to peers?"

Future Enhancements

- Tag ideas by investment strategy: Value, Growth, Momentum, Dividend
- Follow sectors or themes (like tags)
- Add performance tracking (real returns over time)
- Integrate backtests, sentiment timelines, earnings season filters
- Premium tier: Early access to high confidence ideas