WiseStreet: The Future of Personalized Investment Intelligence

Overview

WiseStreet is an AI-native research and decision-making platform for retail investors.

We are building a **modular financial co-pilot** that combines multi-agent reasoning, real-time data analysis, and goal-driven workflows to give every user the clarity and conviction of a Wall Street research desk — without the jargon or complexity.

> "This isn't just another chatbot. WiseStreet is a thinking system for smarter investing."

Vision

To empower millions of investors — beginners and pros alike — with smart, explainable, always-on financial research that helps them: - Understand what's happening in the markets - Make better trade and allocation decisions - Grow wealth with clarity, not confusion

We believe the next Bloomberg Terminal won't look like a terminal. It'll look like **WiseStreet.**

Core Offerings (Phase 1)

We're launching with **three flagship agent-powered workflows** that solve real, painful problems for investors:

1. Retail Research Assistant

Problem: Retail investors are overwhelmed by noise, lack time, and can't do deep research.

Solution: Let them ask anything —

> "What's going on with Reliance?" or "Compare TCS vs Infosys."

The Head Agent routes this to specialized agents: - `NewsAgent` - `SentimentAgent` - `EarningsAgent` - `MacroAgent` - `ValuationAgent`

They return structured, explainable answers: summaries, risk highlights, valuation context — all stitched together by the Head Agent.

2. Trade Idea Generator

Problem: Most investors don't know where to begin. They want ideas, not data.

Solution: WiseStreet runs a pipeline of reasoning that: - Builds a macro view (bullish/bearish themes) - Filters sectors with growth potential - Runs company-level analysis - Scores and explains 3–5 trade ideas (buy/sell/hold)

Delivered in an e-commerce-style interface: each idea is a card with thesis, risk, evidence.

3. Portfolio Analyzer

Problem: Users hold stocks without knowing if they're good, risky, or aligned with goals.

Solution: - Connect portfolio via broker or CSV - WiseStreet audits it using agents: - `ValuationAgent`, `EarningsAgent`, `RiskAgent`, `DiversificationAgent` - Plus: `BehavioralAgent`, `GoalFitAgent`, `ScenarioAgent`

Delivers: - Summary of strengths, weaknesses - Personalized recommendations (hold/trim/exit/add) - Goal alignment score

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Why Now

- LLMs + tool calling = reasoning at scale
- Retail investing is exploding globally (India, SEA, Africa)
- APIs for market data are more accessible than ever
- OpenAI + Gemini + Claude = foundation-level infra for reasoning agents

Everyone is building wrappers. We're building **thinking systems.**

Architecture Summary

WiseStreet is powered by: - A **Head Agent** (LLM orchestrator) - A network of **Sub-Agents** (News, Earnings, Risk, etc.) - Each sub-agent can have its own tools (APIs, scrapers, models)

Each workflow uses different orchestration logic: - Research Assistant → 1-step question + response - Trade Ideas → Chain of thought + filters + explain - Portfolio Analyzer → Tree of agents auditing + scoring

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Who This Is For

- Retail investors on Groww, Zerodha, Robinhood
- Professionals tired of Excel and broken screeners

- People who want insights, not dashboards
- Financial advisors and creators
- Students and learners of finance

Philosophy

"AI isn't the product. It's the engine."

WiseStreet doesn't sell AI features. It solves real financial pain: - What should I buy? - Is my portfolio good? - What's the story behind this stock?

AI is just how we answer those better than anyone else.

We're not late. We're early. The race has just begun. Let's build.

Next Steps

- MVP: Terminal interface to test 3 workflows (Q3 2025)
- Feedback from 20–50 serious users
- Web UI v1 with trade idea board, portfolio upload
- Launch closed beta on Product Hunt and X

Tagline Ideas: - Think like an analyst. Invest like a pro. - The AI engine behind better financial decisions - From chaos to clarity — meet your financial co-pilot

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Let's go build the brain behind the next generation of wealth.