WiseStreet Agent Workflows Overview

We are defining multiple distinct agent workflows ("strategies") that reuse our core sub-agent infrastructure (macro, sentiment, earnings, valuation, news, etc.) but vary in: - Objective - Control logic / orchestration - Type of output

These workflows act as "templates" for different user goals. Each one can be thought of as a different "persona" or strategy powered by the same agent team.

Common Sub-Agents (Shared by All Workflows)

Agent	Role
`MacroAgent`	Understand global events, GDP, inflation, rates, central bank moves
`NewsAgent`	Aggregate & summarize recent news from APIs
`SentimentAgent`	Pull sentiment from Reddit, Twitter, YouTube
`EarningsAgent`	Analyze recent earnings reports (revenue, EPS, etc.)
`ValuationAgent`	Estimate valuation using models (DCF, P/E, peer comps)
`BalanceSheetAgent`	Analyze company assets, liabilities, liquidity, solvency
`CashflowAgent`	Examine free cash flow, operating cash flow, CapEx
`RatioAgent`	Pull profitability ratios like ROE, ROIC, margins
`TranscriptAgent`	Summarize earnings calls for tone, outlook, and red/green flags
`RiskAgent`	Flag risks: legal, debt, financial health, market exposure
`TechnicalAgent`	Surface technical trends like RSI, MACD, moving averages
`SectorTrendsAgent`	Identify hot sectors based on macro, capital flows, earnings

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Workflow 1: Retail Research Assistant (Default Setup)

Goal:

Answer user queries about companies, sectors, or macro themes with relevant insights.

Flow:

1. User asks a question: "What’s happening with Tesla?"
2. Head Agent identifies topic scope: `Company`

3. Routes query to:
    - NewsAgent
    - SentimentAgent
    - EarningsAgent
    - ValuationAgent
    - RiskAgent
4. Collects all data → summarizes in TL;DR for user

Output:

- Clear cards per agent
- Final summary with insight and recommendation

Workflow 2: Trade Idea Generator

Goal:

Automatically scan macro trends, sectors, and company fundamentals to propose high-conviction investment ideas.

Flow:

1. Head Agent triggers:
    - MacroAgent + NewsAgent → Understand current economic conditions
2. Interprets market environment:
    - Bullish, Bearish, Neutral, Volatile, etc.
3. Based on view → scans promising sectors:
    - SectorTrendsAgent → picks active industries
4. Within sectors:
    - EarningsAgent → Finds high-growth, improving fundamentals
    - BalanceSheetAgent + CashflowAgent + RatioAgent → Assess financial strength
    - ValuationAgent → Screens for undervaluation
5. Final filtering:
    - SentimentAgent → Check public mood
    - TranscriptAgent → Red/green flags
    - RiskAgent → Exclude risky bets
6. Returns:
    - 2–3 top picks with rationale

Output:

- Trade idea name
- Thesis: Why now?
- Risks, metrics, data cards
- Confidence level: High / Medium / Speculative

Ideas for Other Workflows

Portfolio Analyzer

- Input: CSV or JSON of user holdings
- Workflow:
    1. For each stock:
        - NewsAgent
        - EarningsAgent
        - ValuationAgent
        - RiskAgent
        - BalanceSheetAgent
        - CashflowAgent
    2. Flag underperformance, risks
    3. Suggest rebalancing

Explain Like I'm 15

- Any financial topic entered
- All agent output summarized in ultra-simple English

Deep Dive Mode

- Ask: "Full breakdown of Adani Enterprises"
- Response structure:
    1. Macro Fit
    2. Sector Dynamics
    3. Fundamentals (Earnings, Ratios, Balance Sheet, Cashflow)
    4. Sentiment
    5. Valuation
    6. Risk Map
    7. Transcript summary
    8. Bull vs Bear case

Next Step:

Let's pick 2–3 workflows to detail in standalone markdown docs: 1. `retail_research_assistant.md` 2. `trade_idea_generator.md` 3. `portfolio_analyzer.md`

Each doc will define: - Objective - Sub-agent orchestration logic - Expected output schema - Example prompts - Future enhancements