

WiseStreet : AI-powered investment research assistant for retail investors

1. What is WiseStreet?

WiseStreet is an AI-powered investment research assistant for retail investors.

It gives anyone — even non-experts — the power of a full financial research team through a chat-based, smart interface powered by multi-agent AI.

It's like having a personal Wall Street analyst who reads everything, understands trends, connects the dots — and explains it all to you in plain English.

2. Why Are We Building This?

The Problem:

Retail investors are flooded with:

- Complicated financial data
- Too many news sources
- Confusing stock market noise
- Lack of clear, actionable insights

Most don't know:

- What data matters
- How to interpret earnings
- What macroeconomics mean for stocks
- How to research deeply before investing

Our Solution:

We build **WiseStreet** — a simple interface backed by **intelligent agents** that:

- Read financial news, earnings, forums, data, reports
- Think like analysts
- Return clear, well-structured answers
- Guide people like a co-pilot

3. What Will WiseStreet Do?

MVP Features (Minimum Viable Product)

1. Ask Anything (ChatGPT-style Interface)

- Users can ask:
 - "What's happening with Reliance?"
 - "Compare TCS vs Infosys."
 - "How will the RBI interest rate impact mid-cap banks?"

2. Head Agent (Query Router)

- Detects the topic of the question:
 - Macro, company, sector, theme

- Sends the task to specialized sub-agents

3. **Sub-Agents** (For now: 3 main agents)

- **News Agent:** Pulls and summarizes latest financial news
- **Sentiment Agent:** Analyzes Twitter, Reddit, YouTube comments
- **Earnings Agent:** Parses key financials from APIs
- **Macro Agent:** Understands macroeconomic shifts and trends
- **Valuation Agent:** Calculates and compares valuation metrics

4. Structured Agent Cards

- Each agent displays a structured card:
 - Title
 - Summary
 - Key metrics
 - Visualizations (charts, sentiment graphs, etc.)
 - Source links

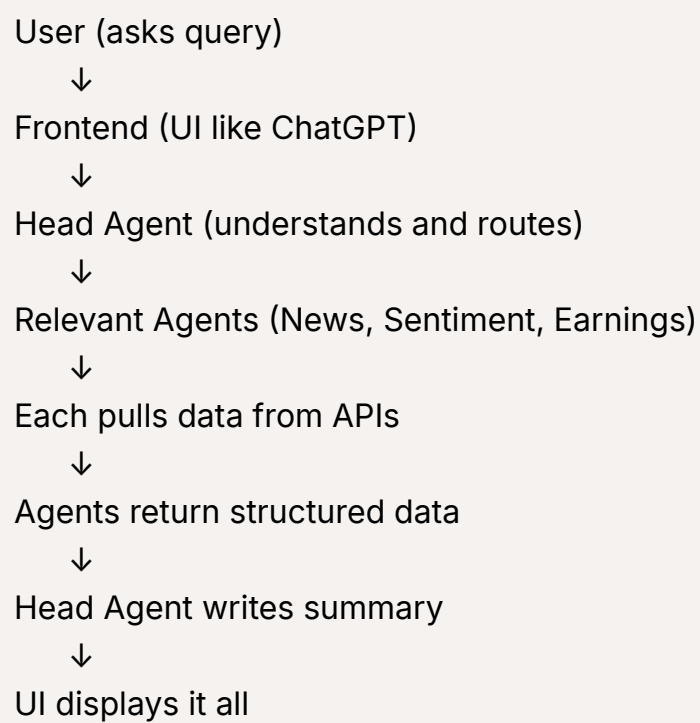
5. **Smart Summary**

- Head Agent combines all responses into a simple TL;DR

6. **Report Download (Optional in MVP+)**

- Export insights as a shareable PDF

4. System Architecture



5. The Agent System

Head Agent

- LLM-based orchestrator
- Responsibilities:
 - Classify the query
 - Assign task(s) to one or more agents
 - Aggregate and synthesize final output

Sub-Agents

Agent	Role	Input	Output
News Agent	Fetches & summarizes latest news	Stock/ticker/sector/topic	Bullet-point news digest + key headlines
Sentiment Agent	Analyzes public mood from social media	Keyword/sector	Sentiment score (bullish/bearish), sample posts
Earnings Agent	Pulls financial metrics, highlights earnings performance	Company ticker	YoY growth, revenue, EPS trends, net income
Macro Agent	Gathers macroeconomic indicators & global events	Market-level query	Impact of rates, inflation, war, etc. on stocks/sectors
Valuation Agent	Calculates valuation metrics & comparisons	Stock ticker	P/E ratio, DCF range, peer comparison, fair price target

All return structured JSON or Markdown blocks.

6. Frontend Design

UI Style: Minimal + Modern (ChatGPT inspired)

Section	Content
Search/Input Bar	User types financial questions
TL;DR Box	Final answer from Head Agent
Agent Cards	News
Visuals	Sentiment score, price trend, earnings charts
Sources	Each agent card has "Sources" button/link
Footer	Disclaimer + info

7. Tech Stack

Layer	Technology
Frontend	Next.js + Tailwind + shadcn/ui
Backend	Go / Python
Agents	GPT-4o (via OpenAI API)
Data APIs	

- News: NewsCatcher, Bing News
 - Sentiment: Reddit, Twitter, YouTube API
 - Earnings: Alpha Vantage, FMP
- | **Deployment** | Vercel (frontend) + Railway/Fly.io (backend) |
- | **Auth (later)** | Clerk/Auth0 (for user accounts) |
- | **Optional** | PostgreSQL (for storing history/favorites) |

8. Milestones and Timeline

Week	Task
Week 1	UI setup + routing system + mock agents
Week 2	Integrate News Agent with API
Week 3	Sentiment Agent + visualization
Week 4	Earnings Agent + Head Agent synthesis
Week 5	UI polish + summary composer
Week 6	Demo deployment + video + pitch deck

9. Example User Flows

Case 1: Company query

“What’s happening with HDFC Bank?”

1. Head Agent → Company domain
2. Calls News + Sentiment + Earnings agents
3. Displays cards + writes TL;DR
4. Shows visual charts + links

Case 2: Macro query

“How will interest rates affect real estate?”

1. Head Agent → Macro domain
2. Calls News + Macro agent (v2)
3. Returns analysis + source links

10. Ideal Users

- Gen-Z and millennial investors
- Anyone using Zerodha, Groww, Kuvera, Upstox
- Finfluencer followers and curious retail learners
- People building long-term portfolios

11. Naming & Tagline

Name: WiseStreet

Tagline ideas:

- *Wall Street clarity for everyone*
- *Smarter investing made simple*
- *Your personal investing co-pilot*
- *Think like a pro. Invest like a boss.*

Summary

WiseStreet is not a chatbot — it’s an **AI-native research system** that thinks like an analyst, acts like a team, and communicates like a smart friend.

We are:

- Empowering the 99%
- Explaining finance in plain English
- Making market research beautiful, real-time, and useful