

***Generic Entry Form (for Startup Competitions/Title Hearing)***

Name of Startup (max of 2 words)

RoboAdvisor

Describe your Startup in brief (max of 10 words)

AI-powered financial advisor for portfolio management and smart recommendations.

Project Manager - Hustler

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System Analyst/Database Designer; Network /UI Designer - Hipster

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## **Executive Summary** (*Bullet points are acceptable, but put details as possible*)

**THE NEED:** What is the need or customer pain point that you are solving? Why will your startup make the world a better place? (max of 50 words)

*People want to invest but often lack the time, knowledge, or confidence to do it well. Our robo-advisor makes investing accessible by using technology to automate portfolio management, reduce costs, and provide AI-driven insights—making smart investing easier, faster, and available to everyone.*

**THE MARKET** What is the market of your startup, locally and globally? Define the size of the market from the perspective of the product defined. You may include data or findings that show the potential impact and opportunity of your product/service. (max of 150 words)

*Financial literacy and investment access are uneven across both developed and emerging markets. As people seek smarter ways to grow their money, there's increasing demand for low-cost, tech-driven investment tools. Robo-advisors address this by automating investment management, lowering entry barriers, and scaling financial advice through AI. According to Statista, the global robo-advisor market is expected to reach \$3.2 trillion in assets under management (AUM) by 2028, up from \$1.5 trillion in 2023. Growth is driven by younger, tech-savvy investors and global shifts toward digital finance. Locally, adoption is growing in parallel with increased smartphone penetration and digital banking. As investors become more comfortable with algorithm-based decision-making, robo-advisors are well-positioned to meet rising expectations for accessibility, efficiency, and personalization in wealth management.*

**THE TECHNOLOGY** Is your technology novel, unique, or disruptive? Describe how your idea works. Why is your proposed technology miles apart from the rest?

*Our technology makes investing smarter by combining modern portfolio theory with real-time machine learning and AI-driven recommendations. The goal is to democratize wealth management by automating portfolio optimization and delivering personalized insights to users. Unlike traditional robo-advisors that focus solely on asset allocation, our platform continuously adapts to market trends and user behavior using ML, and provides explainable recommendations in natural language. It's novel because it integrates sentiment analysis, macroeconomic indicators, and behavioral data to inform investment decisions. It's unique because it doesn't just manage money.*

*How it works:*

1. User completes onboarding questionnaire.
2. The algorithm generates a diversified portfolio using risk scoring.
3. Real-time data feeds (e.g., market, news, sentiment) update risk profile.
4. AI models adjust allocations and generate recommendations via Hugging Face API.
5. Users view portfolio changes and plain-language insights in a clean web dashboard.

**THE TEAM** Why are you the men/women to make this idea into a global business? (Remember that you have a minimum of 2 and a max of 3 members per entry with at least 1 technical lead. Also, indicate the roles of each member. (max of 200 words)

*Marc Louise Goco handles the tech side. Deep experience in mobile apps and AI integration means he'll build the backend. He'll make sure itinerary generation works smoothly. Real-time updates and cloud stuff stay reliable and secure.*

*Bryce Mendez does UX design work here. She focuses on building interfaces people actually enjoy using. Makes portfolio planning simple through a mobile dashboard that connects with users worldwide.*

*Han Song Carl Malalay deals with systems and security. Guy knows cloud systems inside out from previous gigs. Handles keeping travel data locked down tight while making sure info shows up instantly when you need it.*

*Joshua Mercado runs marketing and messaging. Comes from a content creation background mixed with business strategy chops. He'll shape how we communicate to different cultures globally. Making sure the brand's story sticks in people's minds wherever they are.*

*Our combined strengths cover all bases for this project. Tech innovation meets design that doesn't confuse people under pressure. Security you can trust paired with marketing that actually lands. We've got the right mix to turn this into everyone's go-to travel app worldwide.*

**SYNERGY. Which industry is the closest fit to your product solution? (Please check)**

- Agriculture
- Commerce
- Communications
- Disaster Preparedness and Response
- Education
- Environment
- Governance
- Health
- Home
- Livelihood
- Media and Entertainment
- Mobile Solutions
- People-on-the-Go
- Power and Energy
- Transportation
- Others (Please specify,) \_\_\_\_\_ Software as a Service

*I certify to the best of my knowledge that the idea submitted is original.*

  
Marc Louise Goco  
Signature over printed name of Project Manager

September 5, 2025  
Date Signed/Submitted