# INVESTOR INTELLIGENCE AGENT

FOR ISY 5005 INTELLIGENT SOFTWARE AGENTS (ISA) PROJECT MODULE

## BUSINESS PLAN & VALUE PROPOSITION


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INTRODUCTION

BIZ VALUE

BIZ PLAN

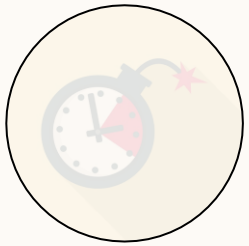
USE CASES

PRICING

# TRADITIONAL INVESTMENT RESEARCH CHALLENGES

### Multiple Data Sources

- Overwhelming information available



### Time Constraints

- Quick decisions required to rapidly changing market conditions

### Manual Processes

- Inefficiencies in data gathering, summarizing and analyzing

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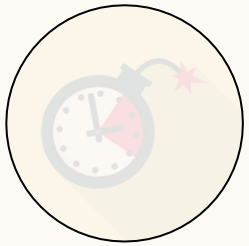

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# COMPETITORS



**Bloomberg**

- Real-time market data and in-depth financial analysis
- Extensive global market coverage
- Customisable reports for users
- Premium pricing
- Complex interface

**Thomson Reuters**

- Diverse product portfolio
- Trusted brand
- Industry expertise
- Premium pricing
- Integration challenges

# TRENDS



## Assisted Investing

- AI-driven investment support is revolutionizing the industry, providing more efficient and sophisticated tools for advisors and investors.

## Sustainability Focus: Increased commitment to ESG practices within financial services

- There is a rising dedication to environmental, social, and governance (ESG) practices within the realm of financial services

## Financial Innovation and Integration

- Secure APIs, blockchain technology, and advanced analytics are spearheading the integration of open banking, digital currencies, and digitalized asset management, enhancing the financial sector's efficiency and innovation

# VALUE PROPOSITION



| | |
|---|---|
| **Small to Mid-sized Investment Firms and Individual Investors** | ✓ **Empowers smaller firms and individual investors with actionable insights and data-driven decision-making capabilities** |
| Comprehensive ESG Integration and Regulatory Monitoring | ✓ Recognizes growing importance of sustainability in investment decisions<br>✓ Holistic understanding of impact of investments on environmental and social factors |
| Advanced Analytical Capabilities | ✓ AI-driven analytics to assess investment risks, and evaluate ESG factors to enable users to make data-driven investment decisions. |

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# SYSTEM FEATURES

Streamlining Data Gathering

Real-Time News Analysis

ESG Integration

Competitor Analysis

Financial Technical and Fundamental Analysis with Adaptive Neuro-Fuzzy Inference System

**Future Development**

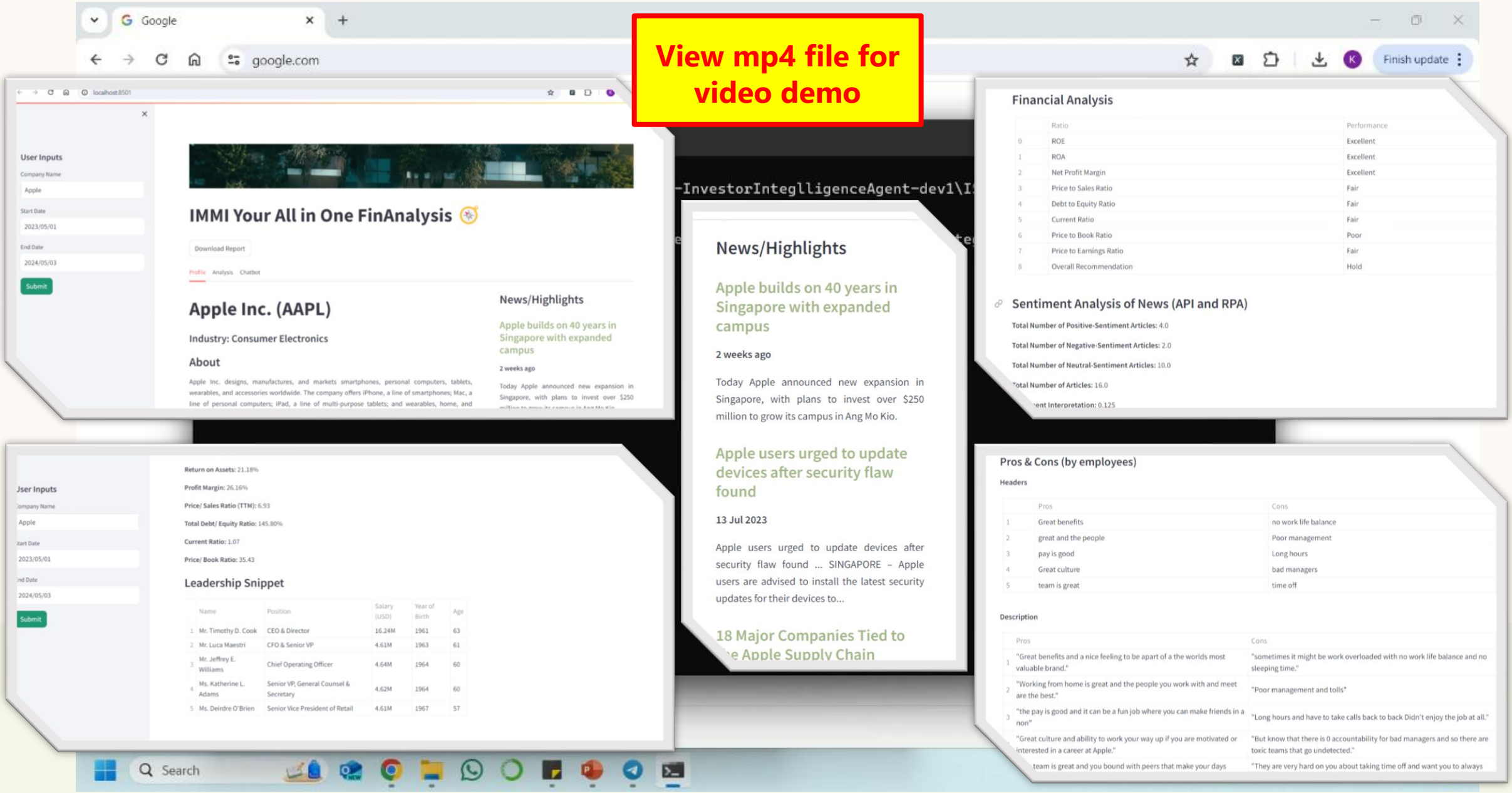
- Enhanced Web Scraping Capabilities
- Advancements in ESG Analysis
- Improved Competitor Analysis
- Development of Performance Benchmarks

# PRODUCT DEMO

Note that RPA processes are shown at 4 times speed



**View mp4 file for video demo**



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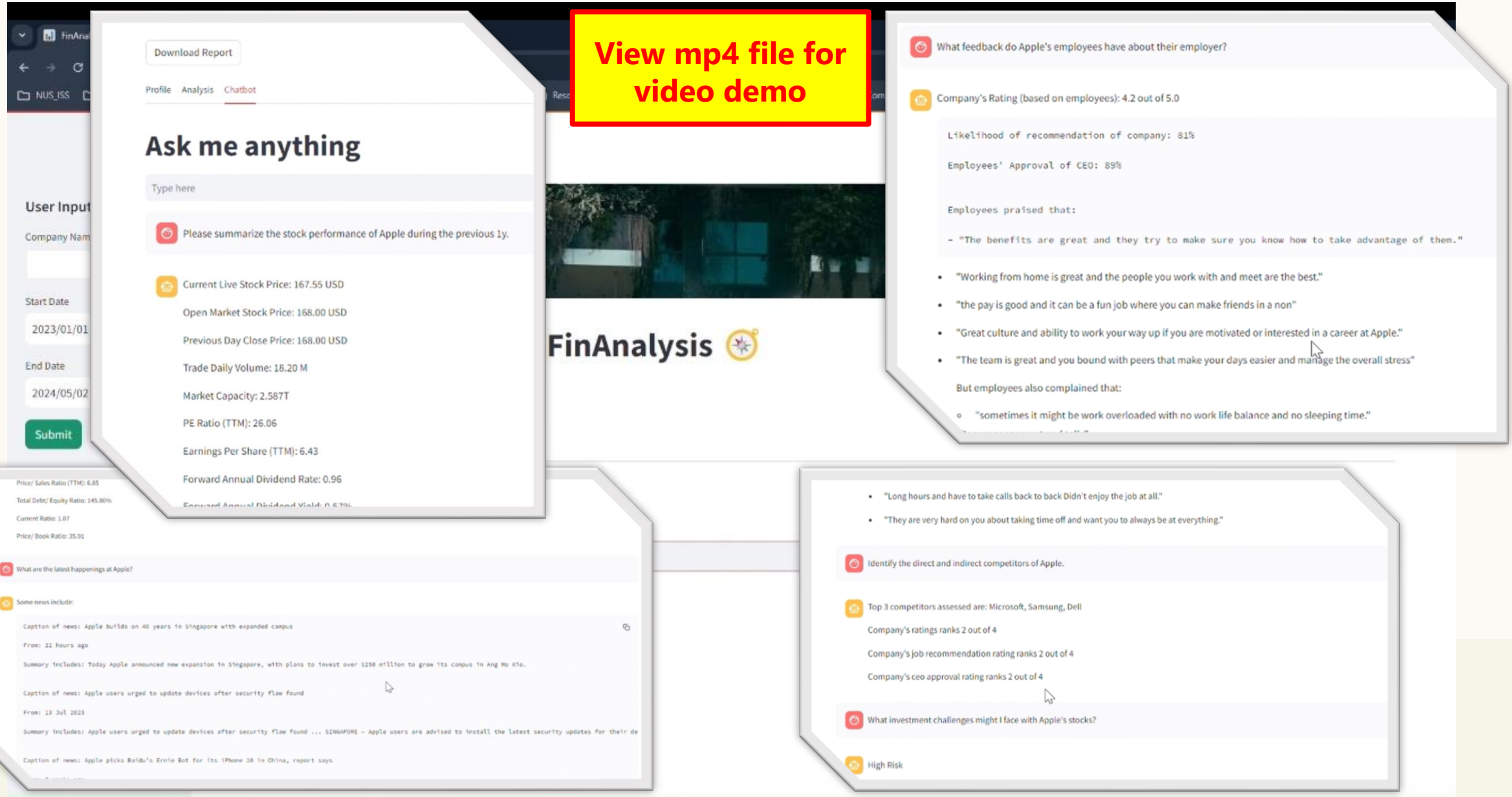

# PRICING MODEL

## Investors and Consulting Firms

- Free access during the launch phase to attract a substantial user base and encourage widespread usage.
- Domain experts will provide valuable feedback, contributing to system improvements.

**3 Pricing Categories:**

- Subscription Model: Tiered pricing based on firm size and functionality needs.
- Pay-Per-Report: Option to purchase individual reports suitable for smaller firms or less frequent users.
- Licensing: Technology available for integration into larger firms' systems.

## Corporate Entities

- Value-adding services aim to provide insights into key investor-assessed metrics to improve company standings and performance.
- Offer paid reports and workshops sharing data insights of top-performing companies in the same industry.

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