

INVESTOR INTELLIGENCE AGENT

FOR ISY 5005 INTELLIGENT SOFTWARE
AGENTS (ISA) PROJECT MODULE

**BUSINESS PLAN &
VALUE PROPOSITION**

YATHARTH MAHESH SANT | A0286001R
KRISTOFER ROOS | A0285949A
GOH MIN HUA | A0285810A
ZHANG EUNICE | A0287088L
CHUA KIAN YONG KENNY | A0056377W

CONTENT

1. Introduction
2. Business Value
3. Business Plan
4. Use Cases Demo
5. Proposed Pricing



INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



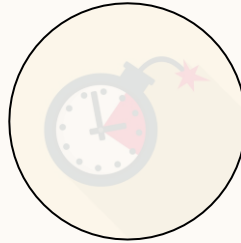
PRICING

TRADITIONAL INVESTMENT RESEARCH CHALLENGES



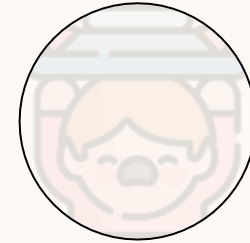
Multiple Data Sources

- Overwhelming information available



Time Constraints

- Quick decisions required to rapidly changing market conditions



Manual Processes

- Inefficiencies in data gathering, summarizing and analyzing



INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



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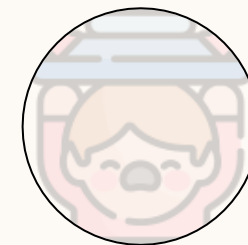
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INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



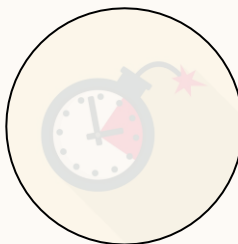
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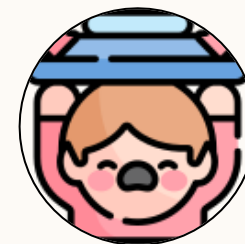
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INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



PRICING

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



INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



PRICING

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



INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



PRICING

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
- ✓ 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.



INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



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INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



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INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



PRICING

SYSTEM FEATURES

11



Streamlining Data Gathering



Competitor Analysis



Real-Time News Analysis



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



ESG Integration

Future Development

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



INTRODUCTION



BIZ VALUE



BIZ PLAN



USE CASES



PRICING

Google

google.com

View mp4 file for
video demo

User Inputs

Company Name
Apple

Start Date
2023/05/01

End Date
2024/05/03

Submit

IMMI Your All in One FinAnalysis

Download Report

Profile Analysis Chatbot

Apple Inc. (AAPL)

Industry: Consumer Electronics

About

Apple Inc. designs, manufactures, and markets smartphones, personal computers, tablets, wearables, and accessories worldwide. The company offers iPhone, a line of smartphones; Mac, a line of personal computers; iPad, a line of multi-purpose tablets; and wearables, home, and

News/Highlights

Apple builds on 40 years in Singapore with expanded campus

2 weeks ago

Today Apple announced new expansion in Singapore, with plans to invest over \$250 million to grow its campus in Ang Mo Kio.

InvestorIntelligenceAgent-dev1

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Apple builds on 40 years in Singapore with expanded campus

2 weeks ago

Today Apple announced new expansion in Singapore, with plans to invest over \$250 million to grow its campus in Ang Mo Kio.

Apple users urged to update devices after security flaw found

13 Jul 2023

Apple users urged to update devices after security flaw found ... SINGAPORE – Apple users are advised to install the latest security updates for their devices to...

18 Major Companies Tied to the Apple Supply Chain

Financial Analysis

	Ratio	Performance
0	ROE	Excellent
1	ROA	Excellent
2	Net Profit Margin	Excellent
3	Price to Sales Ratio	Fair
4	Debt to Equity Ratio	Fair
5	Current Ratio	Fair
6	Price to Book Ratio	Poor
7	Price to Earnings Ratio	Fair
8	Overall Recommendation	Hold

Sentiment Analysis of News (API and RPA)

Total Number of Positive-Sentiment Articles: 4.0

Total Number of Negative-Sentiment Articles: 2.0

Total Number of Neutral-Sentiment Articles: 10.0

Total Number of Articles: 16.0

Sentiment Interpretation: 0.125

Pros & Cons (by employees)

Headers

	Pros	Cons
1	Great benefits	no work life balance
2	great and the people	Poor management
3	pay is good	Long hours
4	Great culture	bad managers
5	team is great	time off

Description

	Pros	Cons
1	"Great benefits and a nice feeling to be apart of a the worlds most valuable brand."	"sometimes it might be work overloaded with no work life balance and no sleeping time."
2	"Working from home is great and the people you work with and meet are the best."	"Poor management and tolls"
3	"the pay is good and it can be a fun job where you can make friends in a non"	"Long hours and have to take calls back to back Didn't enjoy the job at all."
	"Great culture and ability to work your way up if you are motivated or interested in a career at Apple."	"But know that there is 0 accountability for bad managers and so there are toxic teams that go undetected."
	team is great and you bound with peers that make your days	"They are very hard on you about taking time off and want you to always

PRODUCT DEMO

Note that processes are shown at 4 times speed

13

View mp4 file for video demo

Download Report

Profile Analysis **Chatbot**

Ask me anything

Type here

Please summarize the stock performance of Apple during the previous 1y.

Current Live Stock Price: 167.55 USD

Open Market Stock Price: 168.00 USD

Previous Day Close Price: 168.00 USD

Trade Daily Volume: 18.20 M

Market Capacity: 2.587T

PE Ratio (TTM): 26.06

Earnings Per Share (TTM): 6.43

Forward Annual Dividend Rate: 0.96

Forward Annual Dividend Yield: 0.57%

Price/ Sales Ratio (TTM): 6.85

Total Debt/ Equity Ratio: 145.80%

Current Ratio: 1.87

Price/ Book Ratio: 35.01

What are the latest happenings at Apple?

Some news include:

Caption of news: Apple builds on 40 years in Singapore with expanded campus

From: 22 hours ago

Summary includes: Today Apple announced new expansion in Singapore, with plans to invest over \$250 million to grow its campus in Ang Mo Kio.

Caption of news: Apple users urged to update devices after security flaw found

From: 13 Jul 2023

Summary includes: Apple users urged to update devices after security flaw found ... SINGAPORE - Apple users are advised to install the latest security updates for their de

Caption of news: Apple picks Baidu's Ernie Bot for its iPhone 16 in China, report says

FinAnalysis

What feedback do Apple's employees have about their employer?

Company's Rating (based on employees): 4.2 out of 5.0

Likelihood of recommendation of company: 81%

Employees' Approval of CEO: 89%

Employees praised that:

- "The benefits are great and they try to make sure you know how to take advantage of them."

• "Working from home is great and the people you work with and meet are the best."

• "the pay is good and it can be a fun job where you can make friends in a non"

• "Great culture and ability to work your way up if you are motivated or interested in a career at Apple."

• "The team is great and you bound with peers that make your days easier and manage the overall stress"

But employees also complained that:

• "sometimes it might be work overloaded with no work life balance and no sleeping time."

• "Long hours and have to take calls back to back Didn't enjoy the job at all."

• "They are very hard on you about taking time off and want you to always be at everything."

Identify the direct and indirect competitors of Apple.

Top 3 competitors assessed are: Microsoft, Samsung, Dell

Company's ratings ranks 2 out of 4

Company's job recommendation rating ranks 2 out of 4

Company's ceo approval rating ranks 2 out of 4

What investment challenges might I face with Apple's stocks?

High Risk

PRICING MODEL

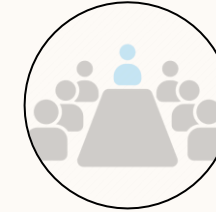


Investors and Consulting Firms

- 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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