Your new AI Financial Copilot for Financial Advisors is here

Streetbeat

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Agenda

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- Charlie's Agents in action
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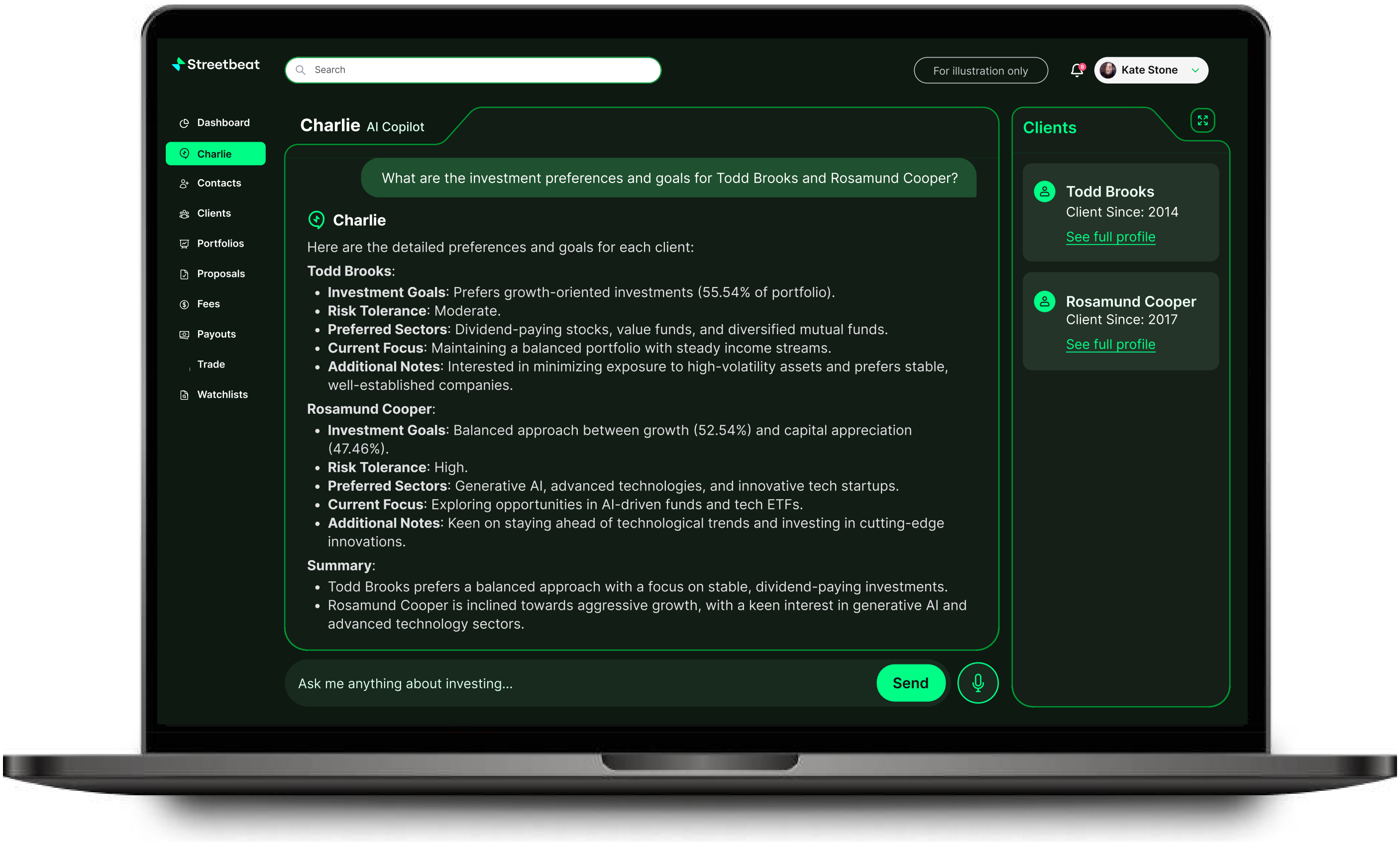
Charlie - The AI Copilot for Financial Advisors

We live in a time where the demands on financial advisors are greater than ever. The need to manage multiple clients efficiently while providing personalized, high-quality advice is paramount. **This is where Charlie, Streetbeat AI Copilot for Financial Advisors, steps in.**

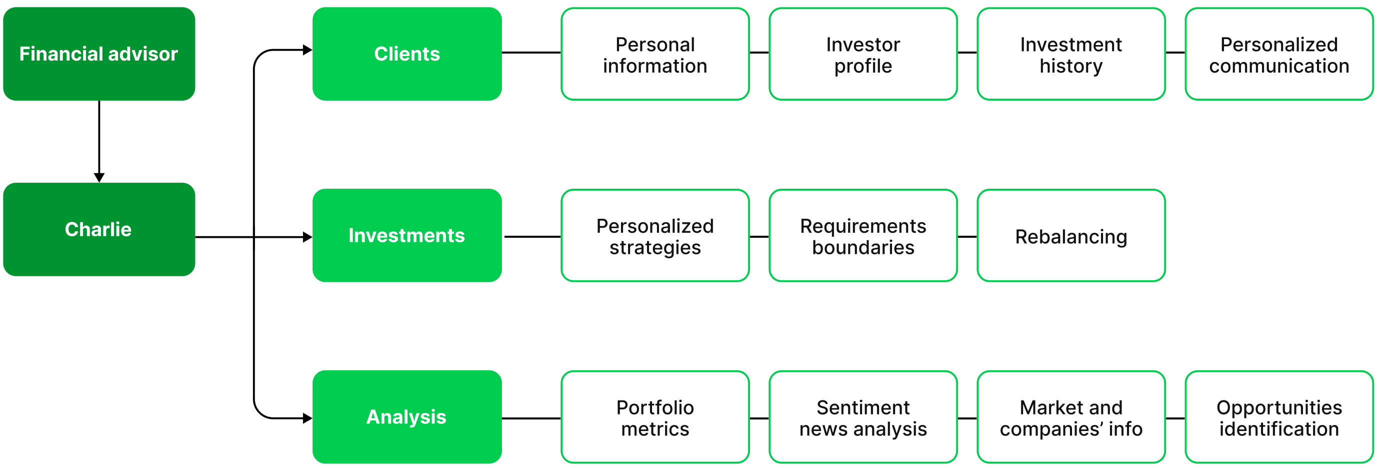


The platform was born from our commitment to **empower financial advisors** with the most advanced AI-powered tools available. It enables advisors to manage more clients efficiently without compromising service quality. It ensures every interaction is **personalized and aligned with client's goals and interests.**

The Charlie API integrates seamlessly into your company's ecosystem.

It's a full white label solution.

For financial institutions, Charlie offers unprecedented control over the financial products and services provided to clients. By adhering to selected financial logics and institutional guidelines, **Charlie generates offers that are both compliant and tailored to the institution's strategic objectives**. This enhances the ability to scale advisory services while maintaining a high-quality client experience.



In essence, **Charlie is a transformative solution**, elevating financial advisors' and institutions' capabilities, driving client satisfaction, and fostering financial growth.

Empower your Financial Advisors

1	Advanced portfolio management	• Creation of customized portfolios in line with **your company's logic and regulatory entities** requirements • **Dynamic adaptation** to market conditions and client goals
2	Intelligent automation	• **Automatic rebalancing** at predetermined frequencies based on market events and client objectives • **Automated execution** of routine operations, freeing up time for value-added activities
3	Portfolio analysis	• Advanced portfolio analysis using **your company's logic** for the creation and advisory of bond portfolios
4	Enhanced client communication	• Automated generation of **personalized content** for emails, SMS, reports, and summaries • Creation of **customized newsletters and market updates** for each client • Preparation of **professional presentations** for client meetings
5	Operational efficiency	• **Up to 90% reduction in time spent** on financial and technological management • Ability to manage up to **twice as many clients per month**, freeing up 15 hours per week typically spent on research, analysis, financial planning, and administrative tasks
6	Market expansion	• Effectively serve clients with **smaller assets** • **Scale the business** without compromising service quality • Opportunities to penetrate **new market segments**

7	**Hyper-Personalization**	• Creation of **tailor-made portfolios** based on client preferences, goals, and risk tolerance • Continuous and a**utomatic updates** aligned with evolving client needs • **Personalized investment advice** based on behavioral and financial analysis
8	**Technological competitive advantage**	• Differentiation from competitors through **cutting-edge AI technology** • Positioning as an **innovative and forward-thinking** financial advisor • Attraction of tech-savvy and innovation-oriented clients
9	**360° knowledge of your offering**	• Instant access to your entire **range of products and services** • Simplification of the **training and updating process** for advisors • Precise and relevant **product recommendations** for each client situation
10	**Seamless system integration**	• Integration with existing **CRM and portfolio management** systems • **Automatic data synchronization** for a unified view of the client • Reduction of manual errors and improved **data integrity**
11	**Smart meeting preparation**	• Automatic generation of **daily reports** on client portfolios to be met • **Detailed analyses** including past and present client interests • Summaries of **weekly impacts** on the client's assets
12	**Mobility and accessibility**	• Full functionality access via mobile app • Real-time market information and client data always at hand • Ability to provide professional advice from anywhere

Sources: internal data

Empower yourself

1	**Increased productivity and AUM growth**	• Enhanced **operational efficiency** for advisors • Ability to **manage more clients** • Growth in assets under management per advisor
2	**Improved client service**	• Advanced **personalization** of offerings • Faster and more accurate responses to client needs • Potential organic growth in AUM due to higher client satisfaction
3	**Operational cost optimization**	• Reduction of manual and administrative tasks • **Decrease in human errors** and associated costs • Better allocation of human resources to **value-added activities**
4	**Enhanced risk management**	• Continuous **portfolio monitoring** for potential risks • Rapid **adjustment** to market fluctuations • Automated **compliance** with evolving regulations
5	**Business scalability**	• Ability to **expand client base** without proportional staff increase • **Standardization of advisory processes** while maintaining personalization • **Expansion into new markets** or segments with fewer operational barriers
6	**Increased retention**	• **Higher satisfaction among advisors** due to advanced tools • Reduction in staff turnover • Creation of an **innovative and stimulating work environment**

7	Better alignment with banking guidelines	• Uniform implementation of **corporate strategies** • **Rapid portfolio adjustments** to new directives • Greater control over portfolio **compliance** with internal policies
8	Reduction of bias in portfolio creation	• Investment decisions based on **objective data** • Greater consistency in investment **recommendations** • **Mitigation of risks** associated with human biases
9	Increased cross-selling and up-selling	• Automatic identification of cross-selling opportunities • Personalized up-selling suggestions based on AI analysis • Increased customer **lifetime value**
10	Advanced performance monitoring of advisors	• Detailed analysis of individual **advisor performance** • Rapid **identification** of areas for improvement • **Optimization** of personnel management strategies
11	Enhanced customer experience	• **24/7 customer service** through AI assistant • **Reduced response times** for client inquiries
12	Reduce Onboarding and Training Costs	• The AI can assist Financial Advisors in **identifying the most suitable offerings** without requiring them to memorize all the product offering and extensive details • Onboarding new Financial Advisors becomes **more efficient**, as they require less training and receive initial support directly from the AI system

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> Charlie capabilities

Charlie's Agents in action

About Streetbeat

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Charlie features

Conversational AI

Access to Charlie's capabilities to perform advanced tasks

Portfolio builder

Portfolios created using approved assets

Portfolio proposals

Respecting regulatory requirements and clients' profile

Portfolio management

Executing automated portfolio rebalancing

Market News

Relevant updates and news articles impacting market conditions

Sentiment Analysis

Utilizes NLP techniques to evaluate the sentiment of news articles

Screening

Identify financial instruments opportunities based on set criteria

Stock Performance

Current prices, historical data, and trends

Dividends

Dividend yields, payout ratios, and historical records

Financial Ratios

Metrics such as P/E ratio, P/B ratio, and others

Earnings Calls

Transcripts and summaries of earnings reports

Analyst Price Targets

Projected stock prices from various analysts

Financial Analysis

Analyze and summarize companies financials

Company Filings

Access to financial statements and other regulatory filings

System integration

Integration with existing CRM and portfolio management systems

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Charlie AI Copilot

Can you provide me the latest insights on Ernest Vanhouten and Dawn Jones and their investment preferences and goals?

Charlie

Ernest Vanhouten:

- **Recent Activity**: Purchased $38,496 in John Hancock Disciplined Value Fund (JVLTX) and started investing in Columbia Dividend Opportunity Fund (CDOZX).
- **Stopped Transactions**: Discontinued several John Hancock and Columbia funds.
- **Interest**: Invesco Optimum Yield ETF.
- **Contact Status**: Not contacted in 307 days.
- **Year-to-Date Purchases**: $38,496, down from $165,865 last year.
- **Goals**: Growth-focused (55.54%), moderate risk, prefers stable, low-volatility investments.

Dawn Jones:

- **Campaign Participation**: "Hedging Against Inflation Webinar."
- **Recent Activity**: Purchased $10,004 in Columbia Disciplined Small Core Fund (SMCEX), started investing in ARK Next Generation Internet ETF (ARKW) and Global X AI & Technology ETF (AIQ).
- **Stopped Transactions**: Discontinued Columbia Select Small Cap Value Fund (CSSZX) and Columbia Large Cap Index Fund (NINDX).
- **Interest**: Generative AI funds.
- **Contact Status**: Not contacted in 120 days.
- **Year-to-Date Purchases**: $10,973, down from $340,187 last year.
- **Goals**: Balanced growth (52.54%) and capital appreciation (47.46%), high-risk tolerance, focused on AI and advanced tech.

Summary:

- **Ernest**: Balanced, stable investment approach.
- **Dawn**: Aggressive growth, particularly in AI and tech.

Both clients have shifted strategies but haven't been contacted recently, with significant drops in year-to-date purchases.

Ask me anything...

Send

Clients

Ernest Vanhouten

Client Since: 2015

Email: e.anhouten@fakemail.com

Phone: +1 (555) 123-4567

Date of Birth: April 12, 1975

Age: 48

Occupation: Senior Financial Analyst at Brimsbury Regional Bank

Net Income: $265,000 annually

Marital Status: Married

Number of Children: 2

Ernest prefers stable, dividend-paying investments with moderate risk. His portfolio is growth-oriented but has recently shifted towards more conservative assets. Despite reduced activity and lower purchases this year, Ernest has not been contacted in over 300 days, indicating an opportunity for re-engagement.

See full profile

Dawn Jones

Client Since: 2018

Email: dawn.jones@fakemail.com

Phone: +1 (555) 987-6543

Date of Birth: January 5, 1985

Age: 38

Occupation: Chief Technology Officer (CTO) at K-Health

Net Income: $380,000 annually

Marital Status: Single

Number of Children: None

Dawn focuses on aggressive growth in AI and tech sectors, with a balanced approach between growth and capital appreciation. Despite her proactive investment style, her year-to-date purchases are down, and she hasn't been contacted in 120 days, presenting a chance to reconnect with tailored strategies.

See full profile

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Charlie AI Copilot

Charlie, could you build an efficient portfolio for Dawn Jones based on her preferences and goals and with a time horizon of 5-10 years?

Charlie

A refined portfolio has been created for Dawn Jones, tailored to her high-risk tolerance and interest in Generative AI and advanced technologies. This portfolio, "Dawn's Tailored AI, Tech, and Inflation-Hedge Portfolio (RGAIAT3)," is designed to complement her existing investments while incorporating inflation-hedging strategies.

Key Features:

- **High-Risk Profile**: Focused on AI and advanced tech through ETFs and individual stocks.
- **Diversification**: Includes tech-focused ETFs like ROBO, ARKX, IPAY, QQQ, BOTZ (10.9% each), tech giants like AMZN, AAPL, MSFT, GOOGL, IBM (5.5% each), and AI companies like CRM, ORCL, INTC, ADBE (3-5% each).
- **Alignment with Goals**: Balances growth (52.54%) and capital appreciation (47.46%) over a 5-10 year horizon.

Comparison with Existing Investments:

- The portfolio broadens Dawn's exposure to AI and tech, complementing her existing investments like ARKW, AIQ, and SMCEX with similar ETFs.

Account Performance:

- Dawn's account has a positive return of $78.72 (24.50%) since November 2023. This new portfolio builds on that success by targeting high-growth sectors.

Inflation Hedge Consideration:

- While not explicitly focused on inflation-hedging, the emphasis on technology and innovation could provide a natural hedge through growth. Dawn may consider adding specific inflation-hedging assets if desired after the "Hedging Against Inflation" webinar.

Dawn's Tailored AI, Tech, and Inflation-Hedge Portfolio Active

+17.20% YEARLY AVG.

view portfolio details

Ask me anything... Send

Attachments

- dawnjones_portfolio.csv
- dawnjones_updadet_portfolio.csv
- dawnjones_refined_portfolio.csv

Portfolios in this chat

Dawn's Tailored AI, Tech, and Inflation-Hedge Portfolio

+17.20% YEARLY AVG.

QQQ 11% · ARKX 11% · BOTZ 11% · IPAY 11% · CAT 11% · OTHER 45%

1M 3M 6M 1Y ALL

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Charlie AI Copilot

Please calculate the portfolio Sharpe ratio, Sortino ratio and the volatility

Charlie

Here are the calculated metrics for **Dawn's Tailored AI, Tech, and Inflation-Hedge Portfolio**:

1. **Volatility**: 0.168617 (16.86%)
2. **Sharpe Ratio**: 0.586348
3. **Sortino Ratio**: 0.517733

To interpret these results:

1. **Volatility**: The annualized standard deviation of the portfolio's returns is 16.86%, which indicates the level of risk or fluctuation in the portfolio's value over time.
2. **Sharpe Ratio**: At 0.586348, this metric suggests that the portfolio's return per unit of risk is positive but relatively low. A higher Sharpe ratio would indicate better risk-adjusted performance.
3. **Sortino Ratio**: The value of 0.517733 focuses on downside risk and suggests that the portfolio's return relative to its negative volatility is also positive but moderate.

Additionally, a chart showing the portfolio's value over time has been created. This visual representation can provide insights into the portfolio's performance trends.

Ask me anything...

Send

Attachments

- dawnjones_portfolio.csv
- dawn_jones_portfolio_value.csv

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Charlie AI Copilot

Can you compare the portfolio with ARK Next Generation Internet ETF (ARKW) and Global X Artificial Intelligence & Technology ETF (AIQ)?

Charlie

Based on the analysis of the portfolio compared to ARK Next Generation Internet ETF (ARKW) and Global X Artificial Intelligence & Technology ETF (AIQ), here are the key findings:

1. **Holdings Overlap**:
   - Minimal overlap with ARKW (1 symbol, 5.50% weight); significant overlap with AIQ (9 symbols, 43.30% weight).
2. **Top Holdings**:
   - Dawn's portfolio's top holdings are equally weighted ETFs (e.g., QQQ, BOTZ). ARKW focuses on Bitcoin ETF and Tesla, while AIQ is led by Intel and Adobe.
3. **Fund Characteristics**:
   - Dawn's portfolio: 15 AI/tech-focused holdings. ARKW: 42 holdings, 0.87% expense ratio. AIQ: 91 holdings, 0.68% expense ratio.
4. **Investment Focus**:
   - Portfolio is concentrated on AI/tech ETFs. ARKW targets next-gen internet companies. AIQ focuses on AI and big data.
5. **Risk and Strategy**:
   - The portfolio is high-risk with a growth focus. Both ARKW and AIQ are non-diversified and carry higher risk.

Dawn's portfolio has a unique composition, with a strong AI/tech focus and more overlap with AIQ. It provides broad exposure to AI and advanced technologies while maintaining a concentrated, growth-oriented strategy

Top Holdings Comparison top_holdings_comparison.csv

Portfolio	ARKW	AIQ
QQQ	ARKB	INTC
BOTZ	TSLA	ADBE
ARKX	ROKU	NOW
ROBO	COIN	IBM
IPAY	SQ	AMZN
IBM	RBLX	FB
AAPL	HOOD	NFLX
GOOGL	U	CRM
MSFT	PATH	GOOGL
AMZN	FB	MSFT

Ask me anything... Send

Attachments

- top_holdings_comparison.csv
- top_holdings_comparison.csv
- dawn_jones_refined_portfolio.csv
- overlap_portfolio_aiq.csv
- summary_statistics.png

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Charlie AI Copilot

How is the current market activity affecting this portfolio?

Charlie

Based on the market data and economic indicators for August 9, 2024, here's how the current market situation is impacting the portfolio:

- **Market Performance**: Major indices (SPY, QQQ, DIA) show slight gains, indicating a stable market, while futures show minor declines, suggesting pre-market caution.
- **Economic Indicators**: Canada's unemployment rate is steady at 6.4%, and Germany's upcoming inflation data may influence global sentiment.
- **Federal Reserve Outlook**: Expected 25 bps rate cut in September could benefit growth stocks, particularly in tech.
- **Macroeconomic Conditions**: Strong Q2 GDP growth (2.8%) and steady Core PCE inflation (2.6%) show economic resilience despite mixed labor market signals.
- **Sector Impact**: Service sector expansion (ISM PMI at 51.4) may boost service-oriented companies, while weak Manufacturing PMI (46.8) could hurt industrial stocks.
- **Portfolio Implications**: The AI and tech focus aligns well with current conditions, but the high-risk profile may lead to short-term volatility. With no major earnings today, performance will likely follow broader market trends.

The current environment is mixed but generally favorable for Dawn's AI and tech-focused portfolio. Potential rate cuts and strong growth could support high-growth stocks, but inflation and sector challenges need monitoring.

Top Market News

top_market_news.csv

Title	Published at
Asia stocks advance tracking global peers higher; investors assess China inflation data	Fri Aug 09 2024 03:57:41 GMT-0400 (Eastern Daylight Time)
Canada's July unemployment rate unchanged at 6.4%	Fri Aug 09 2024 08:31:25 GMT-0400 (Eastern Daylight Time)
China's July consumer prices rise more than expected, producer prices remains deflationary	Fri Aug 09 2024 00:40:44 GMT-0400 (Eastern Daylight Time)
European markets gain at the end of a turbulent week	Fri Aug 09 2024 04:09:33 GMT-0400 (Eastern Daylight Time)
Germany's inflation edges higher to 2.3% in July	Fri Aug 09 2024 02:02:23 GMT-0400 (Eastern Daylight Time)

Ask me anything...

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Attachments

- global_market_news.csv
- earnings_announcements.csv
- dawn_jones_refined_portfolio.csv
- economic_calendar.csv
- market_quotes.png

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Charlie AI Copilot

Can you please draft an email proposal to send to Dawn Jones with the proposed portfolio?

Charlie

Subject: Tailored AI and Tech Investment Portfolio for Your Review

Dear Dawn,

I hope you’re well. Following your participation in the "Hedging Against Inflation Webinar," I’ve prepared a tailored investment portfolio that aligns with your goals. This portfolio focuses on Generative AI, advanced technologies, and innovative tech startups, balancing growth and capital appreciation.

Portfolio Overview:

- Time Horizon: 5-10 years
- Risk Profile: High-risk tolerance
- Focus: Significant exposure to AI-driven funds and tech ETFs
- Diversification: Mix of ETFs and individual stocks across various tech sectors

Notable Allocations:

- Tech-focused ETFs: ROBO, ARKX, IPAY, QQQ, BOTZ (10.9% each)
- Tech Giants: AMZN, AAPL, MSFT, GOOGL, IBM (5.5% each)
- AI-related Companies: CRM, ORCL, INTC, ADBE (3-5% each)

Performance Metrics:

- Volatility: 16.86%
- Sharpe Ratio: 0.59
- Sortino Ratio: 0.52

These metrics suggest positive risk-adjusted returns, though further optimization could enhance the risk-return profile.

Next Steps:

- **Transition Investments**: Gradually align your current investments with this new allocation.
- **Regular Review**: We’ll regularly review and rebalance to maintain target allocations.
- **Monitoring**: I’ll keep an eye on the performance of your existing investments (ARKW, AIQ, SMCEX) against this new portfolio.

While this portfolio doesn’t explicitly include inflation-hedging assets, its focus on technology could provide a natural hedge through growth. If you’d like, we can explore adding specific inflation-hedging assets based on your preferences after the webinar.

I’ve attached a detailed CSV file and a chart showing the portfolio’s value over time. Please review and let me know if you have any questions or would like to make any adjustments.

Thank you for your trust. I’m here to help you achieve your investment goals.

Best regards,
Kate Stone
Financial Advisor

Ask me anything...

Send

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- dawn_jones_portfolio_value.json

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Dawn’s Tailored AI, Tech, and Inflation-Hedge Portfolio

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Meet the AI Agents: the engines behind Charlie

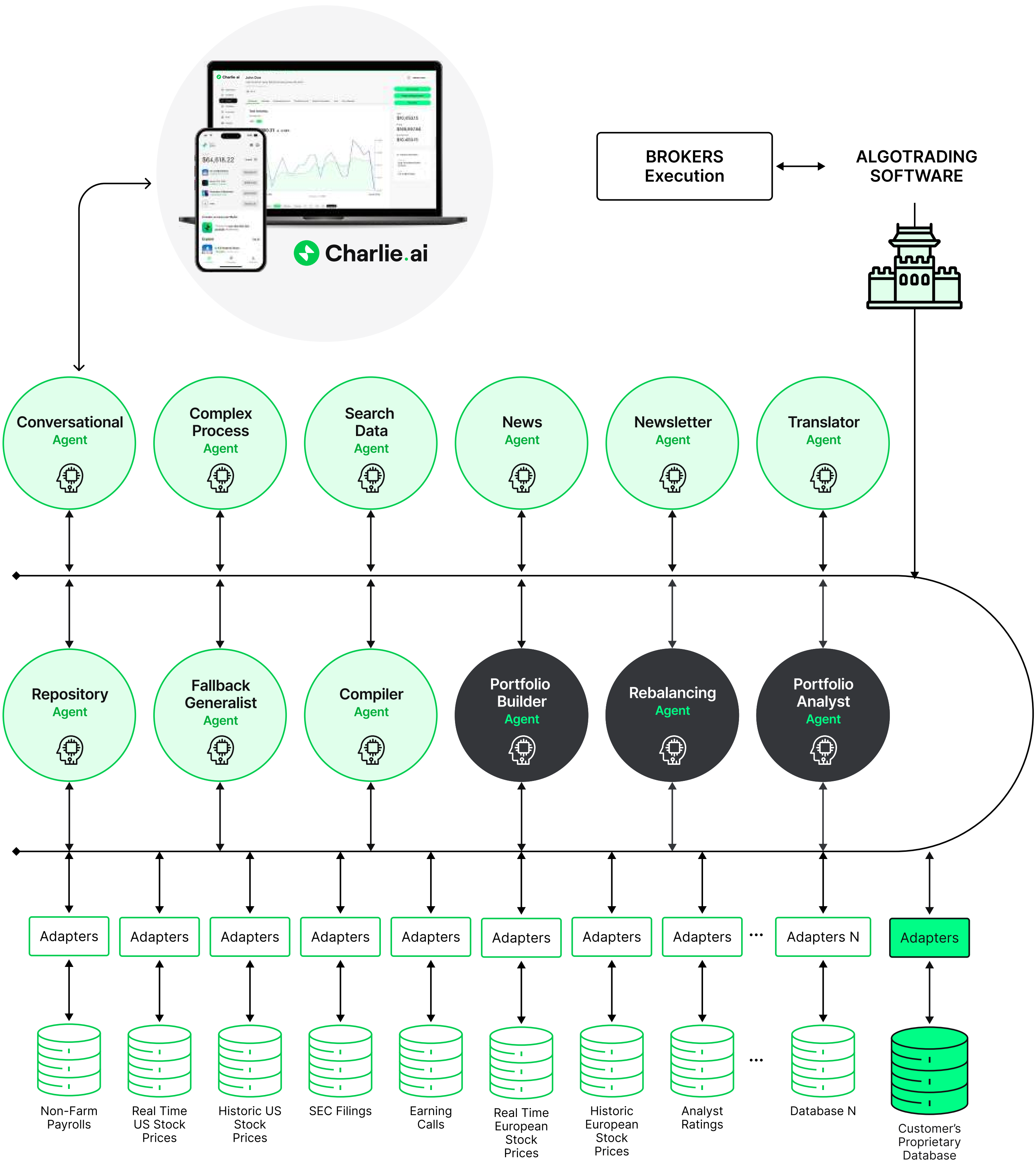
StreetbeatPRO Agents

Compiler Agent	Technology compliance	Execution and evaluation of software written by other AI agents within the Streetbeat ecosystem • Run code from other AI agents • Analyze performance metrics • Provide feedback on efficiency, accuracy, and best practices • Ensure integration with Streetbeat's datasets and CRM • Maintain quality standards for AI-driven portfolio tool
Complex process Agent	Automation & efficiency	Client requests broken into tasks and distributing them across Streetbeat's specialized agent network • Assign tasks to specialized AI agents based on capabilities and workload • Manage task dependencies, priorities, and execution order • Optimize resource allocation for efficient processing • Integrate all task components to ensure desired outcomes
Search data Agent	Information & research	Comprehensive market info (stocks, dividends, earnings) via simple conversation • Stock Performance: Prices, historical data, trends • Dividends and Financial Ratios: Yields, payout ratios, P/E, P/B • Market Updates: News, earnings calls, analyst price targets • Company Information: Earnings calendar, financial statements, regulatory filings
News Agent	Analysis automation	Real-time market news with aggregation, summaries, sentiment scores, and impact assessments • Collect and summarize market news from reputable sources. • Evaluate sentiment of news articles and assign a sentiment score. • Analyze potential market impact of news.
Newsletter Agent	Automation & efficiency	Multilingual support and customizable email templates to suit different preferences and requirements
Translator Agent	Communication efficiency	High-quality translations across languages and themes, for context-appropriate communication
Repository Agent	Information & research	Accessing, indexing, and answering questions based on specific files provided, (e.g. PDFs, Word documents)
Fallback generalist Agent	Information & research	Versatile agent with guardrails to handle general queries beyond specialized agents' scope

Your custom-built Agents

Portfolio Builder Agent	**Investing automation**	Custom equity and ETF portfolios creation and management, tailored to individual user requirements, powered by your company's proprietary logic and selected by your experts • Intelligent portfolio design • Interactive portfolio editing • Advanced equity matching • Comprehensive backtesting • Sophisticated risk assessment • Dynamic weight optimization
Rebalancing Agent	**Investing automation**	Optimal portfolio allocations maintenance, using company's proprietary rebalancing logic • Automated rebalancing • Customizable rebalancing frequency • Intelligent order execution • Tax-aware rebalancing • Drift analysis
Portfolio Analyst Agent	**Automation & efficiency**	In-depth, customized analysis, focused on fixed income portfolios, using company's proprietary analytical frameworks to provide actionable insights • Comprehensive bond portfolio analysis • Custom metric calculation • Scenario analysis • Peer comparison • Risk decomposition The specific output format and content will be determined in close collaboration with your company to ensure alignment with their analytical requirements and client reporting needs.

How the AI agents run



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Streetbeat: Your AI partner

Streetbeat is a fintech innovator specializing in AI-driven financial solutions dedicated to revolutionizing personal finance management through cutting-edge technology.

We partner with banks, trading platforms, and wealth managers to deliver advanced AI-powered financial tools, aiming to transform the landscape of personal and institutional finance.

We empower financial players to be at the forefront of the AI revolution

17M of funding to date from Top Fintech VCs

Accelerated by StartX the Stanford alumni accelerator

About the founders

Damian Scavo
CEO

Damian Scavo is an experienced entrepreneur with **22 years** in technology and finance across the U.S. and Europe, holding over 15 patents.

As CEO of Streetbeat, Scavo is dedicated to **empowering** retail and professional investors with AI technology, underscoring his commitment to innovation and leadership in the financial sector.

Maciej Donajski
CTO

Maciej brings his experience in setting the overall tech stack and **leading** the development of new technological enhancements.

Maciej sets the overarching **technology strategy** for Streetbeat, aligning it with the company's business goals to ensure that technological resources are utilized effectively for maximum impact.

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