

Your new AI Financial
Copilot is here



www.streetbeatPRO.com

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Agenda

> **Warren: AI Financial Copilot**

Warren capabilities

AI Agents in action

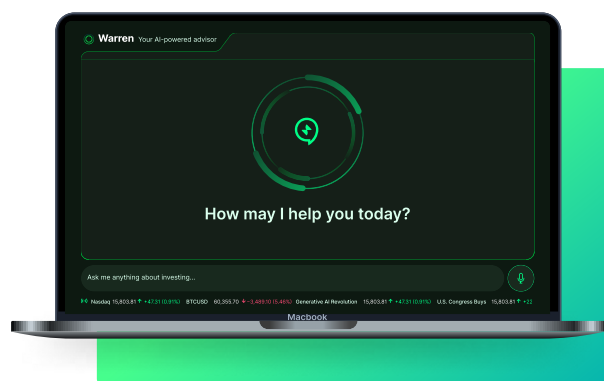
About Streetbeat



Meet Warren, your new AI Financial Copilot

In an era where technology continuously reshapes the financial landscape, "Warren", is your state-of-the-art AI Financial Copilot designed specifically for retail investors.

Warren harnesses the power of artificial intelligence to empower individuals to **invest smarter, more efficiently, and with greater confidence.**



Warren is more than a conversational AI

It's a transformative experience that enhances how people interact with their investments, leading to increased retention and heightened customer satisfaction. More than an assistant, Warren is a partner in navigating the complexities of the financial markets.

Integrating Warren into your offerings means entering a new era of customer engagement. Warren drives higher trading volumes, improves portfolio analysis, and elevates customer satisfaction, positioning your company as a leader in financial innovation. Leveraging over 170 real-time and historical datasets, Warren provides unparalleled insights and a seamless investment experience.



Talk to Warren AI Financial Copilot

Ask questions about the market and steer your new investing journey with ease.

Imagine a future where every investor has a financial copilot like Warren, guiding their journey and optimizing their investment strategies. This future is within reach, and by adopting Warren, you position your firm at the forefront of this technological revolution.

Transform **your services** with Warren

1 Premium revenue stream

- Charge between **\$5 and \$20 per user** for premium service
- Achieve **adoption rates** ranging from **7% to 85%**
- Offer **free trials** for 10 queries or 1 month to boost initial engagement

2 Fast and cost efficient approach

- Save millions of dollars by accessing **174 datasets** with one subscription
- **Reduce development risks** and save millions of dollars in AI developments by leveraging award-winning technology
- **Reduce go-to-market by years** - providing the latest technology intermediately to your user base in weeks

3 Customer engagement and retention

- **Attract early adopters and tech-savvy** clients with innovative AI technology
- **Reduce churn by up to 50%** through enhanced engagement and satisfaction
- **Expand market** reach to younger, digital-first demographics

4 Customer satisfaction and loyalty

- Provide **24/7 instant responses** to client financial question
- Offer **personalized market insights** to each client
- Enhance client experience with **user-friendly AI interactions**

5 Competitive advantage

- **Differentiate your offerings** in a crowded financial services market
- **Easily adapt to market changes** with flexible AI systems
- **Attract top customers** interested in working with cutting-edge AI technology

6 Brand enhancement

- Position your institution as a **leader in financial innovation**
- **Improve brand perception** among tech-savvy consumers
- Increase positive word-of-mouth referrals by **4-12% through superior client experiences**

Sources: internal data

Empower **your clients** with Warren

1 Unparalleled market intelligence

- Provide clients with instant access to **174 datasets**, including popular Reddit Stocks and Congress trades
- Offer **8 years of historical data** for comprehensive trend analysis
- Enable **creation of custom ETF indexing or stock lists** based on specific criteria

2 Professional-grade financial tools

- Give clients access to analysis **tools typically reserved for top financial institutions**
- Empower **informed decision-making** with comprehensive market data
- **Increase client trading activity** through improved market understanding and financial education

3 Personalized financial insights

- Deliver **tailored market analysis** based on individual investment interests
- Offer **deep understanding of portfolio performance and market trends**
- **Simplify complex financial data** with easy-to-grasp explanations

4 Enhanced financial literacy

- **Facilitate learning** through interactive, AI-powered education
- Help clients understand market dynamics and economic factors
- Support continuous **financial knowledge growth** at the client's pace

5 24/7 multilingual support

- Provide **instant answers** to financial questions around the clock
- Offer **support in multiple languages**, catering to a diverse client base
- Enable **quick analysis** of potential investment opportunities

6

Advanced portfolio & risk management

- Showcase portfolio performance with **cutting-edge data visualization**
- Allow **tracking of investments** across multiple assets and markets
- Equip clients with advanced **risk assessment tools** and issue timely warnings about potential market volatility

7

Customizable experience

- **Tailor the AI Copilot's capabilities** to match your institution's offerings
- **Integrate with existing systems** for a seamless client experience
- **Offer scalable solutions** to meet diverse client needs

Exclusive additional offerings

Robo Advisor integration: amplify wealth management

For institutions aiming to provide comprehensive wealth management, our state-of-the-art Robo Advisor **seamlessly integrates with the AI Financial Copilot**, delivering an unparalleled end-to-end solution for client investment needs.

Key Benefits:

Boost trading volume
by 2 to 10 times

Substantially improve users' profit
and loss (P&L) performance

Enhance client engagement with
holistic financial services

Public data shows that **the average retail trader underperformed the S&P 500 by 50%** and the Nasdaq 100 by 62% between 2021 and 2023. The Robinhood data is public and you can access it by yourself [at this link](#).

Our Robo-Advisor aims to bridge this performance gap, **offering your clients a disciplined and sophisticated approach to invest, by creating personalized thematic portfolios that automatically apply modern portfolio theory, efficient frontier and diversifications, in a matter of seconds.**

College Tuition Program: invest in your clients' future

Differentiate your services and foster long-term loyalty with our exclusive College Tuition Program.

Program Highlights:

- ✔ Up to 25% tuition discounts at over 450 private colleges and universities in the United States
- ✔ Available to all extended family members of the customer for life
- ✔ Covers 1 year out of four of college tuition
- ✔ Unique offering in the financial services industry

Enhance your value proposition:

Reduce churn by an additional
50% for engaged users

Strengthen multi-generational
client relationships

Demonstrate commitment to
clients' lifelong financial journey

For a complete list of participating universities, visit [this link](#).

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AI Agents in action

About Streetbeat



What can Warren do?

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

Market News

Relevant updates and news articles impacting market conditions

Earnings Calls

Transcripts and summaries of earnings reports

Analyst Price Targets

Projected stock prices from various analysts

Earnings Calendar

Scheduled dates for company earnings reports

Financial Analysis

Analyze and summarize companies financials

Company Filings

Access to financial statements and other regulatory filings

Financial Comparisons

Compare performances of companies & investments

Sentiment Analysis

Utilizes NLP techniques to evaluate the sentiment of news articles

Impact Assessment

Analyzes the potential market impact of the news

Risk Analysis

Risk assessment for optimal investment decisions

Graphic Visualization

Plot graphic visualization of financial analysis

Your Expert

Provides information about your company and services

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Provide a summary of all the macro economics, top movers, news, important events that happened in the market today

Warren

Key Financial and Economic Highlights:

1. Macroeconomic Developments:

- Q2 2024 GDP growth was 2.8%, above expectations.
- Core PCE Inflation for June 2024 was 2.6%, in line with forecasts.
- Manufacturing PMI declined to 48.0, while Services PMI expanded to 55.2.
- Initial jobless claims fell to 232K, indicating a stable labor market.
- Markets are pricing in over 105 bps in rate cuts by year-end.

2. Earnings Calls:

- HEI-A beat estimates with EPS of 0.97 vs. 0.93 expected. Other companies like USA, PFN, PHYS, and TCOM also reported.

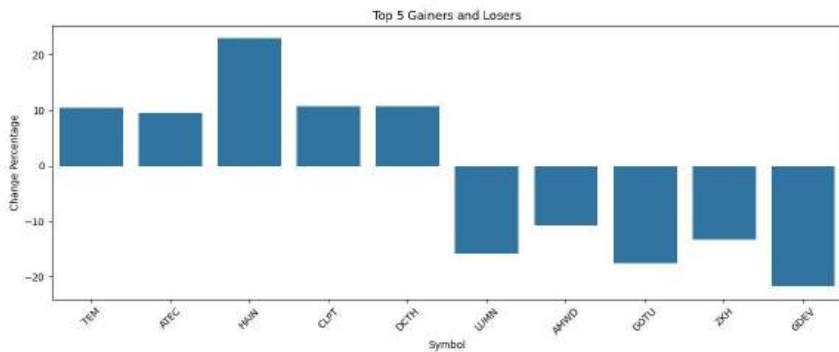
3. Market-Impacting News:

- Mixed results in Asia-Pacific markets due to Middle East tensions.
- European markets gained modestly on rate cut expectations.
- Germany's GDP contracted by 0.1% in Q2.
- Oil prices rose amid Middle East conflict fears.
- U.S. consumer confidence improved, and durable goods orders surged.
- Markets are cautious ahead of major earnings reports from NVIDIA and Salesforce.

4. Top Market Movers:

- **Gainers:** Tempus AI (+10.48%), Alphatec Holdings (+9.52%), Hain Celestial Group (+22.99%)
- **Losers:** Lumen Technologies (-15.86%), American Woodmark (-10.69%), Gaotu Techedu (-17.52%)
- **Most Active by Volume:** NVIDIA (\$24.97B), Tesla (\$9.78B), SPDR S&P 500 ETF (\$9.52B)

This summary provides a concise overview of today's financial landscape, focusing on key economic indicators, market trends, and notable company performances.



Attachments

economic_calendar.csv

top_gainers.csv

most_active.csv

us_news.csv

top_movers.png

global_news.csv

top_losers.csv

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What is the market opinion on Microsoft right now?

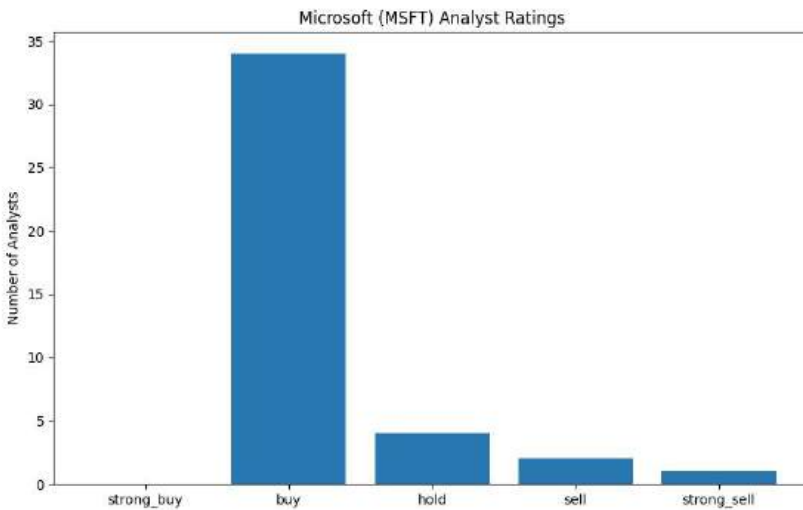
Warren

The current market opinion on **Microsoft (MSFT)** is predominantly positive. Based on the analyst consensus data, Microsoft has a "Buy" rating. The breakdown of analyst recommendations shows 34 "Buy" ratings, 4 "Hold" ratings, 2 "Sell" ratings, and 1 "Strong Sell" rating. No "Strong Buy" ratings were recorded.

Recent analyst actions further support this positive sentiment. The last five analyst updates, as shown in the saved file, all maintain positive ratings such as "Overweight," "Outperform," and "Buy." These ratings come from reputable firms including KeyBanc, Wolfe Research, BMO Capital, Goldman Sachs, and Oppenheimer.

A visual representation of the analyst ratings distribution can be found in the saved PNG file, which clearly illustrates the strong preference for "Buy" ratings among analysts covering Microsoft.

This data suggests that the overall market sentiment towards Microsoft is **bullish**, with analysts generally recommending purchasing or holding onto the stock.



Attachments

- msft_news.csv
- msft_performance.csv
- msft_quote.csv
- msft_ratings.csv

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Can you show me every time that Apple has moved more than 5% in the last 2 years?

Attachments

apple_significant_moves.csv

Warren

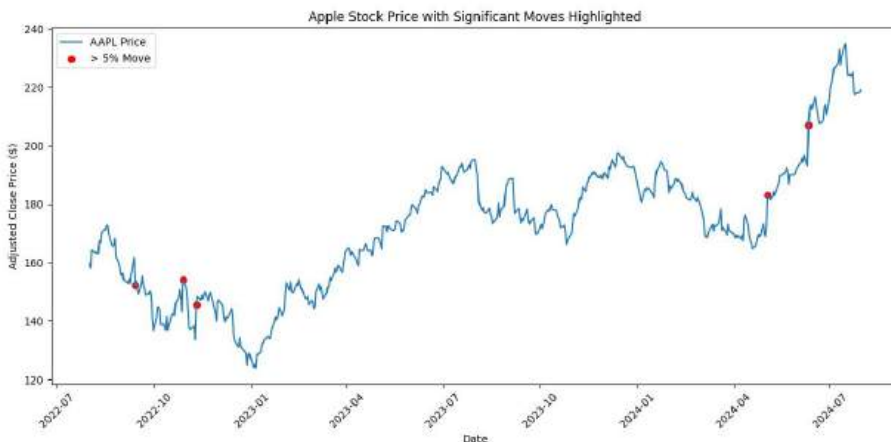
Based on the analysis of **Apple's stock** price data over the last two years (from July 30, 2022, to July 30, 2024), there were 5 instances where the stock price moved more than 5% in a single day. These significant moves are:

- **September 13, 2022:** -5.87% decrease
- **October 28, 2022:** 7.55% increase
- **November 10, 2022:** 8.90% increase
- **May 3, 2024:** 5.98% increase
- **June 11, 2024:** 7.26% increase

A detailed CSV file containing all these significant moves has been saved as 'apple_significant_moves.csv'. Additionally, a visual representation of Apple's stock price over the two-year period, with these significant moves highlighted, has been saved as 'apple_stock_price_with_moves.png'.

The analysis shows that while Apple's stock experienced some volatility, days with more than 5% movement were relatively rare, occurring only 5 times in a two-year period. Interestingly, 4 out of 5 of these significant moves were positive, indicating more instances of large gains than large losses. The largest single-day movement was an 8.90% increase on November 10, 2022.

These findings suggest that while **Apple's stock can experience significant daily fluctuations**, such large movements are infrequent. Investors should be aware of the potential for such volatility but also note that historically, the large movements have tended to be more positive than negative for this particular time period.



Ask me anything...

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Can you analyze the historical performance and volatility of my current portfolios?

Warren

Portfolio Analysis:

- **Crypto Exposure:** YTD Return: 27.26%, Current Equity: \$107.88, Total Return: -1.92%, Volatility: 35.15%, Long-term Return: 265.20%
- **Generative AI Revolution:** YTD Return: 18.73%, Current Equity: \$1,196.11, Total Return: 19.75%, Volatility: 26.71%, Long-term Return: 86.69%
- **U.S. Congress Buys:** YTD Return: 15.68%, Current Equity: \$319.41, Total Return: 4.72%, Volatility: 23.42%, Long-term Return: 168.39%

Your portfolios have all outperformed the S&P 500 in YTD returns. The Crypto portfolio led with a 27.26% YTD return but also had the highest volatility (35.15%). The Generative AI and U.S. Congress Buys portfolios also posted strong returns with notable volatility, balancing high returns with higher risks.

Short-term performance favored the U.S. Congress Buys portfolio, while the others saw slight declines. Over the long term, all portfolios outperformed the market, especially the Crypto portfolio with a 265.20% one-year return.

Overall, **your account achieved a 35.43% total return**, exceeding the S&P 500's YTD return. While your account's volatility is higher than the S&P 500, it benefits from diversification across portfolios. However, the high volatility suggests potential short-term fluctuations.

A chart of your portfolios' cumulative returns and a detailed CSV file with metrics are available for further analysis.

Portfolio Performances Over Time



Attachments

- portfolio_data.csv
- portfolio_performance_over_ti...

Portfolios

- U.S. Congress Buys**
+36.25 YEARLY AVG.
- Generative AI Revolution**
+19.20 YEARLY AVG.
- Crypto exposure**
+22.52 YEARLY AVG.

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Could you compare my portfolio of stocks with the S&P 500 and the Nasdaq 100? Please also calculate the Sharpe ratio and the volatility.

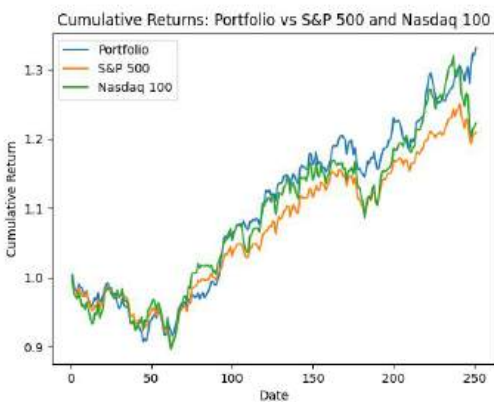
Warren

Portfolio Performance Summary:

- **Cumulative Returns:** A chart comparing your portfolio's cumulative returns to the S&P 500 and Nasdaq 100 helps you track performance over time relative to these indices.
- **Key Metrics:**
 - **Annualized Return:**
 - Your Portfolio: 29.59%
 - S&P 500: 19.74%
 - Nasdaq 100: 21.49%
 - **Annualized Volatility:**
 - Your Portfolio: 13.16%
 - S&P 500: 11.53%
 - Nasdaq 100: 16.17%
 - **Sharpe Ratio:**
 - Your Portfolio: 2.10
 - S&P 500: 1.54
 - Nasdaq 100: 1.21

Your portfolio has outperformed both the S&P 500 and Nasdaq 100 in terms of annualized return, with a 29.59% return. Volatility (13.16%) places your portfolio between the S&P 500 and Nasdaq 100, suggesting moderate risk. The Sharpe ratio of 2.10 indicates strong risk-adjusted returns, outperforming both indices.

Overall, your portfolio has shown strong performance over the past year. However, past performance doesn't guarantee future results, so it's important to regularly review and rebalance your portfolio.



Attachments

performance_summary.csv

Portfolios

- U.S. Congress Buys +36.25 YEARLY AVG.
- Generative AI Revolution +19.20 YEARLY AVG.
- Top Gov Contract Recipients +19.45 YEARLY AVG.
- U.S. House Buys +28.93 YEARLY AVG.
- Passive Income +11.54 YEARLY AVG.
- Bond Ladder +0.40 YEARLY AVG.
- Value and Technology +26.77% YEARLY AVG.
- Tech and Sustainability +7.12% YEARLY AVG.
- AI Hardware Investments +22.94% YEARLY AVG.
- Crypto exposure +22.52 YEARLY AVG.

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How is the current market activity affecting this portfolio?

Warren

Market Performance:

- Major indices (SPY, QQQ, DIA) are slightly positive, indicating a stable market environment, while futures show minor declines, suggesting pre-market caution.

Economic Indicators:

- Canada's unemployment rate held steady at 6.4%, impacting North American economic stability.
- Germany's upcoming inflation data could influence European and global markets.

Federal Reserve Outlook:

- Expectations of a 25 bps rate cut in September could benefit tech and growth stocks in your portfolio.

Macroeconomic Conditions:

- Strong Q2 GDP growth at 2.8%, with Core PCE inflation at 2.6%, suggests economic resilience despite mixed labor market signals.

Sector-Specific Impact:

- The service sector is expanding (ISM Non-Manufacturing PMI at 51.4), benefiting service-oriented companies, while manufacturing remains weak (PMI at 46.8), which may affect industrial stocks.

Portfolio Implications:

- The tech and AI focus of your portfolio aligns well with the current market, as tech sectors could gain from expected rate cuts.
- The high-risk profile may lead to short-term volatility due to mixed economic signals.
- With no major earnings today, portfolio performance will likely follow broader market trends.

The current market presents a mixed but generally favorable environment for your AI and tech-focused portfolio. Potential rate cuts and steady growth could support high-growth stocks, though inflation and sector challenges require monitoring.

Global market news

global_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)

Attachments

- global_market_news.csv
- earnings_announcements.csv
- economic_calendar.csv
- market_quotes.csv

Active Portfolio



AI, Tech, and Inflation-Hedge Portfolio

+18.28% YEARLY AVG.



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



1M 3M 6M 1Y ALL

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Compare the Texas S&P 500 Companies with the "SPDR S&P 500 ETF Trust" performance of the last 5 years.

Warren

Based on the analysis of the performance of **Texas S&P 500** companies compared to the **SPDR S&P 500 ETF Trust (SPY)** over the last 5 years, we can draw the following conclusions:

- 1. Number of Texas-based S&P 500 companies:** There are 47 companies headquartered in Texas that are part of the S&P 500 index.
- 2. Performance comparison:**
 - The average 5-year return for Texas S&P 500 companies: 142.14%
 - The 5-year return for the SPY (representing the broader S&P 500): 97.00%
- 3. Relative performance:** On average, the Texas-based S&P 500 companies outperformed the broader S&P 500 index (as represented by SPY) by a significant margin over the past 5 years. The Texas companies' average return was approximately 45 percentage points higher than the SPY's return.

In summary, the data suggests that, as a group, the Texas-based S&P 500 companies have significantly outperformed the broader S&P 500 index over the past five years. This outperformance could be attributed to various factors such as the specific industries represented by these companies, the economic conditions in Texas, or individual company performances. However, it's important to note that past performance does not guarantee future results, and individual company performances within the Texas group may vary considerably.

Performance Comparison: TXSP5 vs SPY (Last 5 Years)



Attachments

texas_vs_spy_comparison.csv

Portfolios



Texas-based S&P 500 Companies Portfolio

+26.50% YEARLY AVG.



- TSLA 20%
- TXN 5%
- XOM 14%
- CAT 4%
- ORCL 10%
- OTHER 46%



1M 3M 6M 1Y ALL



SPDR S&P 500 ETF Trust (SPY)

+10.26% YEARLY AVG.



1M 3M 6M 1Y ALL

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How do interest rates impact the bond market?

 **Warren**

Interest rates have a significant impact on the bond market. Here are the key ways in which they influence bonds:

1. Bond Prices and Yields:

- **Inverse Relationship:** When interest rates rise, bond prices typically fall, and when interest rates fall, bond prices usually rise. This inverse relationship occurs because existing bonds with lower interest rates become less attractive compared to new bonds issued at higher rates.
- **Yield Adjustment:** As bond prices decrease, the yield (the return on investment) for those bonds increases, making them more competitive with new issues.

2. New Bond Issuance:

- **Coupon Rates:** When interest rates are high, new bonds are issued with higher coupon rates to attract investors. Conversely, when interest rates are low, new bonds have lower coupon rates.

3. Investment Decisions:

- **Attractiveness of Bonds:** Higher interest rates can make bonds more attractive to investors seeking fixed income, as they offer higher returns. Conversely, lower interest rates might push investors to seek higher returns in other asset classes, such as stocks or real estate.



4. Economic Indicators:

- **Inflation and Growth:** Interest rates are often adjusted by central banks to control inflation and stimulate or cool down economic growth. These adjustments can signal economic conditions, influencing investor sentiment and bond market dynamics.

5. Duration and Sensitivity:

- **Duration:** Bonds with longer maturities are more sensitive to interest rate changes. A rise in interest rates will have a more significant impact on the price of long-term bonds compared to short-term bonds.


Understanding these dynamics can help investors make informed decisions about their bond investments in different interest rate environments. If you need more specific data or analysis on current interest rates and their impact on the bond market, I can fetch the latest macroeconomic conditions for you.

 **Attachments**  interest_rate_changes.png interest_rate_events.csv

Ask me anything...

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What is the Sharpe ratio, and how is it used to assess investment performance?

Warren

The Sharpe ratio is a measure used to evaluate the risk-adjusted return of an investment portfolio. It is calculated by subtracting the risk-free rate (such as the return on Treasury bills) from the portfolio's return and then dividing the result by the portfolio's standard deviation (a measure of its volatility).

The formula for the Sharpe ratio is:

$$[\text{Sharpe Ratio}] = \frac{R_p - R_f}{\sigma_p}$$

Where:

- (R_p) is the return of the portfolio.
- (R_f) is the risk-free rate.
- (σ_p) is the standard deviation of the portfolio's excess return.

How It Is used:

- 1. Comparison of Portfolios:** The Sharpe ratio allows investors to compare the risk-adjusted performance of different portfolios or investments. A higher Sharpe ratio indicates better risk-adjusted returns.
- 2. Performance Benchmarking:** It helps in assessing whether a portfolio's returns are due to smart investment decisions or excessive risk. A higher ratio suggests that the returns are more likely due to good investment choices rather than high risk.
- 3. Risk Management:** Investors use the Sharpe ratio to understand the risk-return tradeoff. It helps in identifying whether the additional risk taken by a portfolio is justified by the additional returns.

Interpretation:

- **Sharpe Ratio > 1:** Indicates good risk-adjusted performance.
- **Sharpe Ratio < 1:** Indicates that the returns are not adequately compensating for the risk taken.
- **Sharpe Ratio = 0:** Indicates that the portfolio's return is equal to the risk-free rate.
- **Negative Sharpe Ratio:** Indicates that the portfolio has underperformed the risk-free rate.

The Sharpe ratio is a valuable tool for investors to make informed decisions about their investment strategies by considering both the returns and the risks involved.

Ask me anything...

Send





Can you explain the principles of behavioral finance and how cognitive biases can affect my investment decisions? How can I mitigate these biases?

Warren

Behavioral Finance: Understanding Investor Behavior

Behavioral finance combines psychology and economics to explore how individuals make financial decisions, challenging the traditional view that investors are always rational and markets are always efficient. It acknowledges that cognitive biases and emotions can lead to irrational decisions and market anomalies.

Key Principles:

- **Heuristics:** Mental shortcuts that can lead to biases.
- **Overconfidence:** Overestimating knowledge and predictions, leading to excessive risk-taking.
- **Loss Aversion:** Preferring to avoid losses rather than acquiring gains, leading to poor investment decisions.
- **Anchoring:** Relying too heavily on initial information, like a stock's purchase price, when making decisions.
- **Herd Behavior:** Following the crowd, which can cause bubbles or crashes.
- **Mental Accounting:** Separating money into different "accounts" based on subjective criteria, leading to irrational decisions.

Cognitive Biases Affecting Investments:

- **Confirmation Bias:** Seeking information that confirms existing beliefs.
- **Recency Bias:** Overemphasizing recent events in decision-making.
- **Hindsight Bias:** Believing events were predictable after they occur, leading to overconfidence.
- **Availability Bias:** Overestimating the importance of readily available information.
- **Status Quo Bias:** Preferring the current state of affairs, leading to resistance to change.

Mitigating Cognitive Biases:

- **Education and Awareness:** Understand common biases to mitigate their effects.
- **Diversification:** Spread investments to reduce the impact of biased decisions.
- **Setting Rules:** Establish clear investment criteria to avoid emotional decisions.
- **Regular Review:** Periodically rebalance your portfolio to stay aligned with long-term goals.
- **Seeking Advice:** A financial advisor can offer objective perspectives.
- **Mindfulness and Reflection:** Reflect on past decisions to identify and correct biased thinking.

By recognizing these biases and implementing strategies to counteract them, you can make more rational and informed investment decisions.

Ask me anything...

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About Streetbeat



Meet the AI Agents: the engines behind Warren

StreetbeatPRO Agents

AI Copilot Agent	Information & research	<p>The primary interface for retail investors, integrating various specialized agents to provide comprehensive financial information and insights</p> <ul style="list-style-type: none"> • Conversational interface for financial queries • Integration of data from multiple specialized agents • User-friendly explanations of complex financial concepts • Personalized responses based on user preferences and knowledge level
Finance search data Agent	Information & research	<p>Comprehensive market info (stocks, dividends, earnings) via simple conversation</p> <ul style="list-style-type: none"> • 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	<p>Real-time market news with aggregation, summaries, sentiment scores, and impact assessments</p> <ul style="list-style-type: none"> • Collect and summarize market news from reputable sources. • Evaluate the sentiment of news articles and assign a sentiment score. • Analyze the potential market impact of the news.
Files conversation Agent	Information & research	<p>Accessing, indexing, and answering questions based on specific files provided (e.g., PDFs, Word documents)</p>
Complex process Agent	Automation & efficiency	<p>Client requests are broken into tasks and distributed across Streetbeat's specialized agent network</p> <ul style="list-style-type: none"> • 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
Fallback generalist Agent	Information & research	<p>Versatile agent with guardrails to handle general queries beyond specialized agents' scope</p>
Translator Agent	Communication efficiency	<p>High-quality translations across languages and themes, for context-appropriate communication</p>

Tailored Agents

Conversational Agent	Information & research	Market information, investment insights, and portfolio updates via natural language queries
Augmented Search Agent	Information & research	Natural language stock searches with specific financial criteria, providing detailed and relevant insights
MultiAction Agent	Automation & efficiency	Managing actions performed across all portfolios per given direction or automatically
Data Scientist Agent	Information & research	Detailed analysis and actionable information to facilitate strategic decision-making
Custom Agent	Automation & efficiency	Specifically built to provide a superior customer experience or automate existing processes

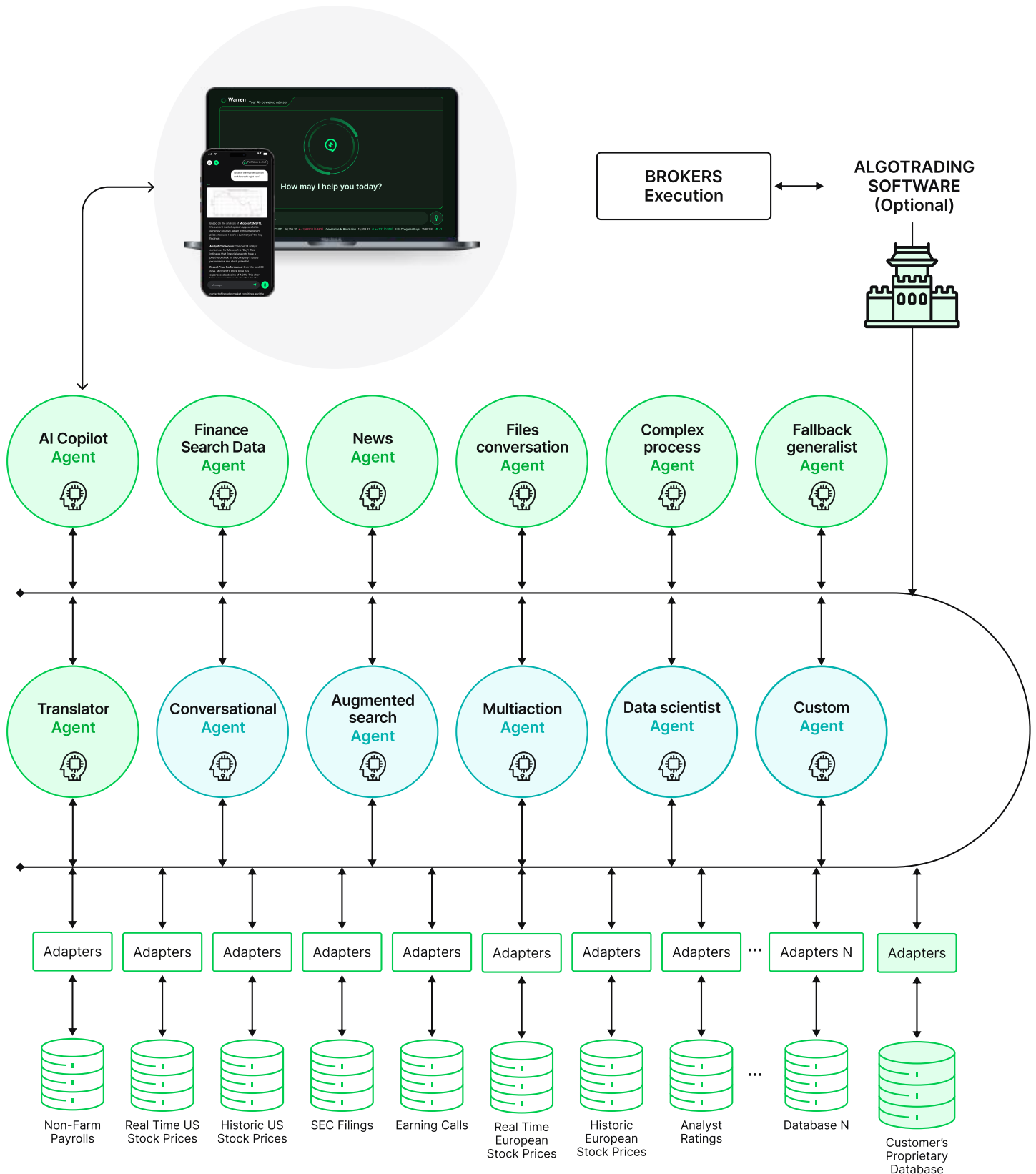
Additional Agents (available on demand)

Portfolio Agent	Investing automation	Customized equity and ETF portfolios deploying user input and historical analysis to assess past performance
Rebalancing Agent	Investing automation	Dynamic portfolio adjustments using modern portfolio theory, customer goals, and market data changes
Special Portfolio Agent	Investing automation	Multi-asset portfolio analysis applying theories, generating multilingual outputs with visuals
Investor Advisor Agent	Investing automation	Personalized plan creation and implementation to pursue detailed financial goals
Risk Manager Agent	Analysis automation	Investment risks & market conditions assessment for optimal portfolio stability and performance
CRM Agent	Automation & efficiency	Multilingual support and customizable email templates to suit different preferences and requirements

We can create Agents for all your goals

StreetbeatPRO is a versatile solution that allows multiple agents to be added based on specific requirements. These agents can be developed by Streetbeat and deployed within the customer's architecture.

How the AI agents run



Agenda

> Warren: AI Financial Copilot

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AI Agents in action

> **About Streetbeat**



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.

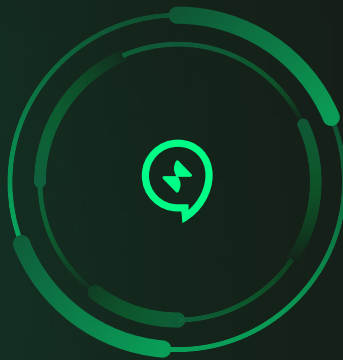
As CEO of Streetbeat, Scavo is dedicated to **empowering** retail and professional investors with AI technology, underscoring his commitment to innovation and leadership in the financial sector.

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.

 Streetbeat



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