

Anthropic AI Hackathon

mams-nerd

Investment Apprentice

Your assistant that helps you understand companies quicker, and form better investment decisions

ANTHROPIC



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Target audience

Investment professionals

- portfolio managers
- analysts



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Issues facing investors today

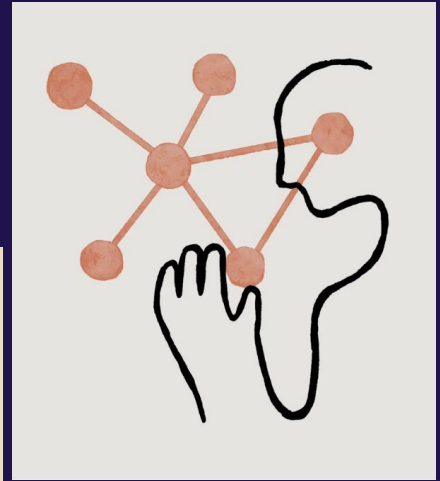
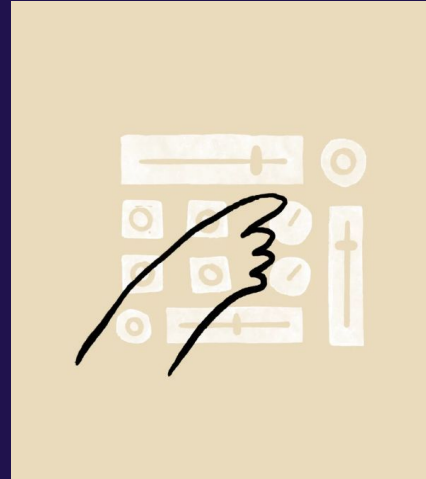
- **Overwhelmed** by amount of information
- **Biased** opinion on a company
- Analyst research reports typically **lag** or are slow to be published
- A lot of companies are **uncovered** by analysts



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Here comes **Claude** AI

- Man and machine works together
- Provide timely, unbiased information
- Ability to provide coverage to unlimited number of companies



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How does **Claude**  help?

- **Summarises** quarterly corporate earnings transcripts
- **Analyses** management speech, questions from analysts
- Highlights **risks / concerns**
- Provides **rating / opinion**
- **Compares** to previous quarter & with peers



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Claude 

Results

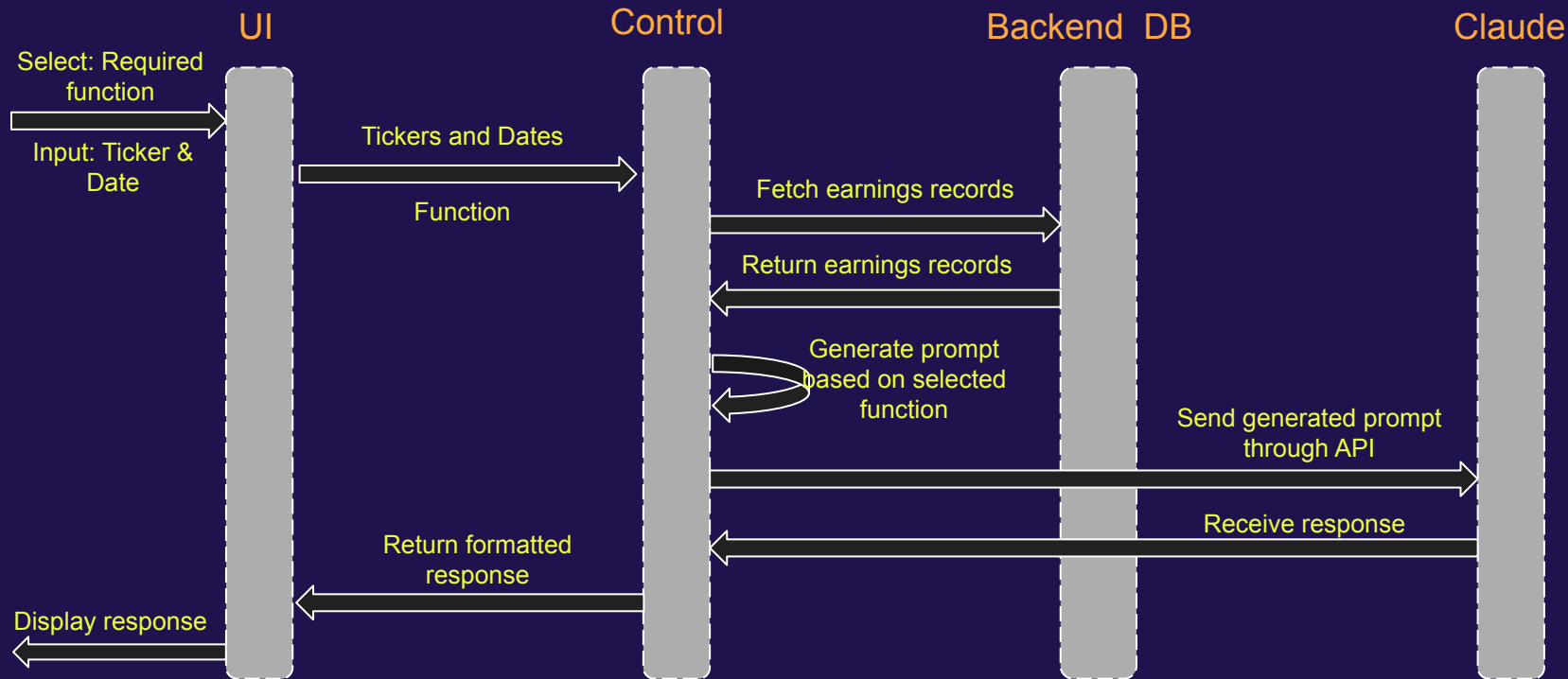
- Claude is **unbiased** - objective in summarising and providing opinion on the companies
- Investment professionals are more informed, able to form judgement more quickly



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High Level Overview of Architecture



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Claude



Challenges faced

- **Hallucination** - Claude tends to make up information to fill in the blanks, or provide incorrect responses at times
- **Slow response** - Generation of response by Claude takes time, especially for large token sizes
- **Lack of standardisation** - Different companies use different terms to refer to the same thing in their transcripts, which leads to messiness at times in the output we get from Claude

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Claude



Areas for Future Development

- **Better Context** - Providing Claude with more contextual knowledge on the company beyond just the quarterly earnings transcript
- **Daily email notification** - The email contains links to access the outputs on the site.