Earning.ly

Team Peppermint

01

Purpose

Why Did We Build Earning.ly?

A **Natural Language** Financial Advisor

Modern day finance and balance sheets are often filled with jargon and other convoluted terms. We made Earning.ly to simplify that and pull data out of:

- 10-Ks
- 10-Qs
- 8Ks

So that everyone can understand finance.

What Makes Us Different?

We integrate directly with the SEC's EDGAR system via API in order to get financial data and filings directly from the companies. This data allows our LLM to fully contextualize based on the company's balance sheet.
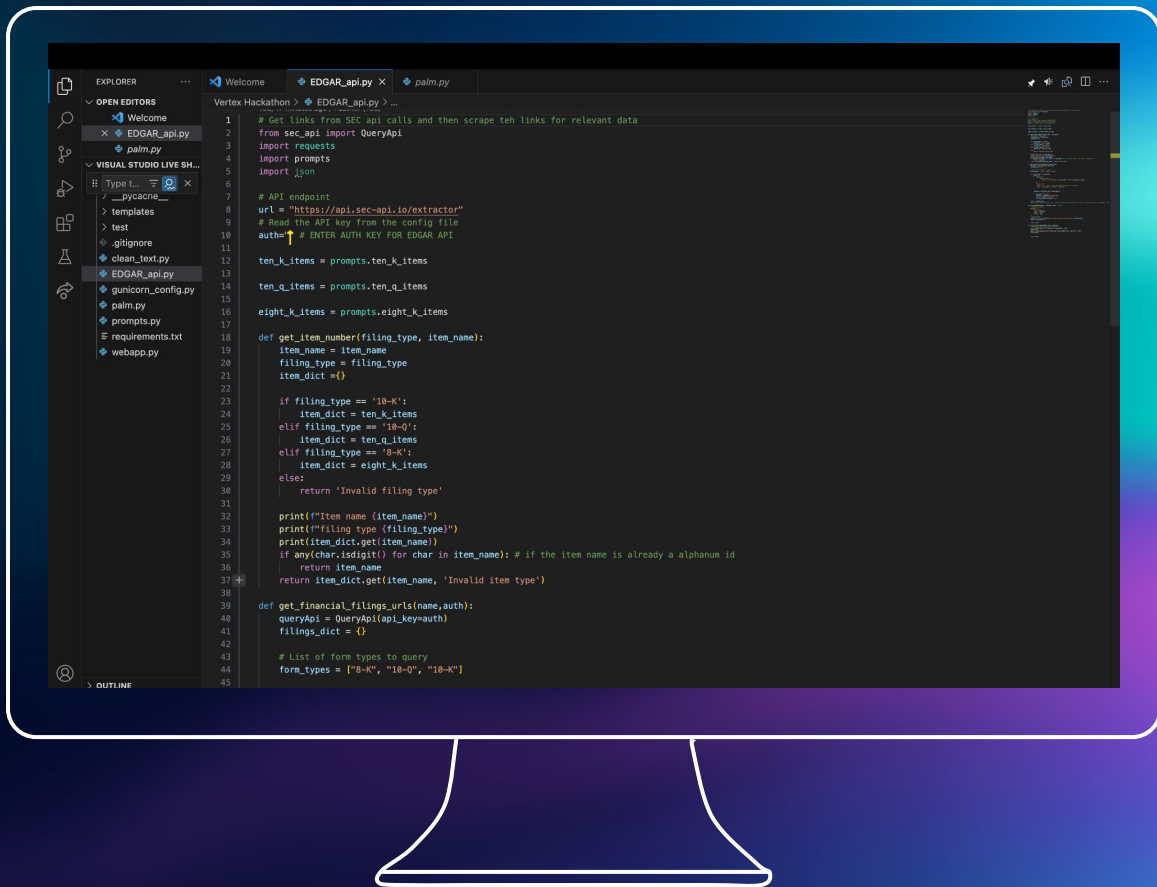
02

Function

How Does Earning.ly Work?

SEC
EDGAR

As previously mentioned, we fetch information from the SEC's EDGAR via API to pull data.

```python
1    from fastapi import FastAPI
2    from fastapi.middleware.cors import CORSMiddleware
3    from google.auth import credentials
4    from google.oauth2 import service_account
5    import google.cloud.aiplatform as aiplatform
6    from vertexai.preview.language_models import ChatModel, InputOutputTextPair
7    import vertexai
8    import json  # add this line
9
10   # Load the service account json file
11   # Update the values in the json file with your own
12   p_service_acct = r"service_account.json"
13   with open(
14       p_service_acct
15   ) as f:  # replace 'serviceAccount.json' with the path to your file if necessary
16       service_account_info = json.load(f)
17
18   my_credentials = service_account.Credentials.from_service_account_info(
19       service_account_info
20   )
21
22   # Initialize Google AI Platform with project details and credentials
23   aiplatform.init(
24       credentials=my_credentials,
25   )
26
27   with open(p_service_acct, encoding="utf-8") as f:
28       project_json = json.load(f)
29       project_id = project_json["project_id"]
30
31
32   # Initialize Vertex AI with project and location
33   vertexai.init(project=project_id, location="us-central1")
34
```

Google's
PaLM2

We use Google's PaLM2 LLM to help parse through data and answer user requests.

Demo

Here's how it works: Users input their financial questions into Earning.ly and receive responses that provide the best possible financial advice.

Earnings.ly

What was Nvidia's EPS last quarter?

The last EPS for Costco was $2.94 on a basic basis and $2.93 on a diluted basis.

What's Tesla's Outlook?

Tesla's outlook is positive. The company is focused on increasing vehicle production, capacity delivery capabilities, improving developing battery technologies, improving FSD capabilities, increasing affordability, efficiency vehicles, and bringing new products market expanding global infrastructure.

What are Tesla's assets, liabilities, and market cap?

As of March 31, 2023, Tesla's total assets were $86.833 billion and total liabilities were $37.598 billion. This means that the company has a net asset value of $49.235 billion. Tesla's stock price was $799.20 on March 31, 2023, which gives the company a market capitalization of $942.79 billion.

Ask a question

Submit

Thanks!

A lot of effort went into this project, and if you have any feedback, please feel free to reach out at any of the following below:

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