

Assetly.ai

YOUR FINANCIAL ADVISING MADE SIMPLE



AGENDA

- Team
- Problem
- Solution
- Market Size
- Business Model
- Next Steps/Backlogs
- Tech Involved
- Working Demo

MEET THE TEAM



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AI Product Manager

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Ex- Software Engineer

PROBLEM

Customer Segmentation:

- Private Equity
- Venture Capital
- Asset/Wealth Management
 - Financial Advisors
 - Independent traders and investors

Problem for Financial Advisors:

- No easy tool for the advisors to offer customized portfolio offering to their clients.
- Use complex excel sheets and age old CRMs.
- Cannot manage many clients at once due to cumbersome research

SOLUTION

LLM powered portfolio management application that does the heavy lifting by reading multiple annual/quarterly reports at once and customizing the portfolios by evaluating risk and return.



SIZE OF MARKET



20B USD

1.5B USD

228M

TAM

Including Private Equity and
Venture Capital

SAM

Just the independent advisors
and asset management tools

SOM

Possible revenue in the short
term

REVENUE STREAM

Subscription

1. 10,000 USD per
Advisor/yr - Full
features

2. 200 USD per
Advisor/mo - LLM
powered search

Enterprise Clients

1. 7000 USD per
user/yr

2. Custom plan for
custom solutions -
5000+ users

NEXT STEPS / BACKLOGS

- Enhance the document search for upto 20 documents
- Work on ingestion to get data from Excel (Vectara Ingest)
- Client dashboard with visual charts
- Portfolio evaluation tools - Risk calculator using different stock performance metrics
- Conversational Support for Clients and Advisors (Vectara)
- Integrations with Anyscale and LlamaIndex
- Long term - Build Private Equity and VC equity document analysis

TECH INVOLVED

- Vectara Indexing Service
- Vectara Query Service
- Streamlit for UI
- Vectara Corpus

DEMO

<https://github.com/chandrasahasM/Vectara-Hackathon.git>

Thank you!
