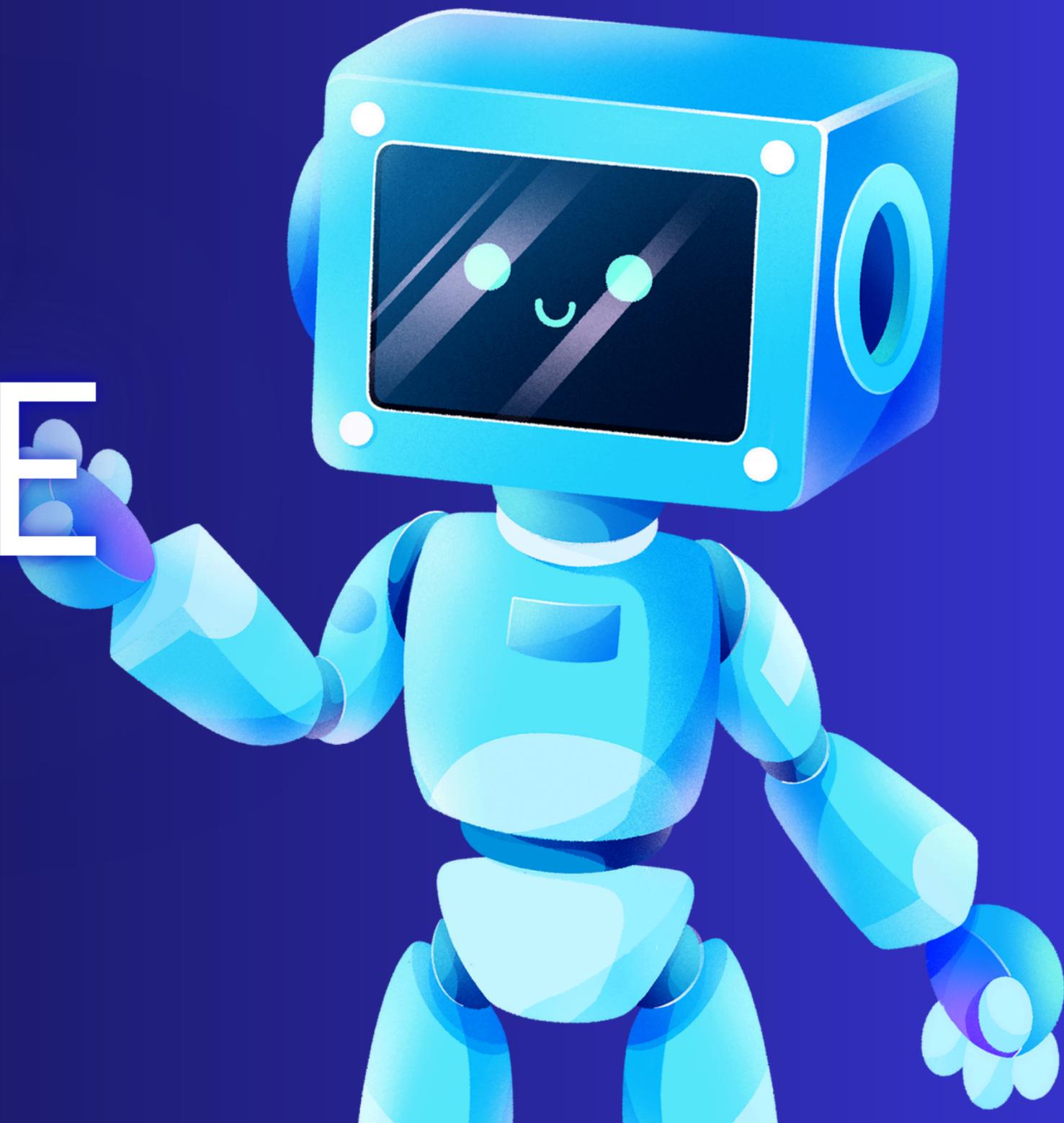




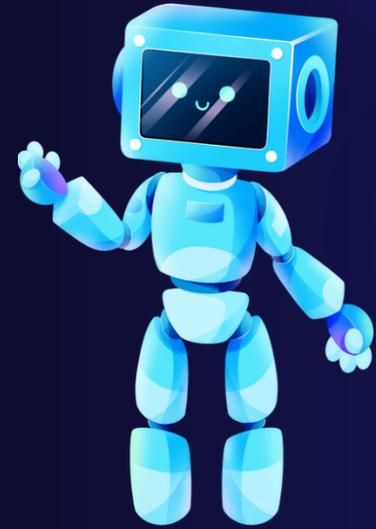
ARTIFICIAL INTELLIGENCE

# INVESTMATE

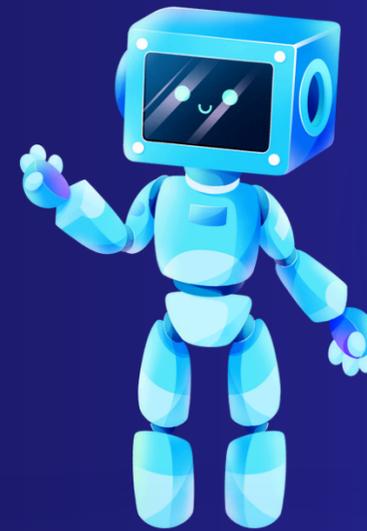
By Neural Net Ninjas



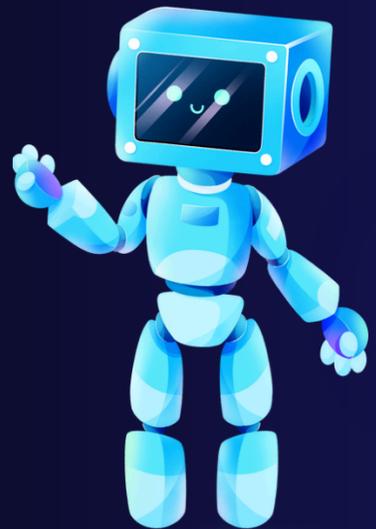
# TEAM - NEURAL NET NINJAS



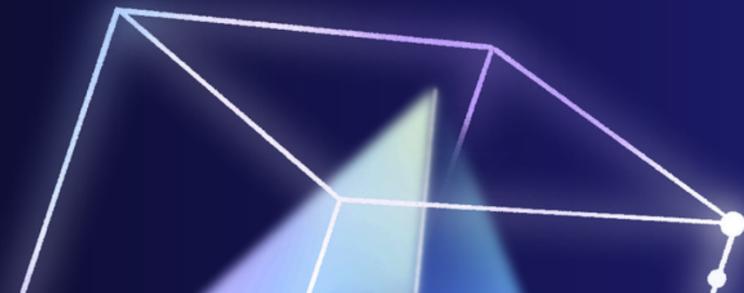
ARVIND KANDULA

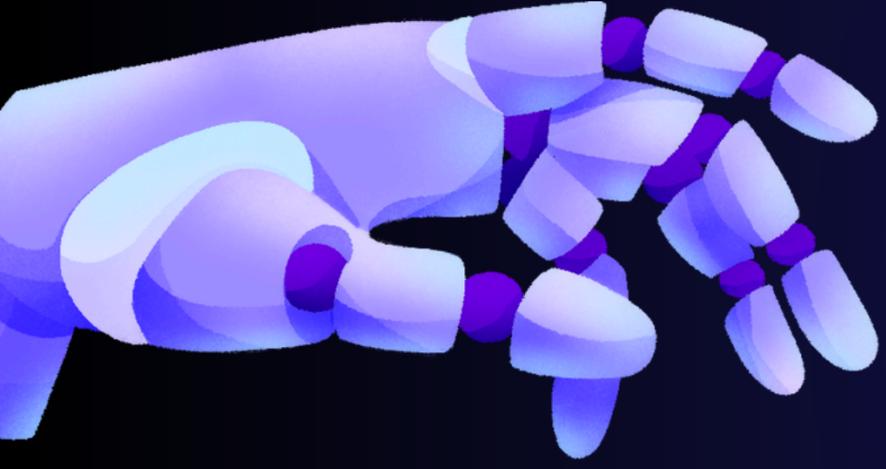


RAJ BIRRU



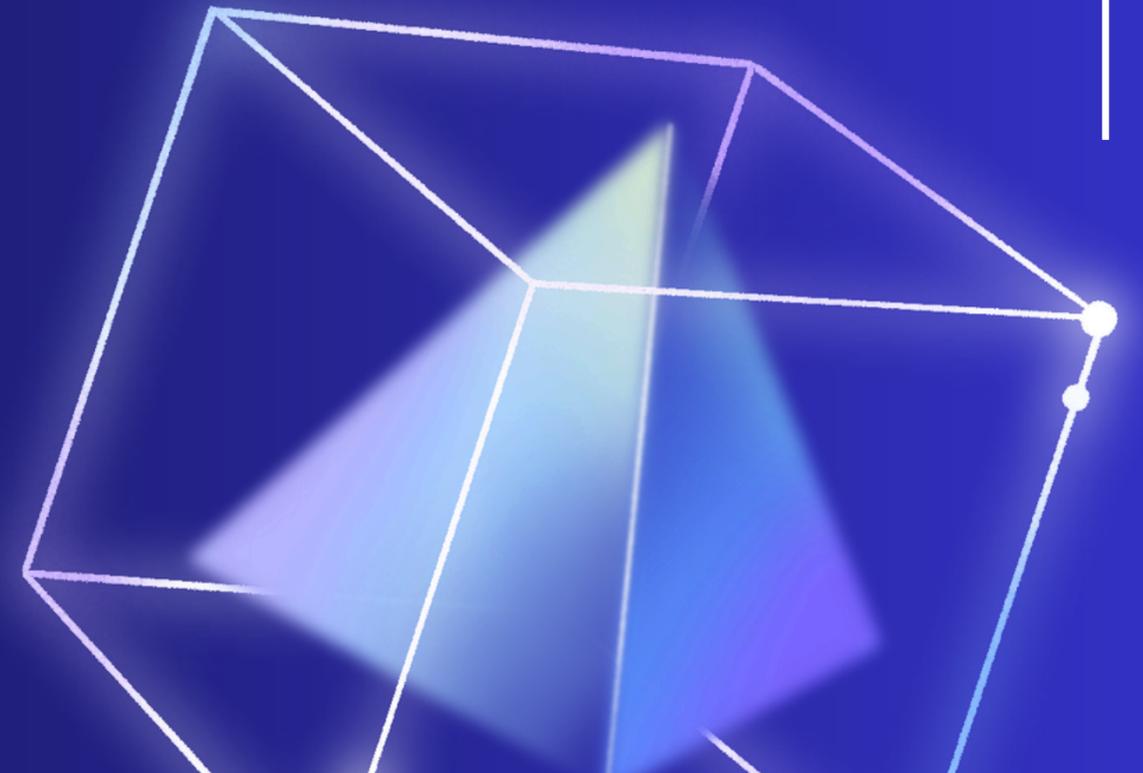
SUDARKODI MUTHIAH





# TABLE OF CONTENTS

|                      |    |
|----------------------|----|
| • Introduction       | 01 |
| • Problem statement  | 02 |
| • Solution           | 04 |
| • Architecture       | 06 |
| • Business plan      | 07 |
| • Revenue stream     | 08 |
| • Market opportunity | 09 |
| • Market projection  | 10 |
| • Demo               | 11 |
| • Conclusion         | 12 |



# INTRODUCTION

Today, we will explore the common challenges individual investors face and how InvestMate provides tailored solutions through advanced AI technology.

---

## INVESTMATE

InvestMate is a chatbot designed to navigate mutual fund investments using a Retrieval-Augmented Generation (RAG) system and offers tailored solutions specifically designed to assist individual investors in selecting the most suitable mutual funds for their investment portfolios.



# PROBLEM STATEMENT



## Problem 1

Investors struggle with the sheer volume of available data on mutual funds, making it hard to find relevant information. The complexity of selecting the right investment based on multiple fund characteristics poses a significant challenge.

## Problem 2

Many investors lack crucial financial literacy, particularly in understanding investment strategies. Achieving a well-diversified portfolio is often a complex and misunderstood process. Furthermore, generic financial advice does not meet individual investors' unique financial goals and risk preferences.

# CHALLENGES FACED BY INDIVIDUAL INVESTORS



## **Information Overload**

- Investors struggle with the sheer volume of available data on mutual funds, making it hard to find relevant information.

## **Complex Decision-Making**

- The complexity of selecting the right investment based on multiple fund characteristics poses a significant challenge.

## **Educational Gap**

- Many investors lack crucial financial literacy, particularly in understanding investment strategies

## **Portfolio Diversification**

- Achieving a well-diversified portfolio is often a complex and misunderstood process

## **Personalization Need**

- Generic financial advice does not meet individual investors' unique financial goals and risk preferences.

SOLUTION  
HOW INVESTMATE  
ADDRESSES THESE  
CHALLENGES



## DATA MANAGEMENT

Utilizes RAG technology to filter and deliver the most relevant fund information effectively.

## SIMPLIFIED DECISIONS

Analyzes user input to recommend funds that align with their specific financial goals.

## EDUCATIONAL SUPPORT

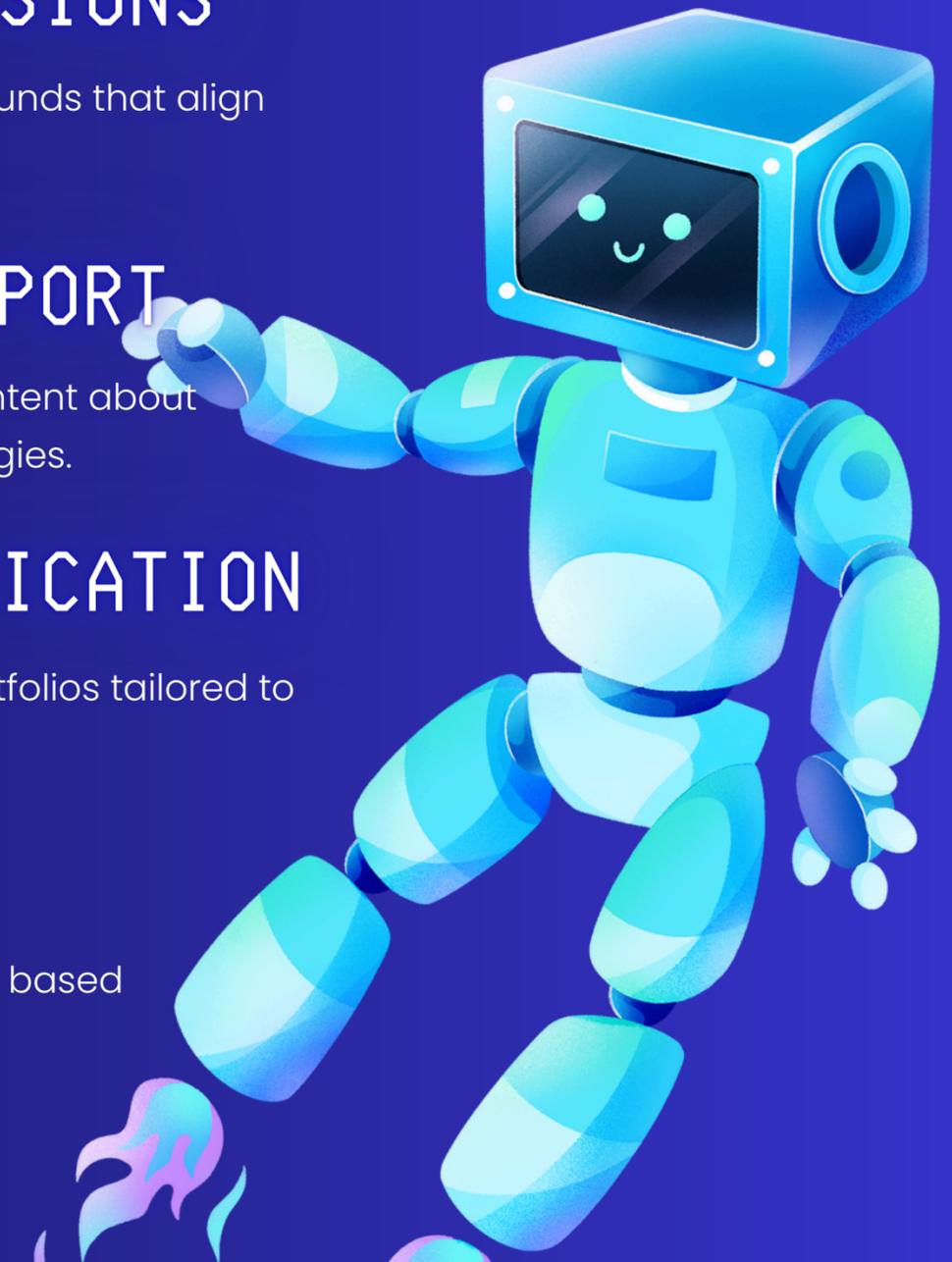
Provides contextual, educational content about mutual funds and investment strategies.

## GUIDED DIVERSIFICATION

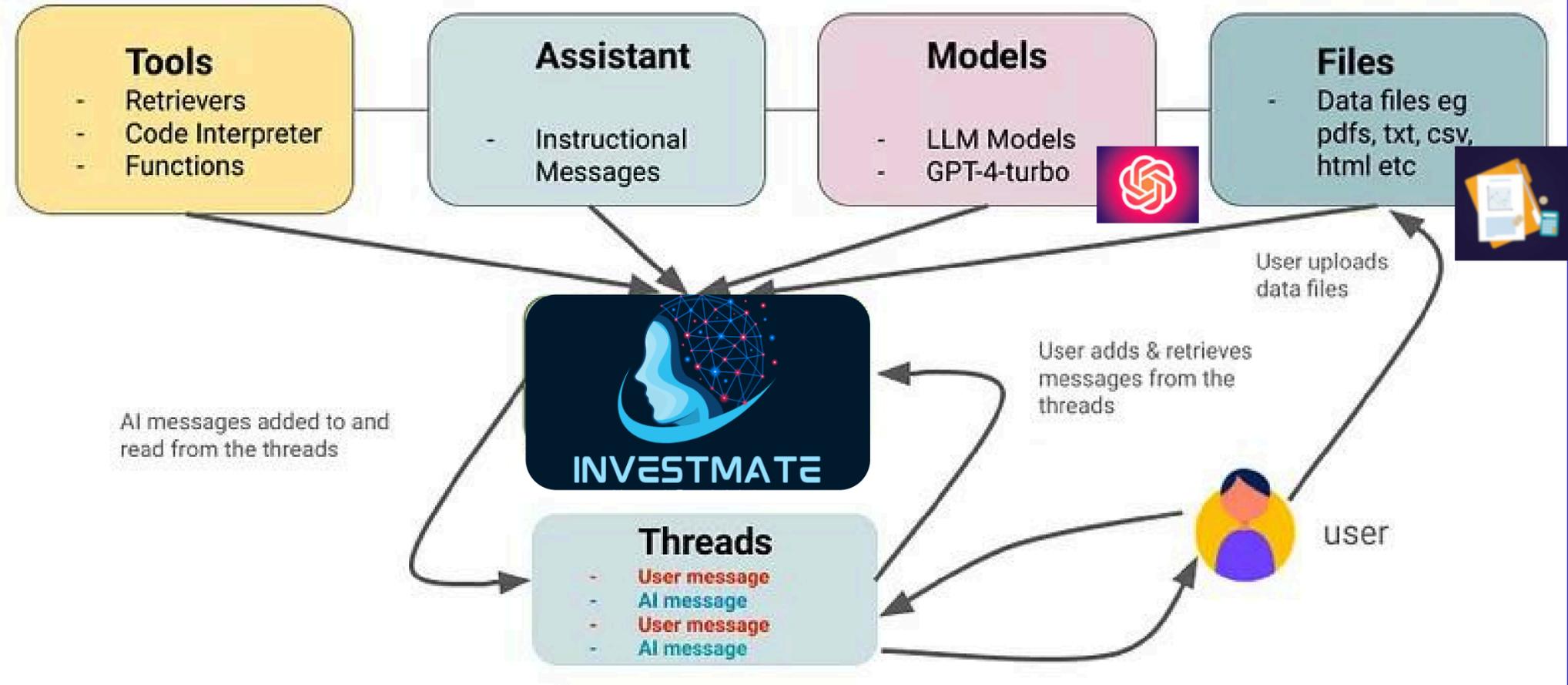
Helps users construct diversified portfolios tailored to manage risk and enhance returns.

## CUSTOMIZED ADVICE

Generates personalized investment strategies based on individual risk profiles and objectives.



# INVESTMATE ARCHITECTURE & DATAFLOW DIAGRAM



Technologies



# BUSINESS PLAN

AI Assistant for Mutual Funds and ETFs: Market Entry and Financial Projections Report  
Product Overview

01

- AI Assistant leverages RAG architecture to transform mutual fund and ETF literature into a searchable vector database, serving various stakeholders within investment advisory firms.

02

- This includes sales teams, training departments, customer services, and product teams. The assistant's capabilities are extendable to intermediaries and brokerages, making it a versatile tool in the financial sector.

# REVENUE STREAM

## Subscription Pricing Model

01

### Individuals:

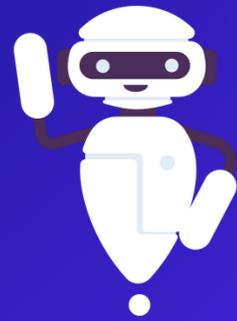
- Basic: \$30/month — Basic fund data and standard queries.
  - Premium: \$60/month — Includes trend analysis and personalized alerts.
- 

02

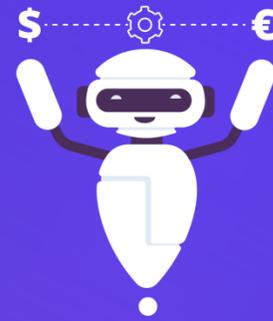
### Firms:

- Basic (up to 10 users): \$200/month — Standard access and support.
- Professional (up to 50 users): \$500/month — Advanced analytics tools and priority support.
- Enterprise: \$1,000+/month — Customizable solutions and unlimited access.

# MARKET OPPORTUNITY



TOTAL  
ADDRESSABLE  
MARKET (TAM)



POTENTIAL  
CUSTOMERS

10,000 investment advisory firms and 50,000 registered financial advisors in the U.S.



ESTIMATED TAM

Initial TAM of \$240,000 annually from firms, assuming a 10% market penetration at the Basic Firm level.

# MARKET PROJECTIONS

## GROWTH PROJECTIONS

- Year 1: 10% market penetration due to new market entry.
- Years 2–5: Projected annual growth of 20% as product adoption increases and market presence solidifies.

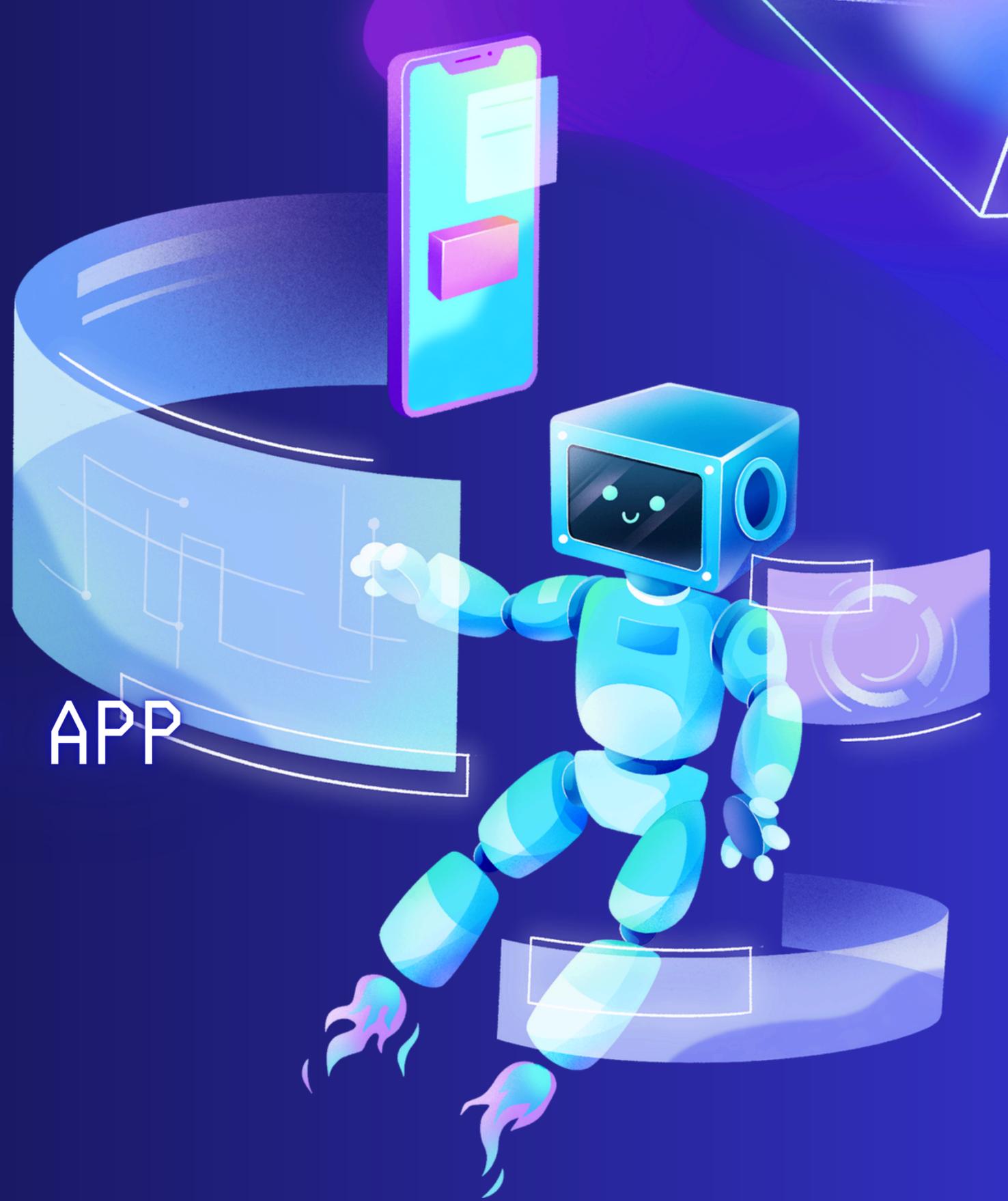
---

## REVENUE PROJECTIONS

- Year 1: \$420,000 (Combination of firm and individual subscriptions)
- Year 2: \$504,000 (20% growth)
- Year 3: \$604,800 (20% growth)
- Year 4: \$725,760 (20% growth)
- Year 5: \$870,912 (20% growth)

DEMO!

CLICK HERE TO ACCESS APP



# InvestMate - Mutual Fund Advisor

Where AI meets the financial industry



Welcome to InvestMate! Would you like to explore our list of mutual funds, or do you have specific investment goals in mind for creating a diversified portfolio? I am a helpful chat assistant. How can I help you?



# CONCLUSION

- The InvestMate presents a strong value proposition for investment advisory firms, bridging the gap between vast data quantities and actionable insights.
- With strategic pricing, targeted marketing, and continuous product development, the AI chatbot InvestMate is poised for successful market penetration and sustained growth.



THANK YOU!

