



Financial Report Analysis Assistant

This PowerPoint presentation explains the objective of the project which is to streamline the analysis of financial reports coupled with an AI-based solution that extracts data and answers questions from financial PDFs. It also describes the features of the project including automated PDF table extraction, interactive Q&A, data visualization, and a user-friendly interface. Additionally, the presentation highlights the SWOT analysis, the use of the project, and future directions for enhancing the AI model and data visualization capabilities.

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Introduction

01

****Platform**:** Streamlit application integrated with OpenAI's GPT model.

02

****Objective**:** Streamline the analysis of financial reports.

03

****Solution**:** Use AI to extract data and answer questions from financial PDFs.



The Issue - Problem Statement

- Manual analysis of financial reports is timeconsuming and error-prone.
- Difficulty in extracting and interpreting financial data from PDFs.
- Lack of an interactive tool for querying financial data in realtime.



Features of the Project - Automated PDF Table Extraction

- Extract tables from PDF reports using pdfplumber.



Interactive Q&A

- Ask questions about financial data and get Alpowered responses.



Data Visualization

- Visualize extracted financial metrics over multiple years.



User-friendly Interface

- Simple and intuitive Streamlit interface for uploading files and interacting with the data.



Project Workflow

- Upload PDF: Users upload a PDF financial report.
- Extract Tables: Tables are extracted and converted into a DataFrame.
- Ask Questions: Users ask questions about the financial data.
- Get Answers: AI provides detailed answers based on the data.
- Visualize Data: Extracted financial data is visualized for better understanding.

SWOT Analysis

- Strengths:
 - Automated data extraction reduces manual effort.
 - - AI-powered insights enhance data interpretation.
 - - Real-time interaction with financial data.
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- Weaknesses:
 - - Dependence on the accuracy of AI model responses.
 - - Limited to the financial data format in PDFs.
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- Opportunities:
 - - Expansion to support other types of financial documents.
 - - Integration with more advanced AI models.
 - - Collaboration with financial institutions for tailored solutions.
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- Threats:
 - - Data privacy and security concerns.
 - - Rapid advancements in competing technologies.

Use of the Project - Financial Analysts

- Quickly analyze financial reports and extract key metrics.





**ARTIFICIAL
INTELLIGENCE**

Use of the Project - Business Managers

- Make informed decisions based on realtime financial insights.

Use of the Project - Investors

- Evaluate company performance through automated data extraction and analysis.





Use of the Project - Educational Purposes

- Teach students how to analyze financial data using modern tools and technologies.

Conclusion

01

Future Directions: Enhance the AI model, support more document formats, and improve data visualization capabilities.

02

Innovation: Combining AI with financial data analysis for better efficiency and accuracy.

03

Impact: Simplifies and accelerates the process of financial data analysis.

Thank you for your time 😊