

## Presentation Overview: AI-Powered Investment Services via TraderX Integration

This banking application provides investment services to its customers that are executed through the TraderX platform. Members can create and manage investment portfolios, trade stocks, and handle transactions directly from their bank accounts, while staying updated with simulated real-time market data.

Key features of the application include:

### **Real-Time Stock Tracking**

- Stock prices are continuously updated, reflecting real-time market conditions.

### **Portfolio Management**

- Users can easily track their investments, manage portfolios, and execute trades efficiently.

### **AI-Powered Investment Advice**

- The "Get AI Advice" feature aggregates the following data for analysis by a large language model (LLM):
  - Current Stock Price
  - Historical Stock Performance (covering 5-, 10-, 15-, and 30-day intervals with details on high, low, open, and close prices)
  - User's Investment in the stock
  - Portfolio Allocation: The percentage of the user's portfolio made up by that stock
  - Company Sentiment Analysis
- Using this data, the AI provides recommendations on whether to Buy, Sell, or Hold the stock. The system then pre-fills a trade form, which the user can review before executing the trade.

### **Seamless Trading**

- Once a trade is approved by the user, the order is sent to the app's servers, then forwarded to the TraderX platform for final processing.

### **Portfolio Updates and Transaction Logging**

- After the trade is executed, the user's portfolio is updated with the new stock value, and the transaction is automatically logged for future reference.

This overview provides a glimpse into how this application leverages AI and real-time data to offer personalized investment advice and simplify the trading process for its users.