intelvest.us

investing with intelligence

User Manual 1.1

Gnosis Learning Inc.



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Introduction

Today, in the Age of AI, “Intelligent Investing” is more about how investors can harness the power of AI to serve their investing needs. Post the AI singularity of 2023, Intelligent Investing or what we call Intelvesting will soon be the norm. The AI enabled and savvy investor will have the ability to browse through enormous reams of 10Qs, 10Ks, Prospectuses and Annual Reports of ETFs and Mutual Funds and with the help of Gen AI, look at dynamically synthesized graphs, and quickly size up large numbers of news articles and analyst videos to make informed intelligent investment decisions.

Intelvest uses Gnosis's "Virtual Overlay" technology to embellish documents and add intelligence to the whole Investing Process and Investing Experience. This patented technology overlays Public Documents like 10-Ks, 10-Qs, additionally ETF Annual Reports and Prospectuses and Mutual Fund related information and makes these hard to read documents much easier. When coupled with graphing and comparative visualization as well as AI integrated news and risk analysis, Intelvest becomes a truly powerful tool for the Investments industry. For both investment advisors and institutional investment professionals, the productivity gains will be enormous.

Its latest SlideCast feature, an enhanced form of "Virtual Overlay" delivers Document Intelligence at scale and makes it far easier for Institutional Investors, Investments Advisors and their clients, Wealth Offices, High Net worth Individuals and easily understand the gist as well as the details of the mountain of information that comes with owning any modern portfolio of assets. Our Slidecast feature delivers a mix of Earnings Calls (with an AI Chatbot) as well as turns 10-Ks and 10-Qs and Analyst Research into easy audio enhanced slide presentations coupled with graphing using the power of AI.

Intelvest helps advisors and clients autogenerate Investment plans that can then be easily understood with the Plancast feature. It can also help deliver portfolio updates to advisor clients or institutional portfolio managers coupled with SlideCasts and Riskcast features.

Who should use this manual?

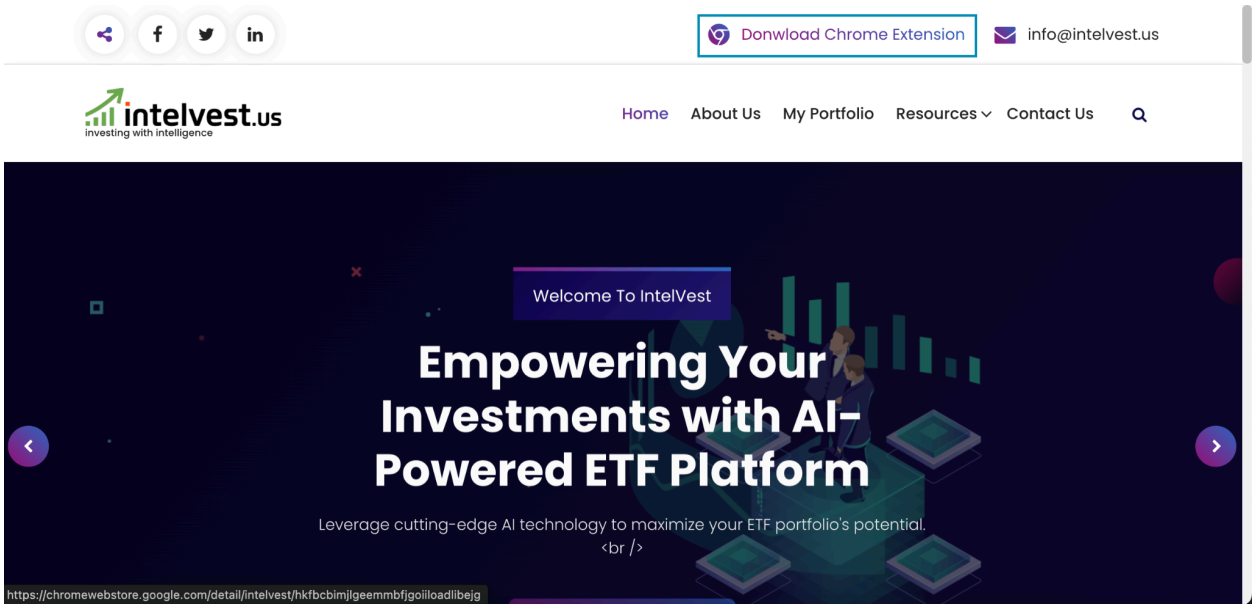
This manual can be used by a professional investor or an amateur, a small investor with a retirement portfolio or a high net worth billionaire. Using this platform one can improve portfolios so that an Intelligent Investor or Analyst who is building an SMA or a Comingled Fund, they can better serve the needs of his employer, fiduciary client and in some cases themselves when they are dealing with their own investments.

Requirements

The minimum requirements for running the Intelvest browser plugin is listed below: Microsoft Windows 7 / Vista / XP SP2 MAC OS X 10.4 or later with Internet Connectivity. Supported web browsers include Google Chrome.

Getting started

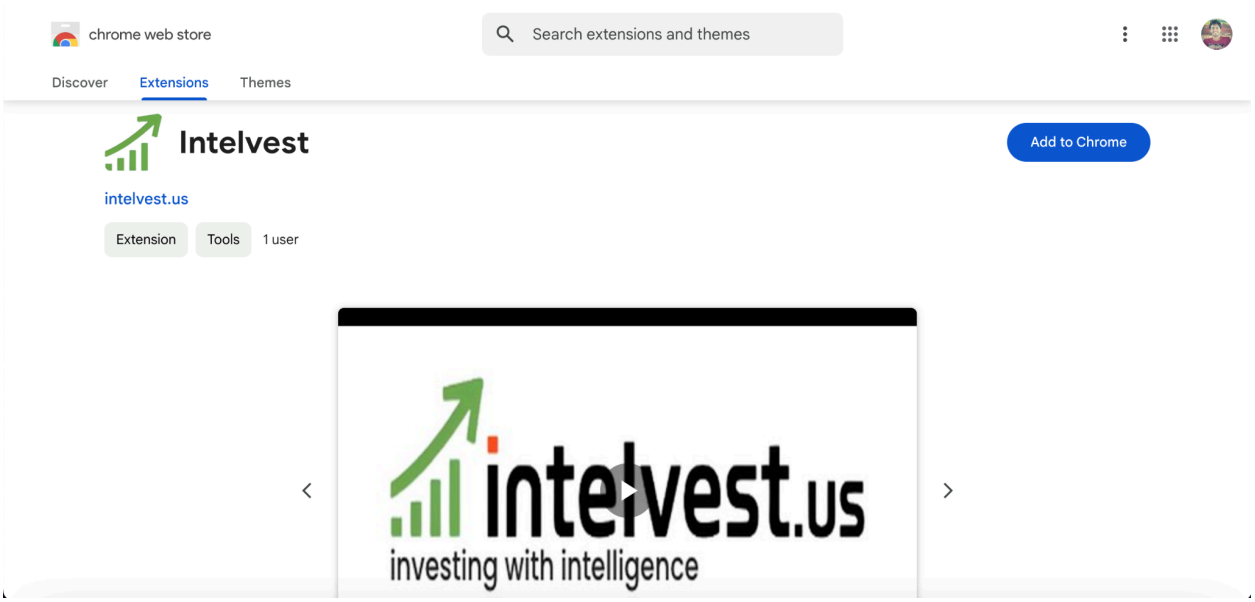
Visit Intelvest website by clicking on the link
https://intelvest.us/



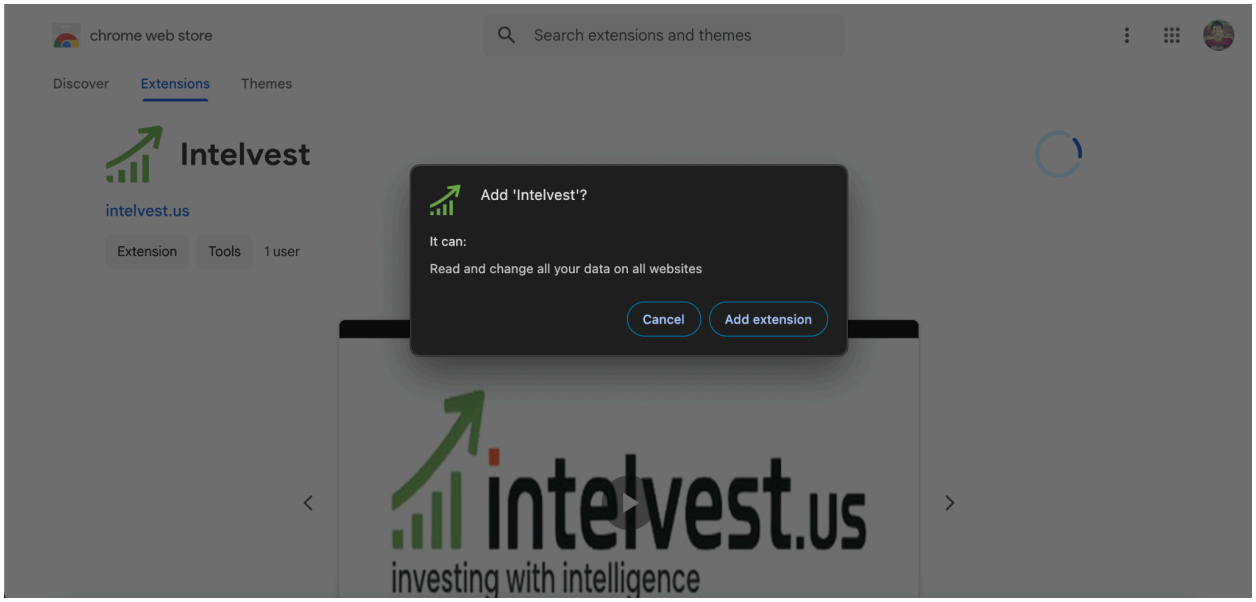
On the top of the menu bar, click on Download Chrome extension.

You can also download the browser plugin from https://chromewebstore.google.com/detail/intelvest/hkfbcbimjlgeemmbfjgoiiloadlibejg

Watch our video on Intelvest:The Future of AI-Powered Investing|Transforming Investment Research & Portfolio Management for a thorough understanding and walkthrough.

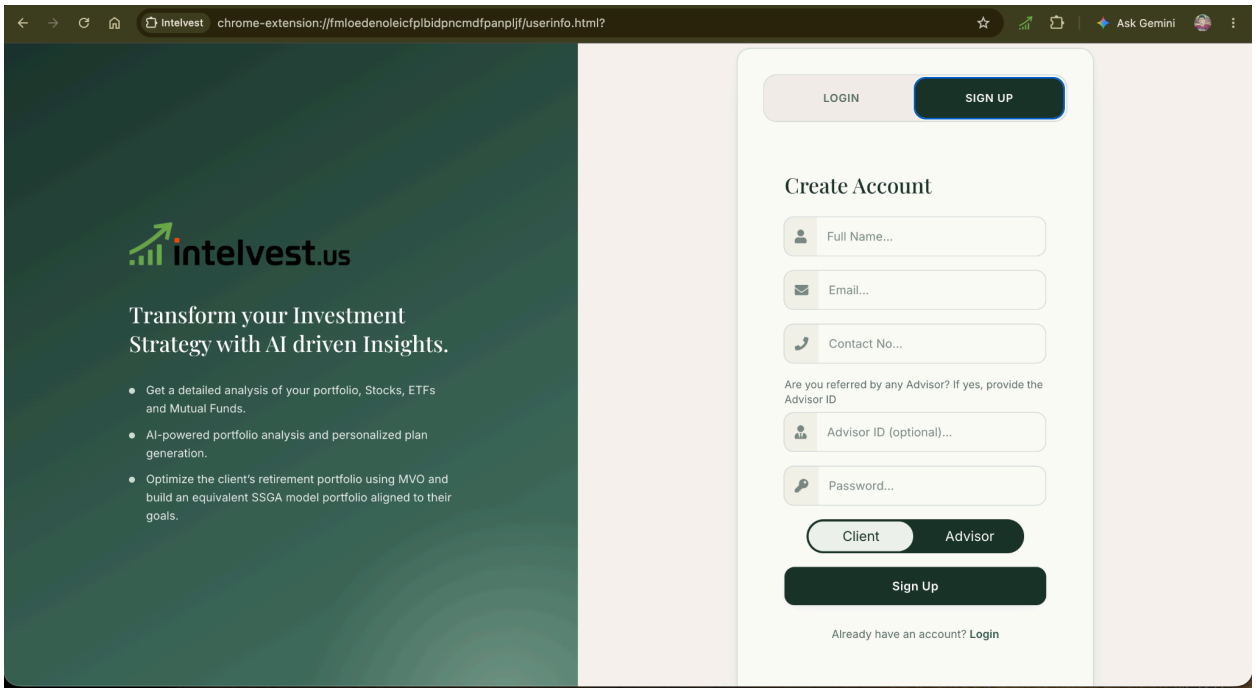


Click on “**Add to Chrome**”.



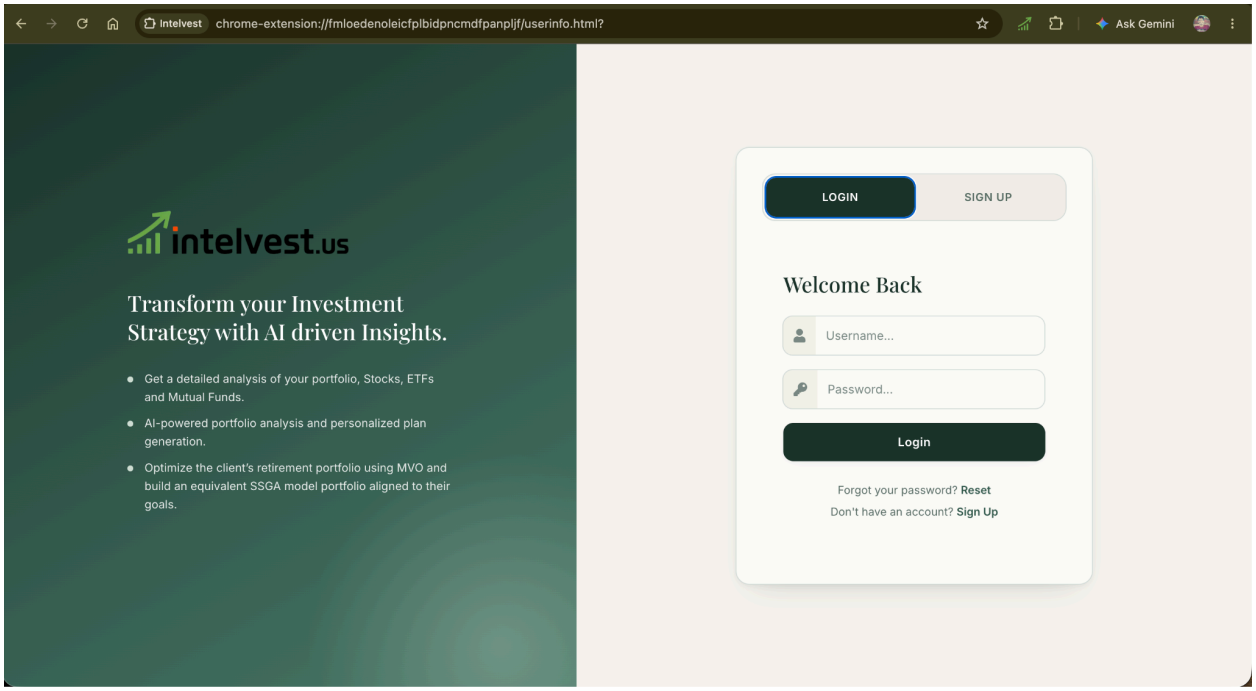
Once you click on the “**Add to Chrome**” button it will display the permissions. The extension requires that permission for usability. Click on “**Add extension**”.

As soon as the extension gets installed, it will open up the Login/Signup screen in the new tab.



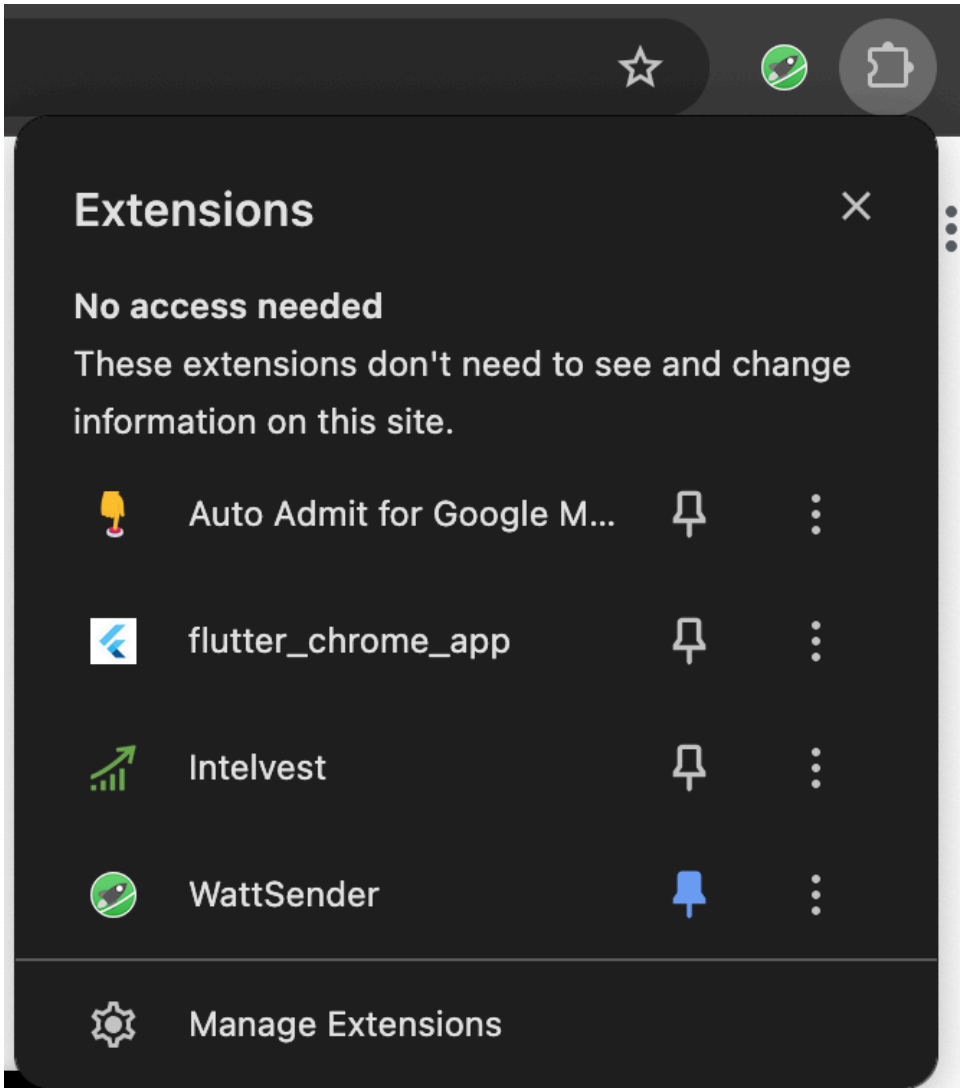
If you have already created an account earlier, you can proceed with Login OR if you are a new user, select the Sign Up tab, fill in the required details and create your account by clicking on the “Sign Up” button. Do select if you are a client or an advisor.

On successful completion of registration, the tab would automatically change to Login.



Enter the email address provided during registration as the Username and enter the password that you have set. Click on “Login”. If you do not remember your password, click on “Reset”.

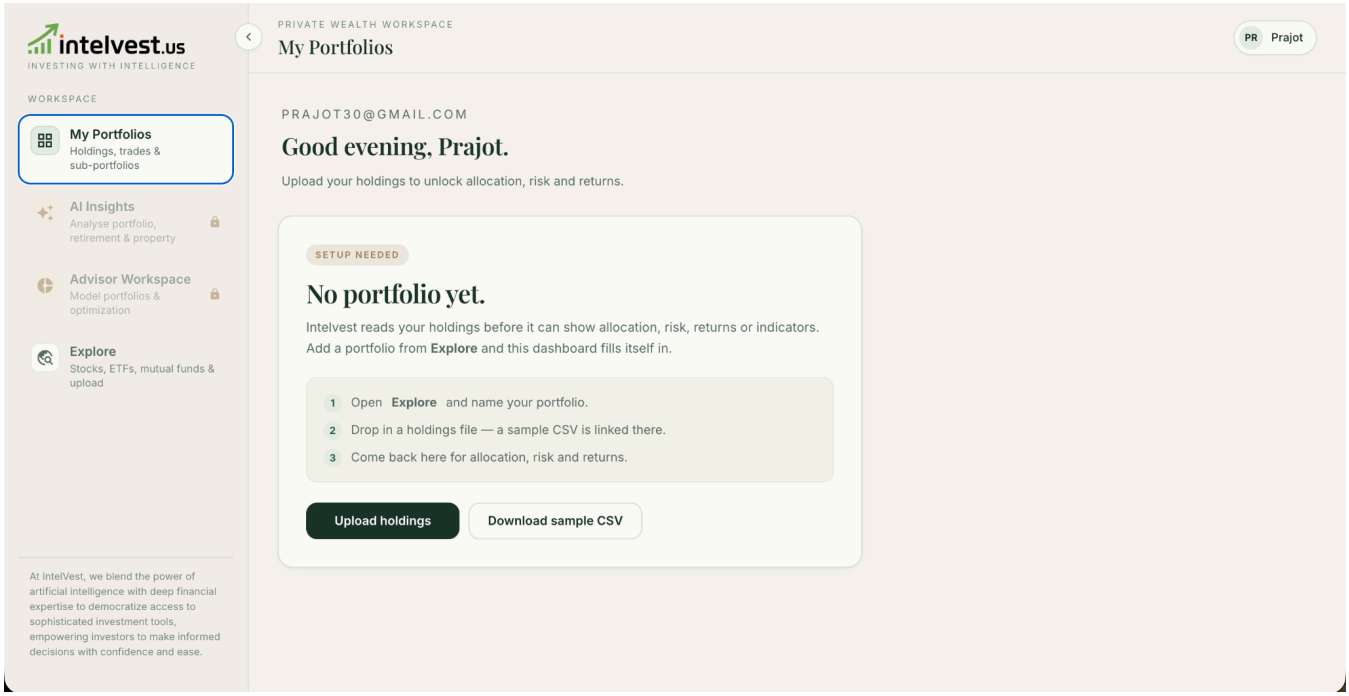
On successful login the Login/Signup, it will open up the dashboard with My Portfolios screen listing the portfolios that you hold. In case you do not have any portfolios uploaded, it will open the Explore section where you can select any stock and analyse it.
Click on the extension icon in the browser, you will see the icon of Intelvest plugin along with the other extensions that you have installed. Click on the pin icon beside it so that its icon is always visible besides the extension icon in the browser.

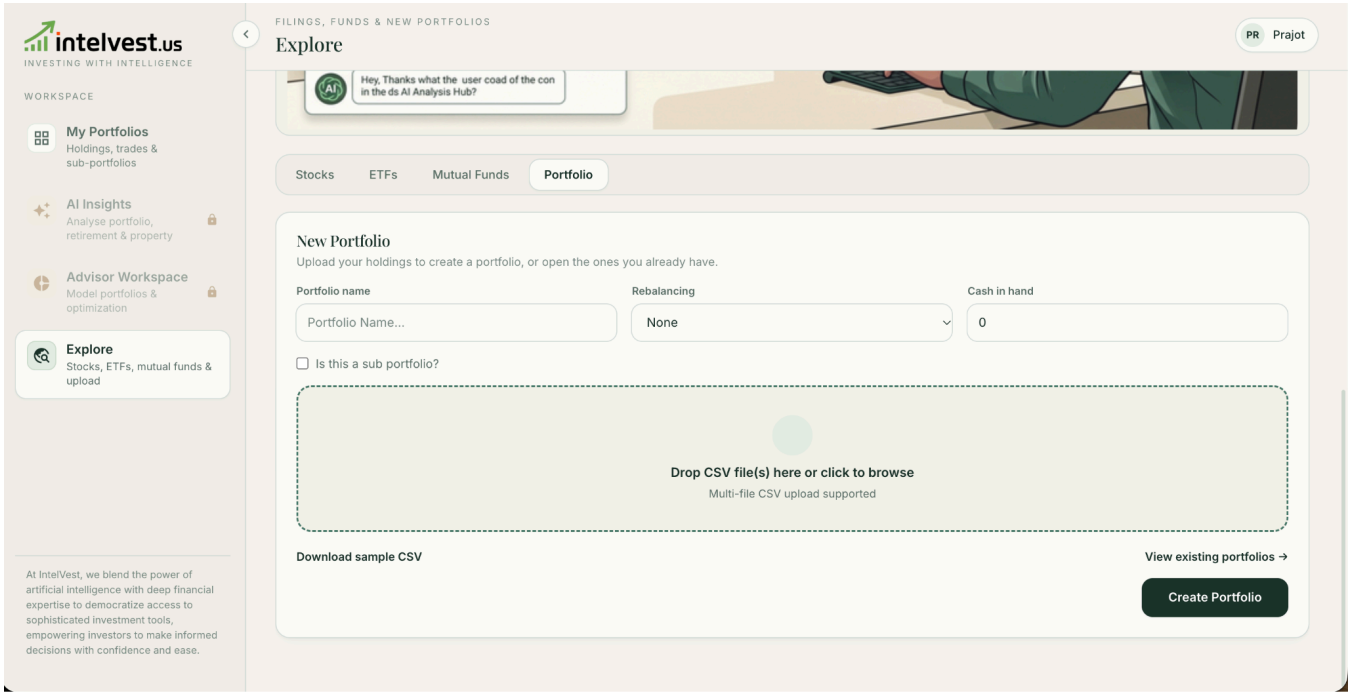


Henceforth whenever you want to access the plugin, just click on the Intelvest icon.



1) My Portfolios





The retail investor or the institutional investor or the RIA (Registered Investment Advisor) for the retail investor can upload his or their clients portfolio to understand

various Risk and Returns metrics via visualization. Click on the “Download sample CSV” to download it and then have your portfolio as per the sample csv.

Please enter the portfolio name, rebalancing period, cash in hand and upload the CSV of your portfolio.

Now we will look into how the portfolio csv file should be. For this you can refer to the "Sample CSV". On clicking Sample CSV, it would download the csv file.

When you open it, it would look something like this. So there are two formats that we support.

	A	B	C	D	E	F	G	H	I	J	K
1	symbol	quantity	purchase_price	purchase_date	security_type	asset_type					
2	AAPL	5	225.91	01/11/2024	{stock/etf/mutual_fund}	{equity/bond/crypto/real estate/technology/precious metals}					
3											
4			**OR**								
5											
6	symbol	purchase_date	asset_type	security_type	weight	description	account_type				
7	VINIX	08/10/2018	{equity/bond/crypto/real estate/technology/precious metals}	{stock/etf/mutual_fund}	10	VANGUARD	401K				
8											
9											

In the first format, we have

symbol : that is the symbol of the ticker.
quantity : should be the integer value of the number of units purchased.
purchase_price : The price for which the units were purchased.
purchase_date : date when the units were purchased.
security_type : This can be stock, etf or mutual fund.
asset_type : This can be equity, bond, crypto, real estate, technology or precious metals.

In the second format, we have

symbol : that is the symbol of the ticker.
purchase_date : date when the units were purchased.
asset_type : This can be equity, bond, crypto, real estate, technology or precious metals.
security_type : This can be stock, etf or mutual fund.

weight : weightage of that asset within the portfolio in percentage.
description : That is the name of the asset.
account_type : whether it's 401K or Roth IRA etc. (This is optional).

In both the above types, make sure you put the same column names and same options from the list provided for security type and asset type.

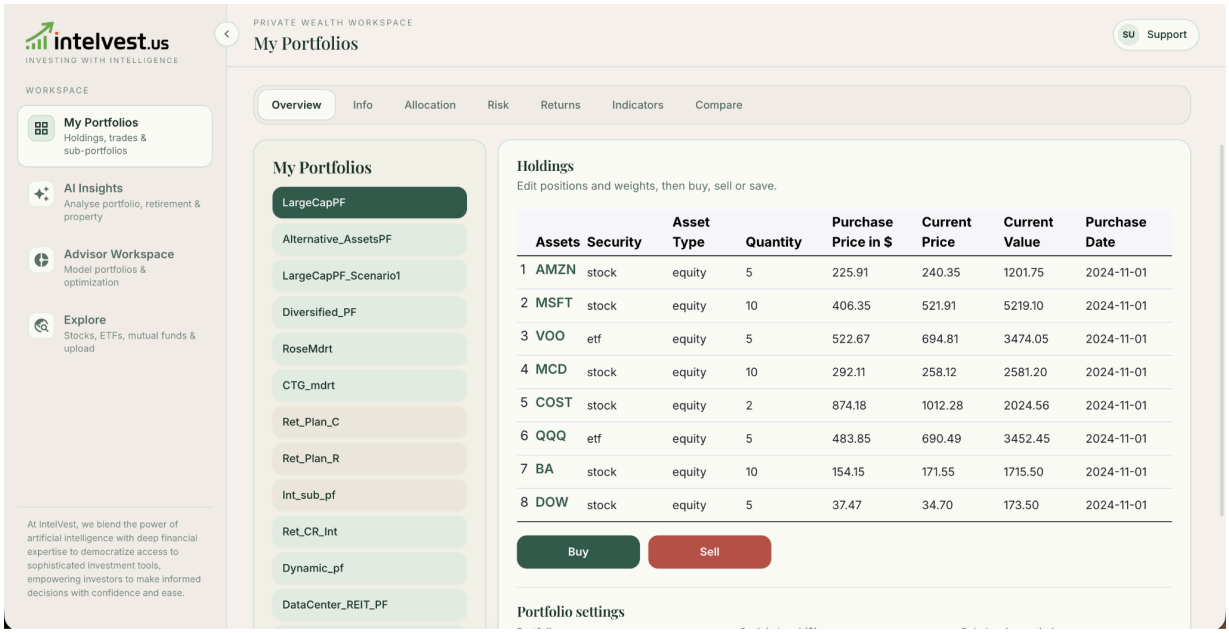
You can either follow the first format, which would look like this.

	A	B	C	D	E	F	G
1	symbol	quantity	purchase_price	purchase_date	security_type	asset_type	
2	GLD	5	250.96	09/05/2024	etf	precious metals	
3	DBE	20	19.25	09/05/2024	etf	oil-gas	
4	BND	10	72.96	09/05/2024	etf	bond	
5	BIL	8	91.59	09/05/2024	etf	bond	
6	VNQ	6	94.12	09/05/2024	etf	real estate	
7	RWR	7	103.86	09/05/2024	etf	real estate	
8							
9							

Or you can go with a second format which would look like this.

	A	B	C	D	E	F	G	H
1	symbol	purchase_date	asset_type	security_type	weight	description	account_type	
2	VINIX	08/10/2018	equity	mutual_fund	10	VANGUARD INST INDEX	401K	
3	JLGMX	08/10/2018	equity	mutual_fund	5	JPM LG CAP GROWTH R6	401K	
4	AVUAX	08/10/2018	equity	mutual_fund	10	AM CENT MD CP VAL I	401K	
5	VSMAX	08/10/2018	equity	mutual_fund	12	VANG SM CAP IDX ADM	401K	
6	RERGX	08/10/2018	equity	mutual_fund	5	AF EUROPAC GROWTH R6	401K	
7	FFSZX	08/10/2018	bond	mutual_fund	20	FID FREEDOM 2065 K6	401K	
8	FHTKX	08/10/2018	bond	mutual_fund	20	FID FREEDOM 2040 K6	401K	
9	PDBZX	08/10/2018	bond	mutual_fund	3	PGIM TOTAL RTN BD Z	401K	
10	FVTKX	08/10/2018	bond	mutual_fund	15	FID FREEDOM 2060 K6	401K	
11								
12								

Once you upload your portfolio, you will get the following screen



You can navigate through the horizontal tabs to know more about the selected portfolio. The Info tab will provide you the basic info of the portfolio along with the wealth index.

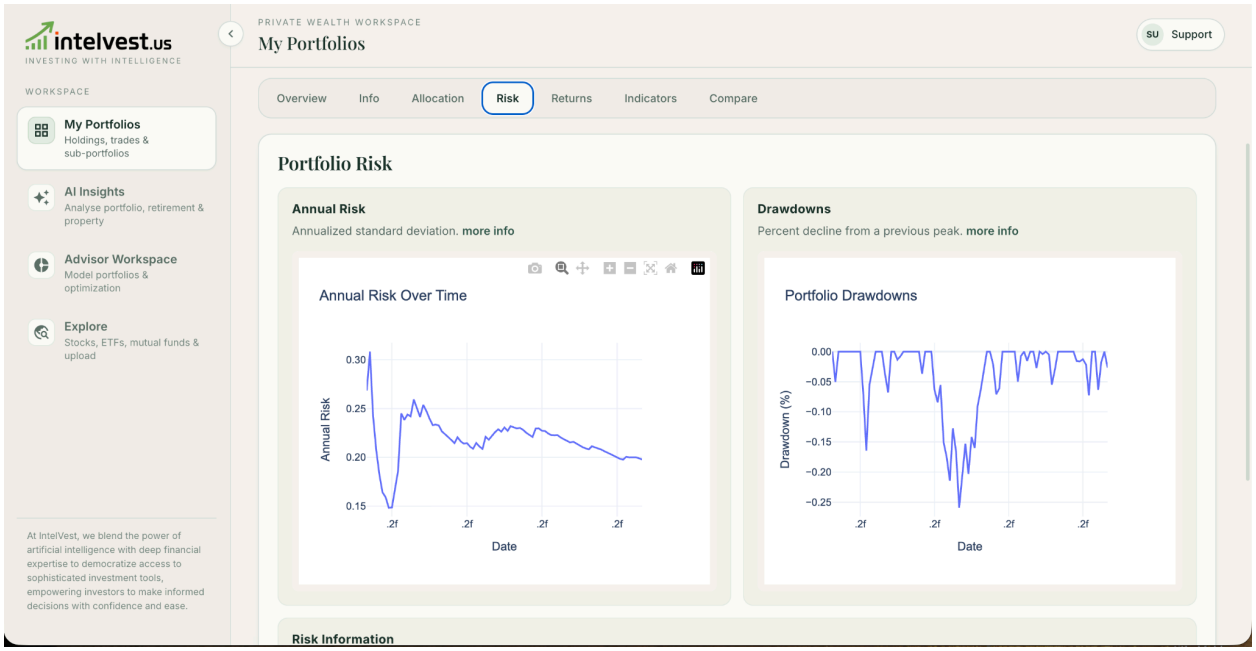
a) Asset Allocation

You will also see the weight distribution based on the uploaded portfolio.



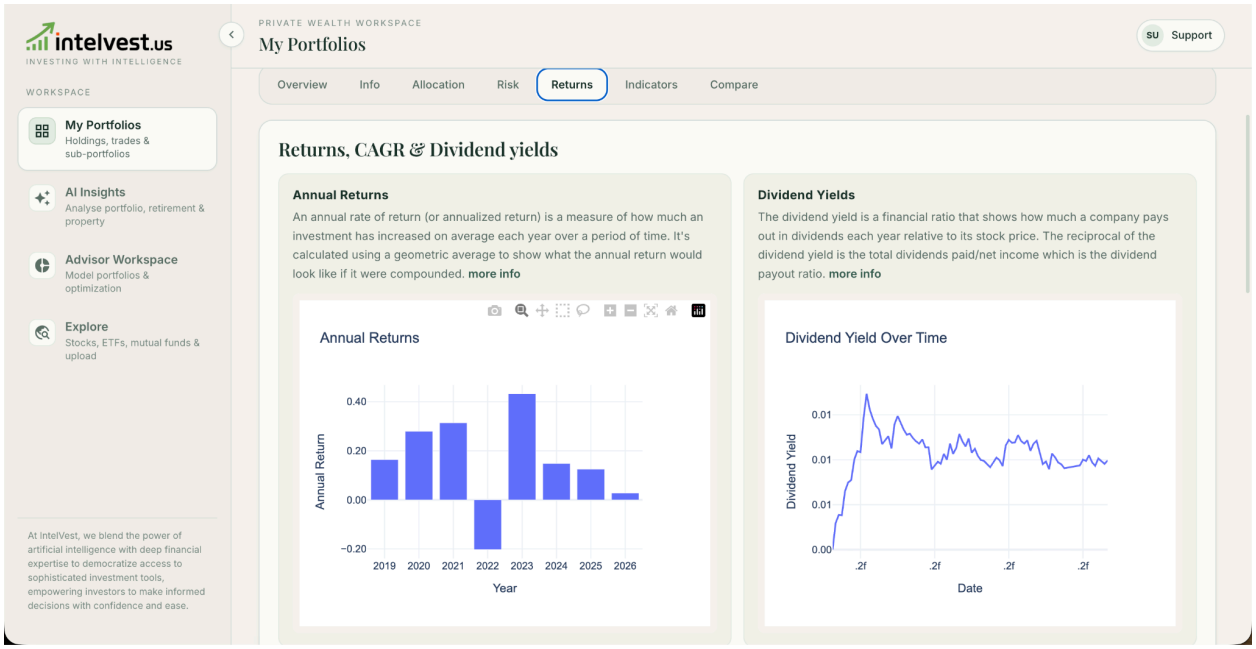
b) Risk Metrics

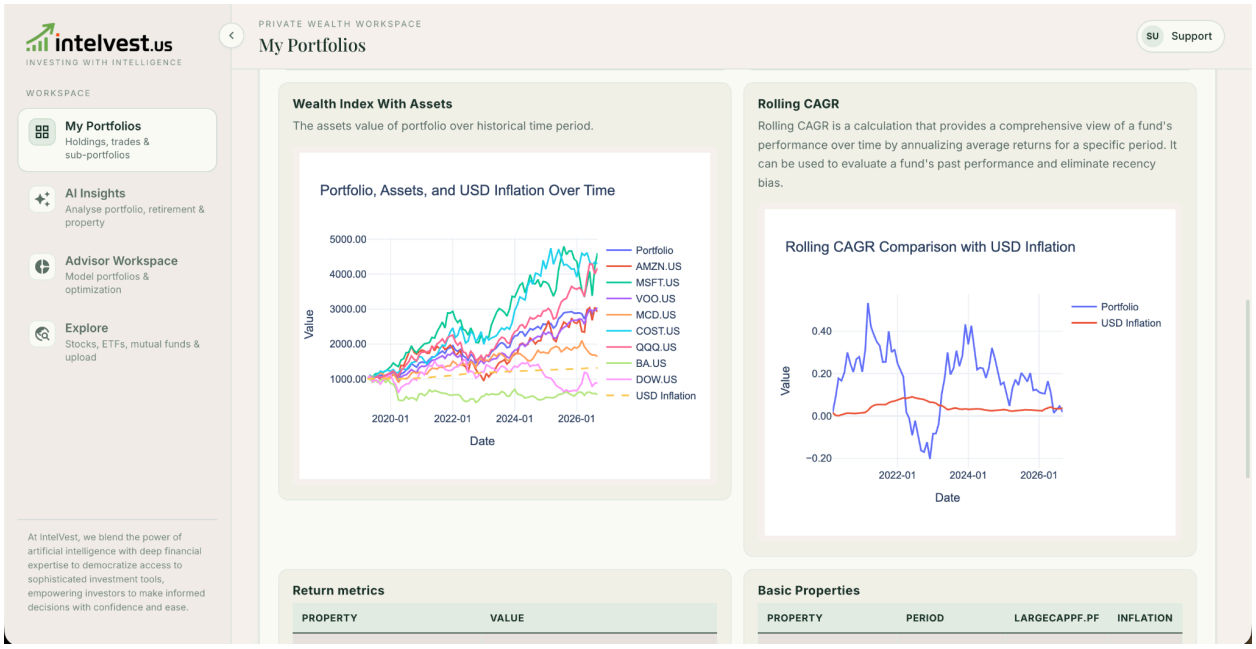
Next tab is the Risk Profile where you will get to see various Risk metrics like Annual Risk, Drawdowns, var, Cvar and diversification ratio.



c) Return Metrics

Similarly there is Return Profile which will show Annual Returns, Dividend Yield, Wealth Index and Rolling CAGR.

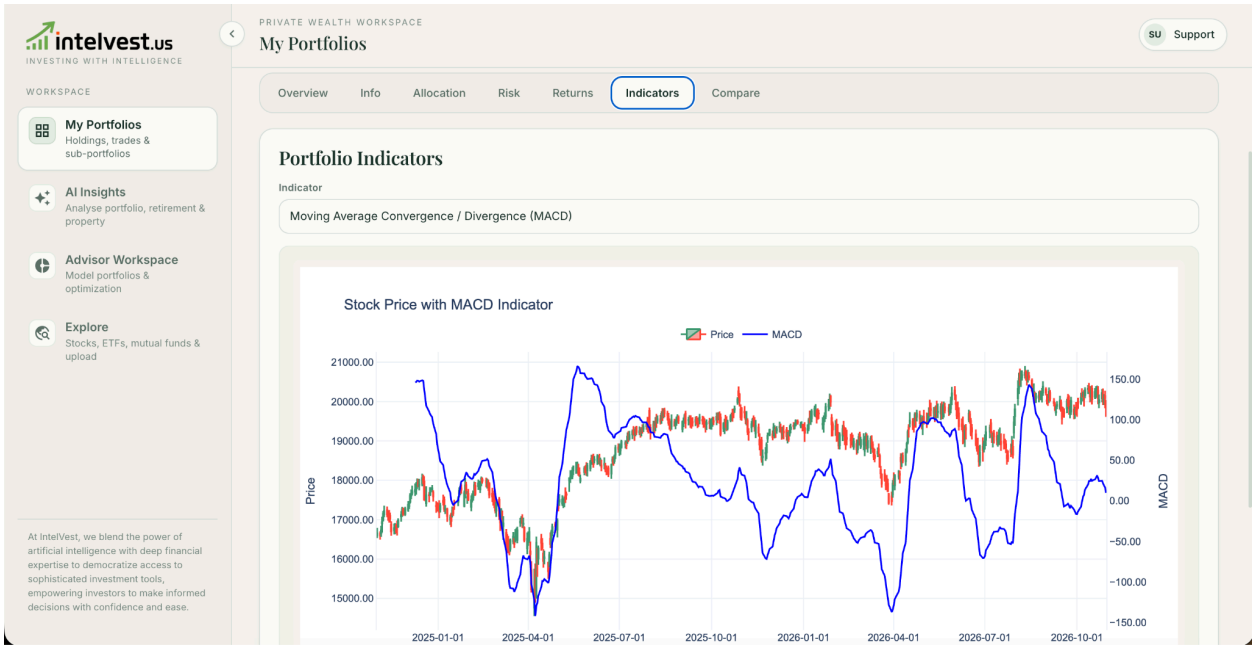




d) Portfolio Indicators

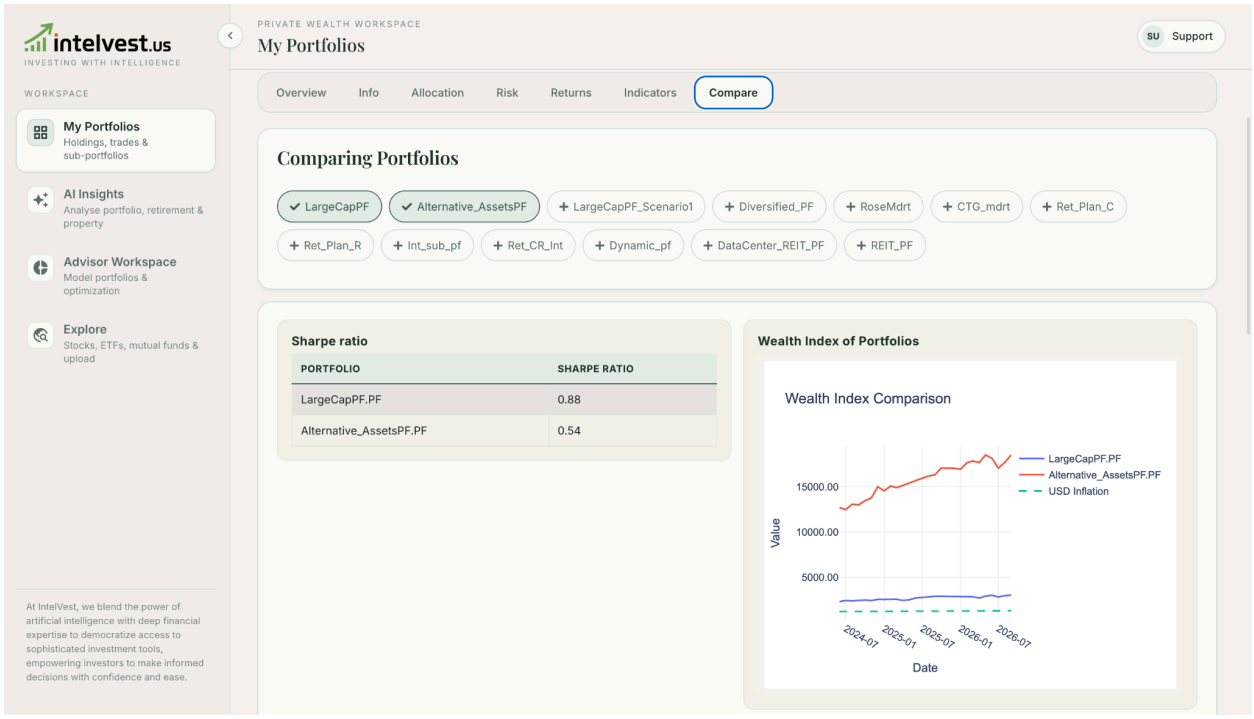
We are also showing various portfolio indicators like

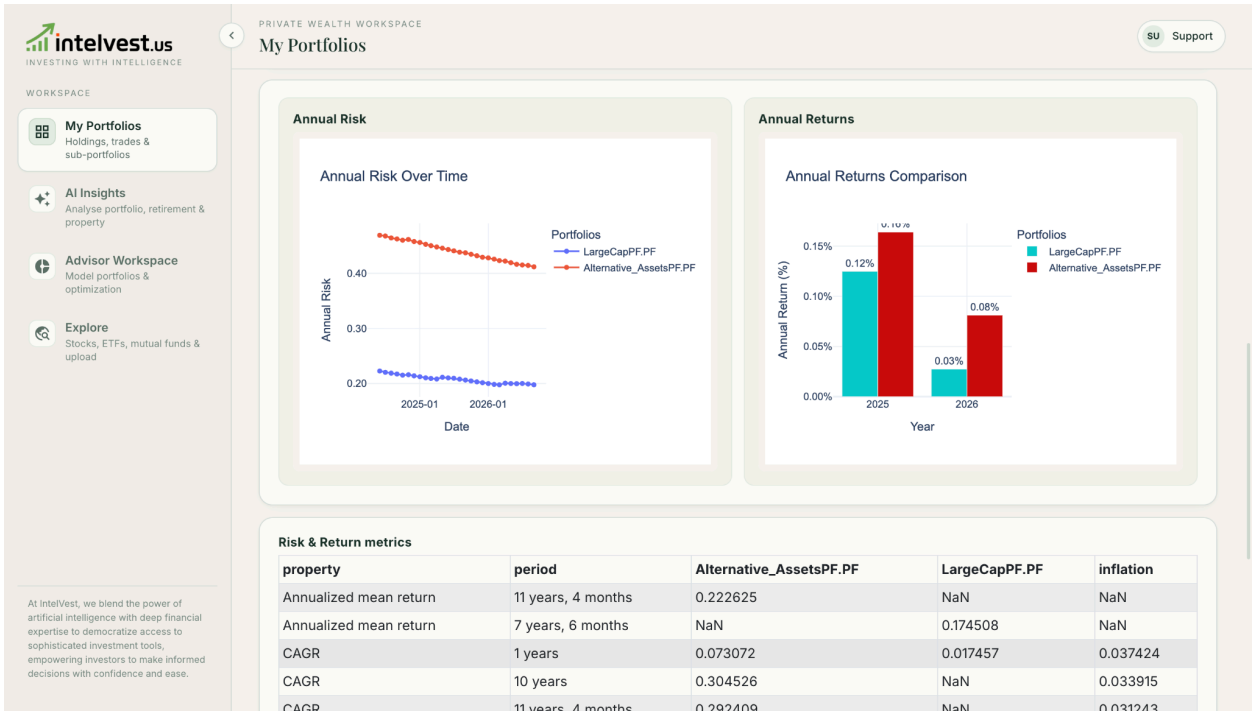
- Moving Average Convergence / Divergence (MACD)
- Volume Weighted Average Price (VWAP)
- Bollinger Bands



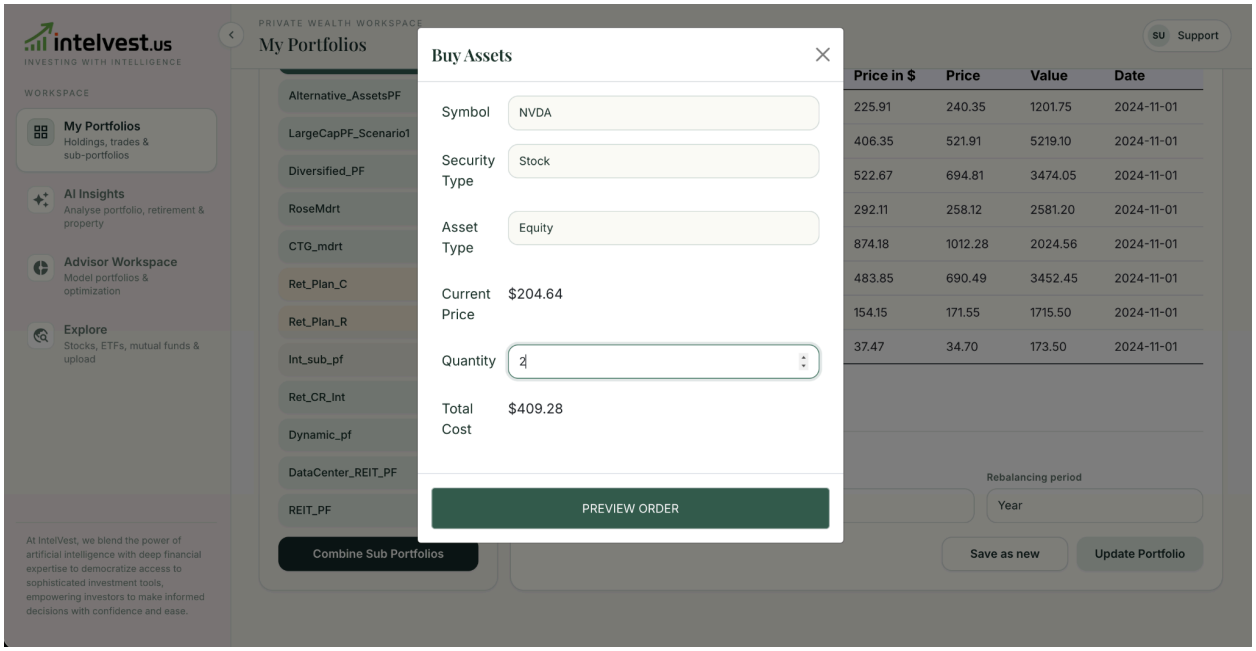
e) Comparing Portfolios

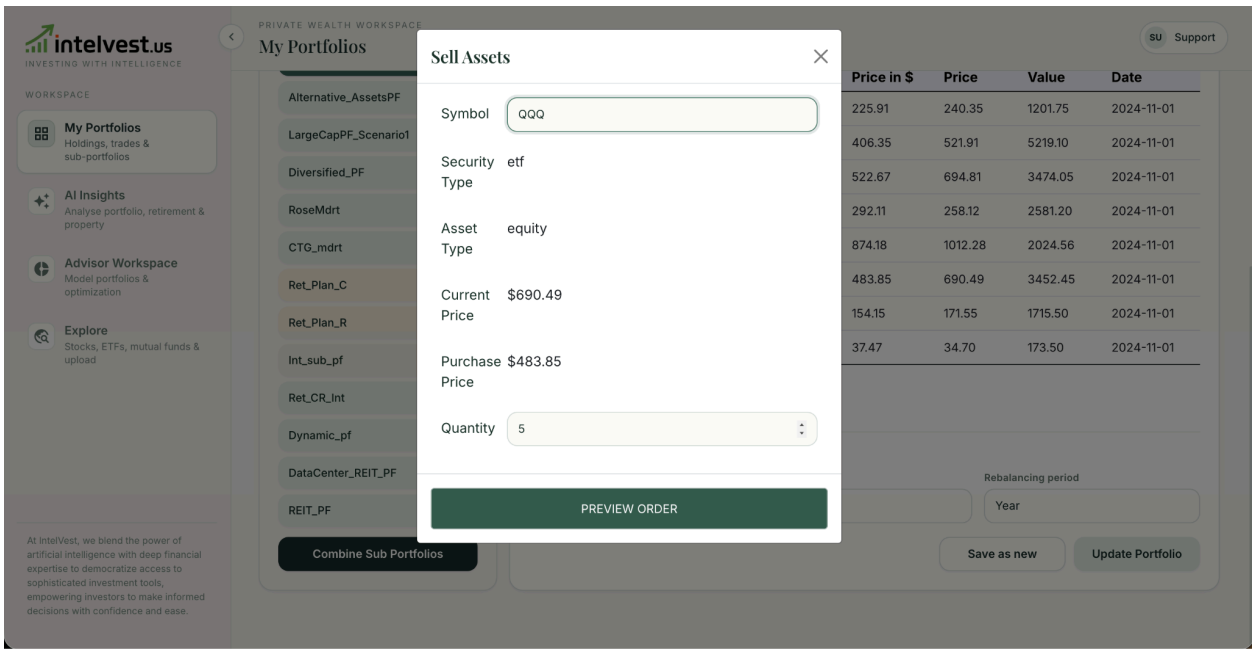
You will be able to compare the list of portfolios that you have created for various metrics like risk, returns and wealth index.



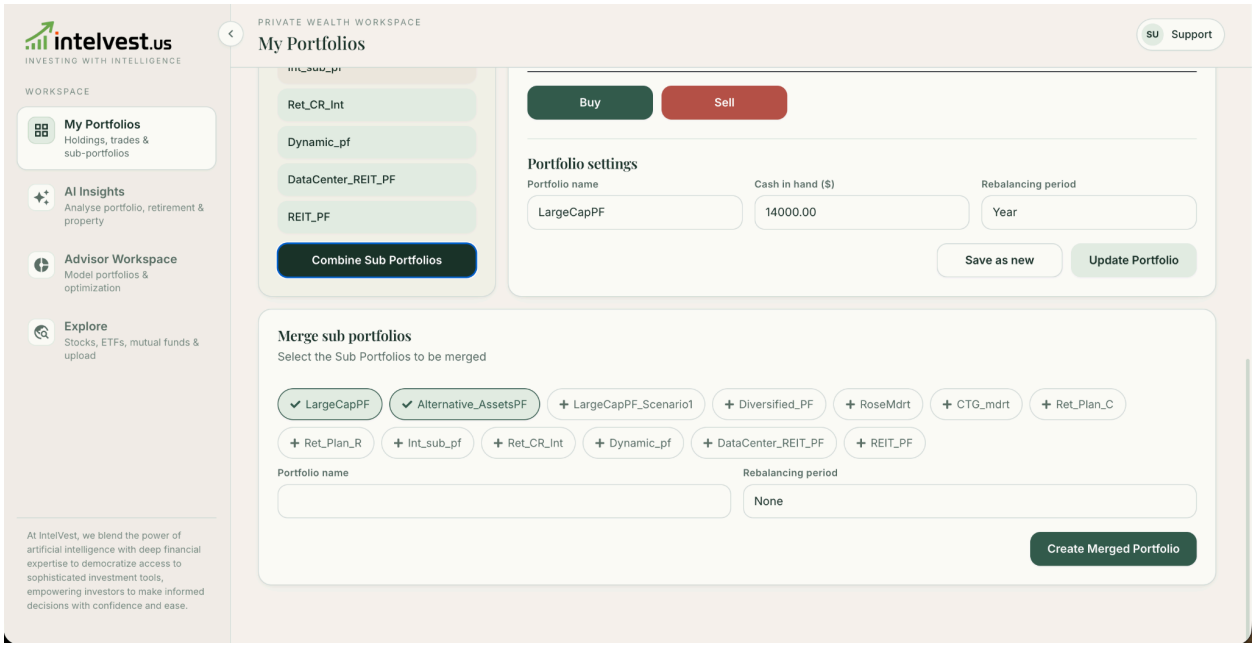


The investor can also Buy assets and Sell assets modifying their portfolios and visualise the difference in the metric using charts.



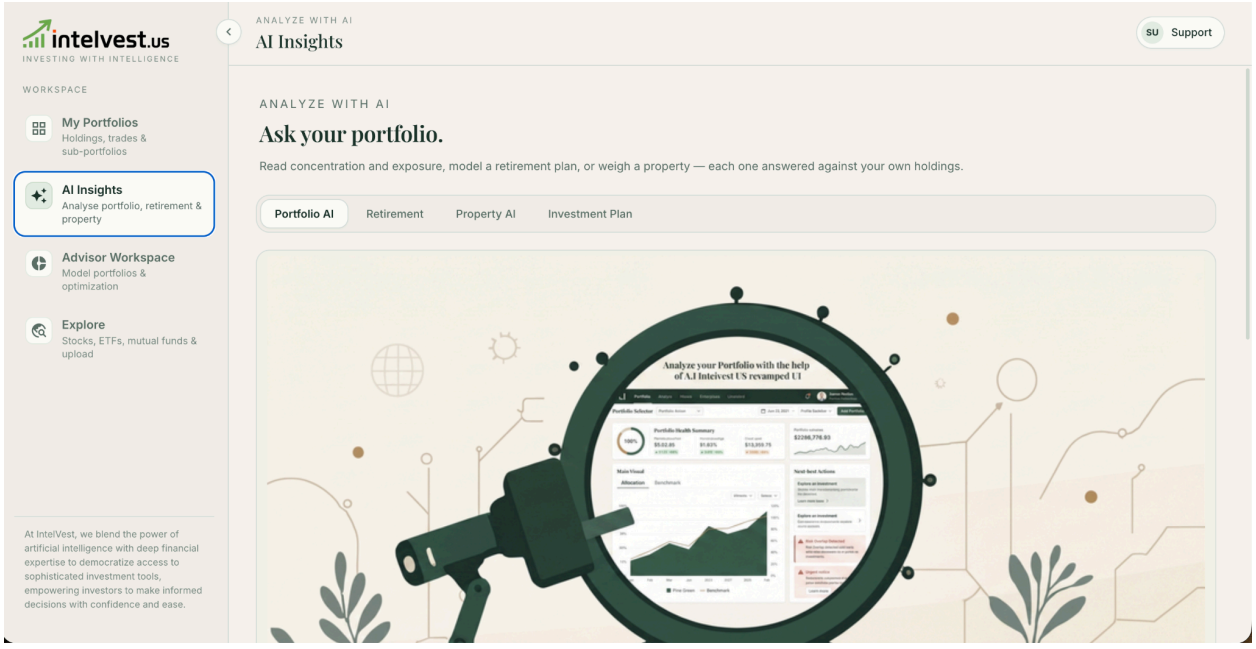


You also get an option to merge any two sub portfolios and form a new portfolio.



2) AI Insights

These are the features where we make use of AI to analyse your portfolio, to generate a retirement plan, to analyse a rental property and to come up with an investment plan with a plancast.

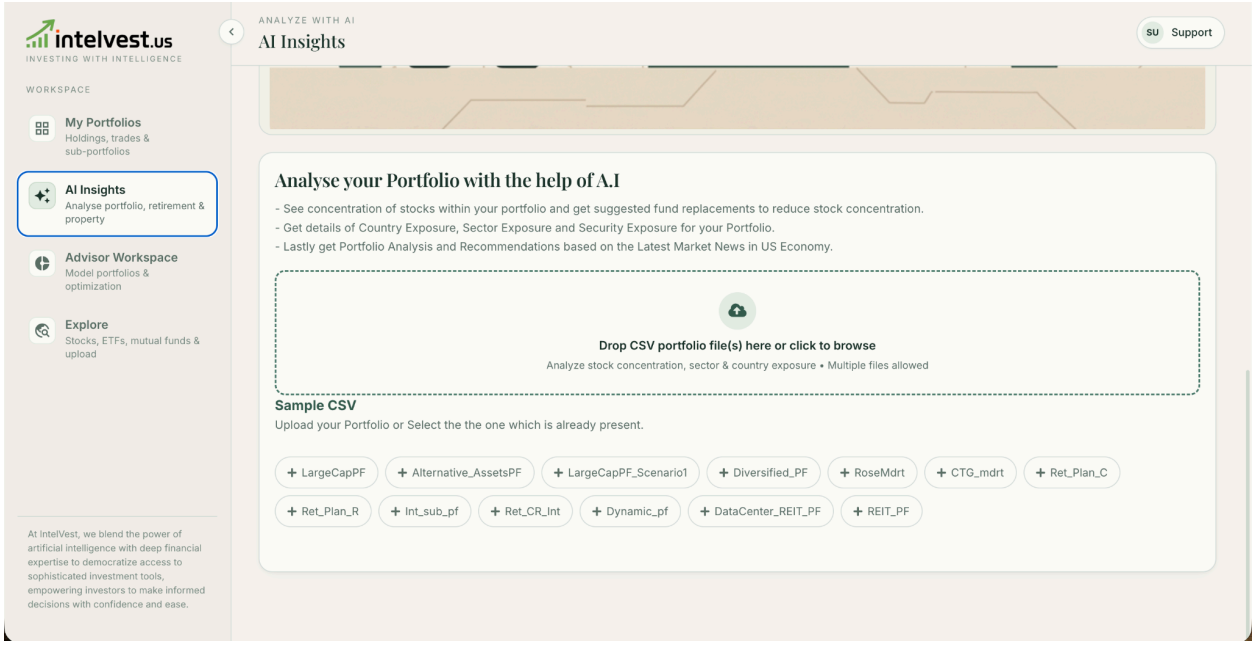


a) Portfolio AI

It is a DIY tool for analysing the portfolio by both the retail investors and the registered investment advisor. Everyone wants to see how their portfolio performs or will perform when there are certain political or economic decisions and global events that affect the market. Our platform uses AI and checks for certain exposures within the portfolio and brings it to your notice giving you some suggestions or advice based on the market condition.

The advisor can make use of this feature to explain to their clients the outcomes of the analysis based on the current market conditions. To begin, simply upload your portfolio in CSV format. We've made it easy for you, just refer to our sample CSV file to ensure the format is correct.

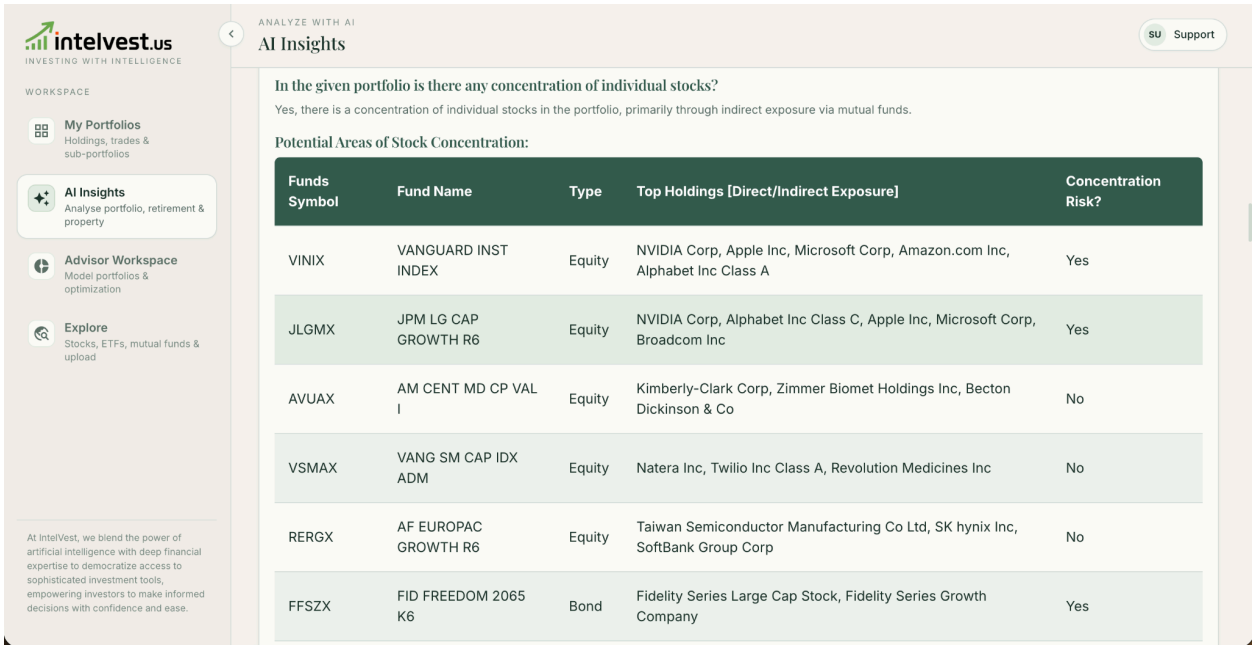
The client can upload his portfolio or select one of the portfolios that he has in his account and make use of the platform to analyse it. Similarly the advisor can make use this feature to explain to their clients the outcomes of the analysis based on the current market conditions.

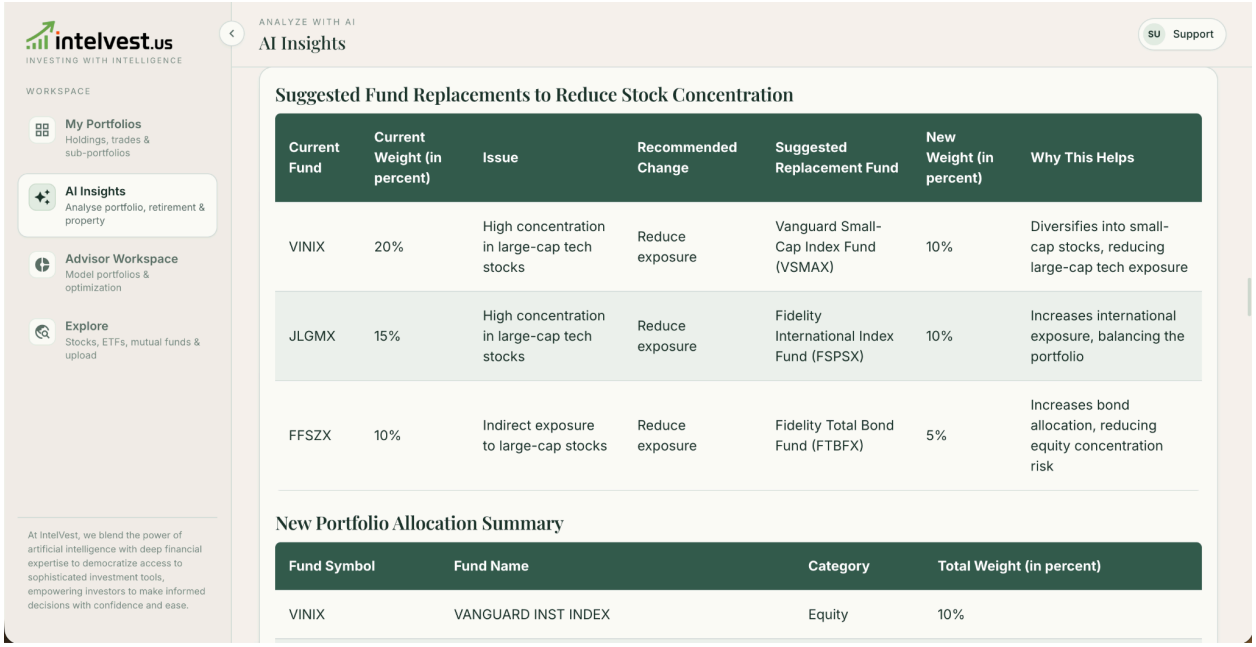


Refer to our sample CSV file to ensure the format is correct. Please refer to the earlier section of this manual where this is explained in detail.

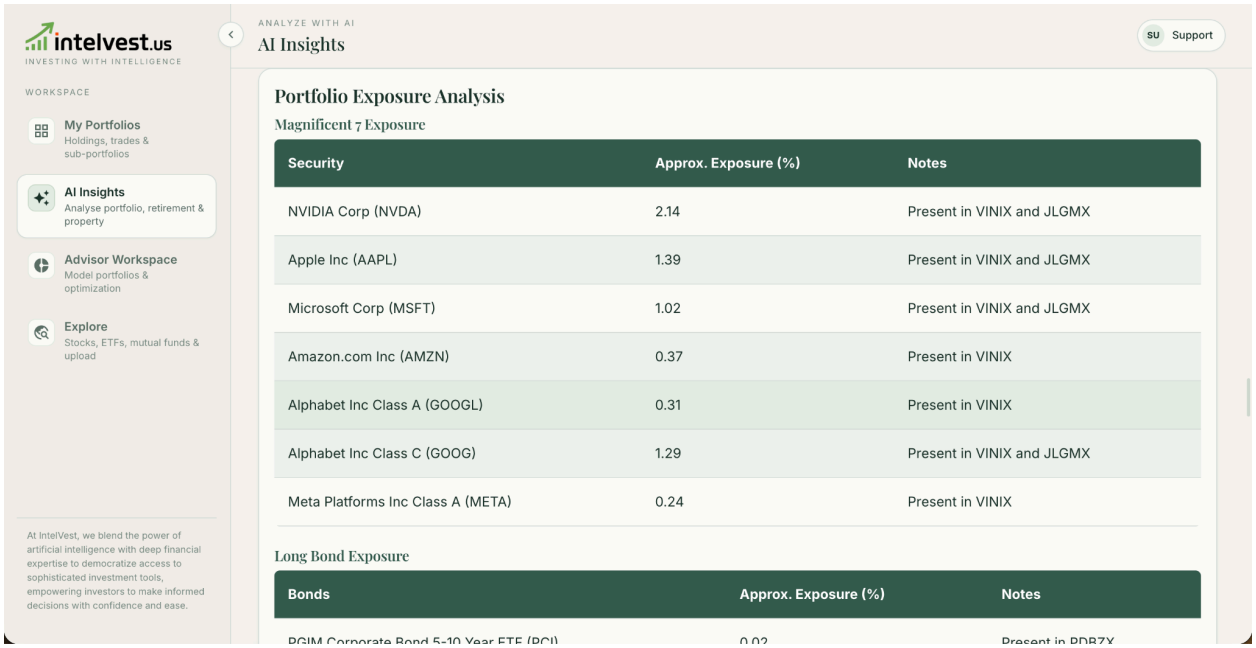
Once the portfolio is selected or uploaded, you will get the analysis done by A.I.

The analysis will include potential areas of stock concentration within the portfolio and recommend suggestions to replace funds to reduce the stock concentration.

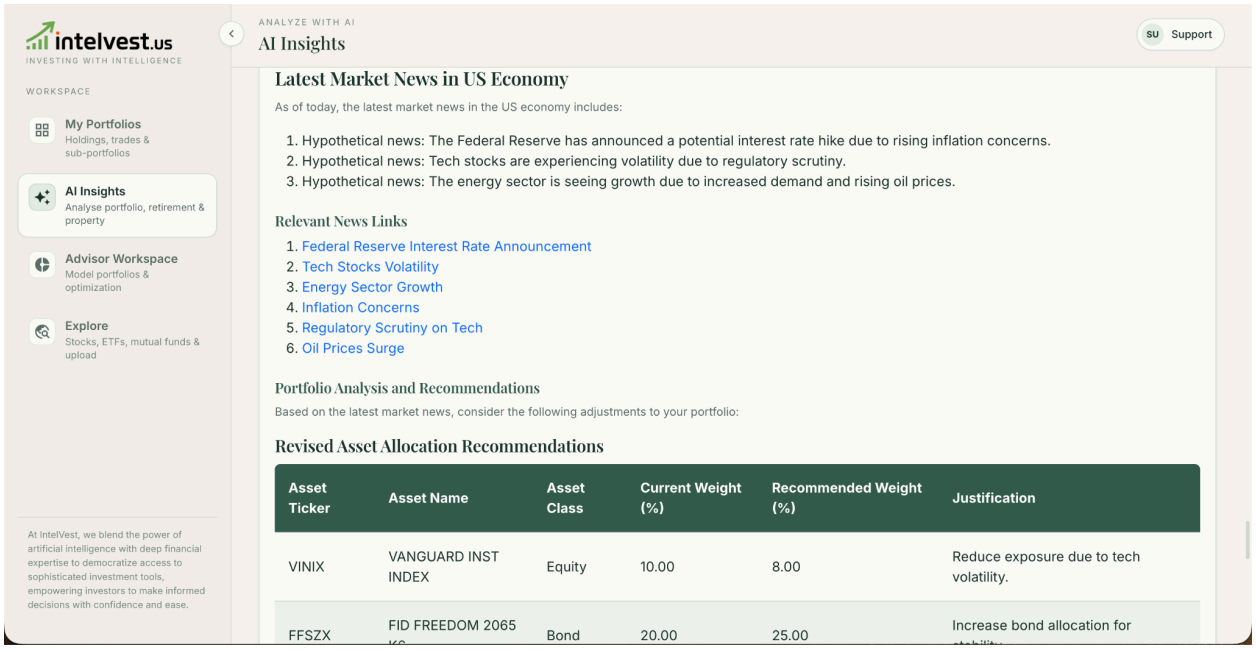




It will also provide you Portfolio Exposure analysis which includes Magnificent 7 exposure, Bond Exposure, Country Exposure and Sector Exposure.



Finally you will get the latest market news in the U.S economy and what impact has it made on your portfolio. You will get revised asset allocation of your portfolio based on the market news along with the list of stocks which have not performed well since.



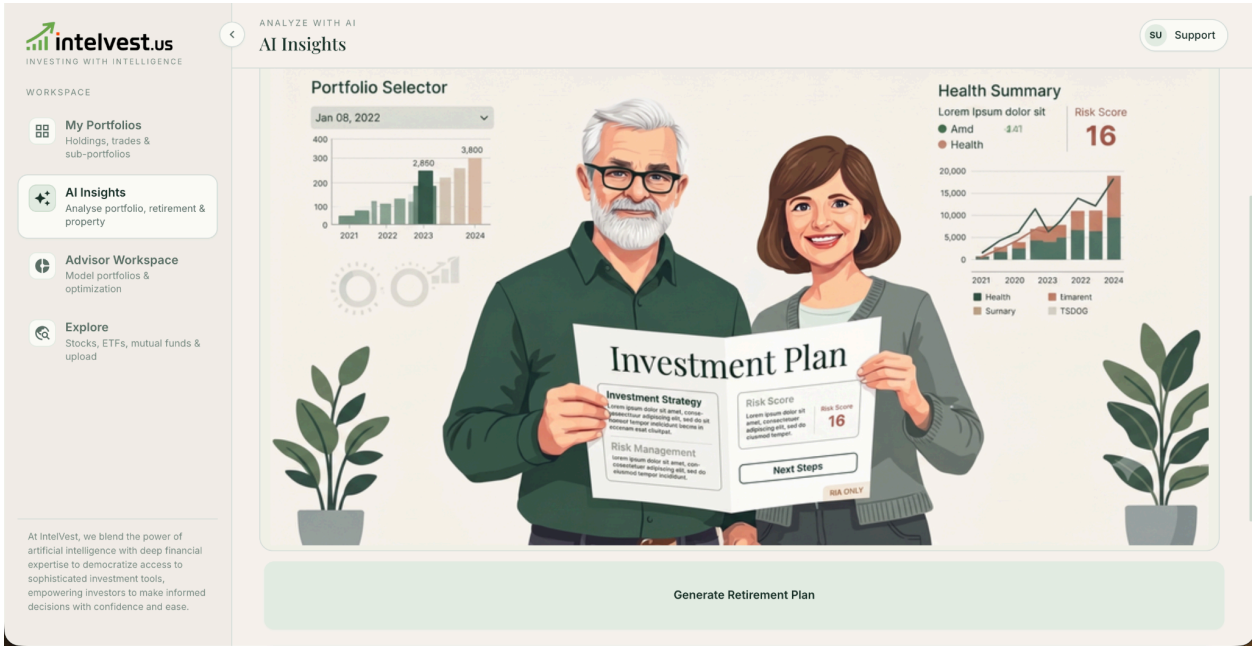
If the retailer investor is making use of this feature it is always advisable to discuss with your advisor or financial professional before you go ahead with the suggested allocation changes.

b) Retirement Plan

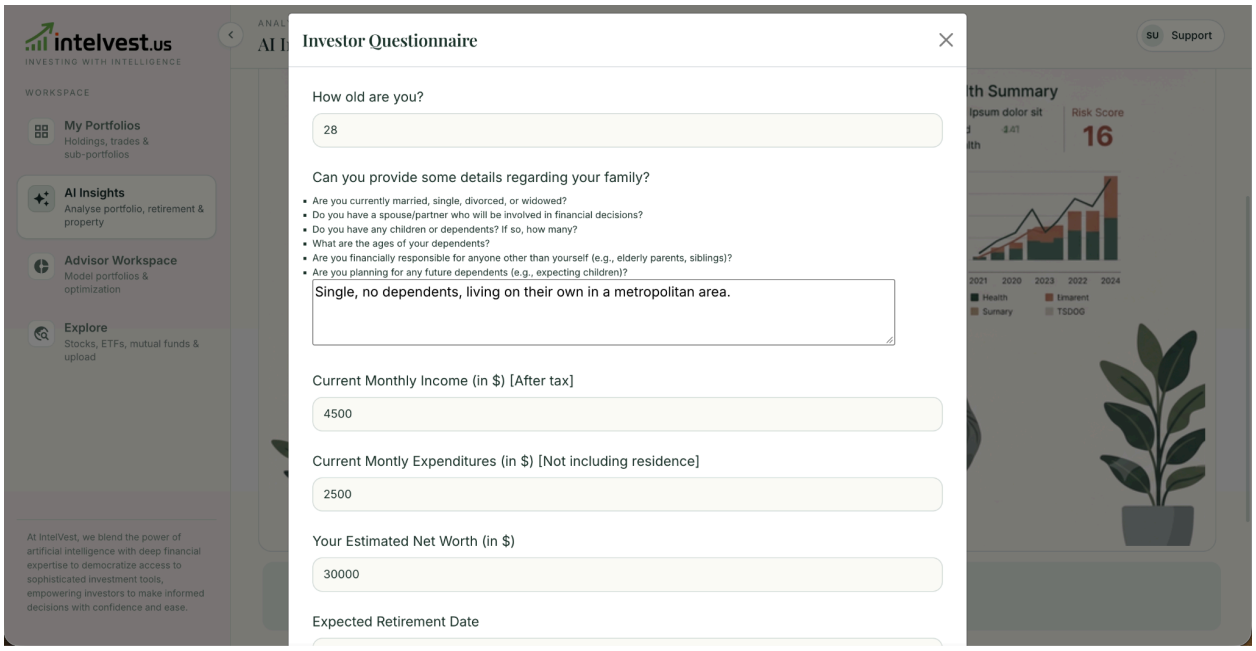
The ability to fill a simple form and quickly establish a rapport with a client and generate an investment plan that can then be further customized is a very important asset to Investment Advisors that Intelvest provides. The transparency and ease of this process makes it a very valuable benefit both to the investment advisor and to the client.

The form can be filled either by the client alone or by the client along with the advisor in an Online Zoom call or Google Meet. The Intelvest platform uses this form to take the next steps including plan generation as well as goals and objectives and help create a long term fiduciary relationship with the client. The process accommodates inflation, as well as the asset investment and cash withdrawal plan to meet various client objectives and goals.

Being able to do this rapidly with the power of Generative AI is a key feature of Intelvest and other cutting edge Intelligent Gen AI based Investment Management Platforms.



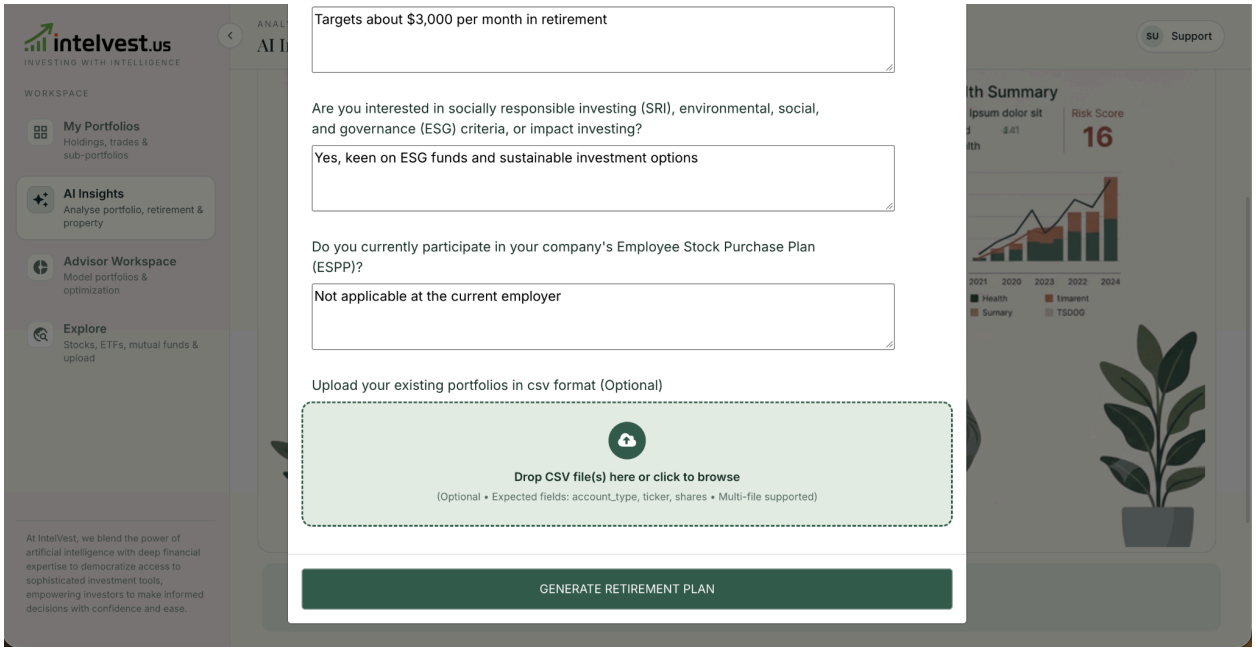
Once you click on the "Generate Retirement Plan" button, it will open up a form with an Investor questionnaire. It will ask you to enter all the necessary details required to come up with a personalized retirement plan.



Following are the questions asked in the questionnaire.

- How old are you?
- Can you provide some details regarding your family?
- Current Monthly Income (in $) [After tax]
- Current Monthly Expenditures (in $) [Not including residence]
- Your Estimated Net Worth (in $)
- What is your expected Retirement Date
- Can you provide some details on your home ownership?
- Can you provide info on your Mortgage & Loan Details?
- Select your Risk Appetite
- What are your Goals and Preferences?
- Can you provide details on Family related responsibilities?
- Do you have a pension if any?
- Are you currently receiving Social Security benefits?
- Do you currently have long-term care insurance?
- Any other payments?
- What are your current sources of income (e.g., salary, business, investments, rental properties)?
- Do you have an emergency fund? If so, how many months' worth of expenses does it cover?
- Have you experienced any significant market downturns in the past? How did you react to those situations?
- Time Horizon and Liquidity Needs
- Tax considerations

- How much money do you need every month after retirement?
- Are you interested in socially responsible investing (SRI), environmental, social, and governance (ESG) criteria, or impact investing?
- Do you currently participate in your company's Employee Stock Purchase Plan (ESPP)?
- His current portfolio and account type.



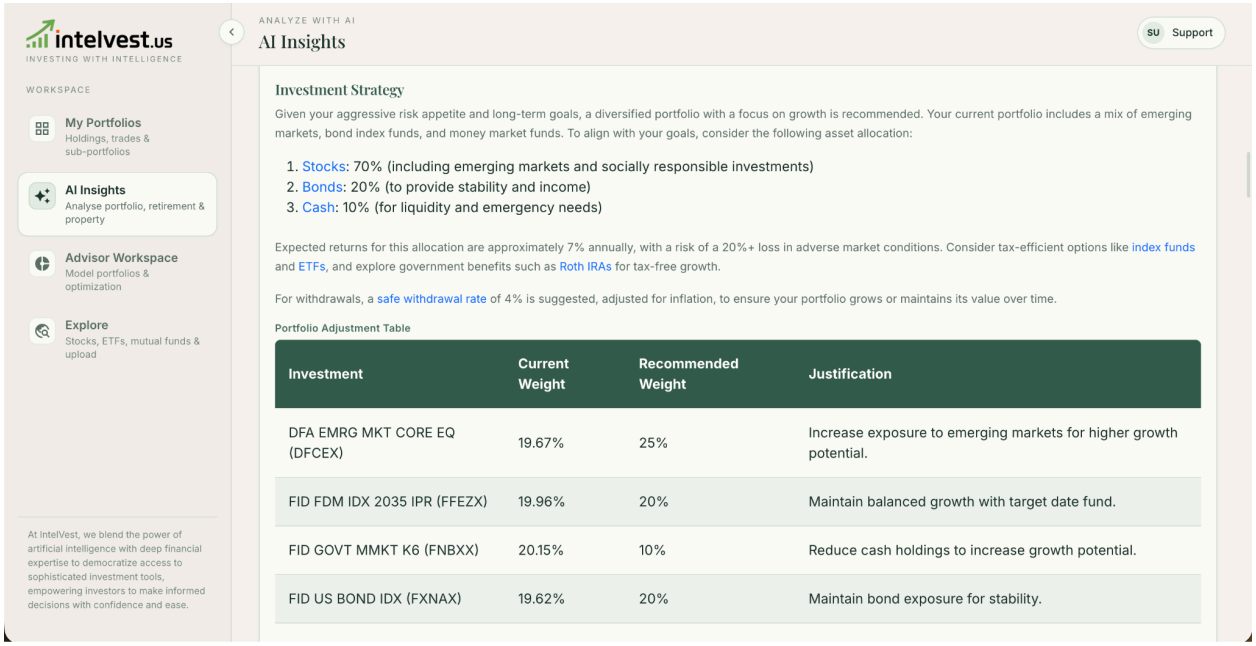
The aim is to build an investment plan on the basis of a conversation held between the advisor and the client. All the necessary information is garnered from the form with the additions added by the investment advisor. If necessary the investment advisor can also add his own information.

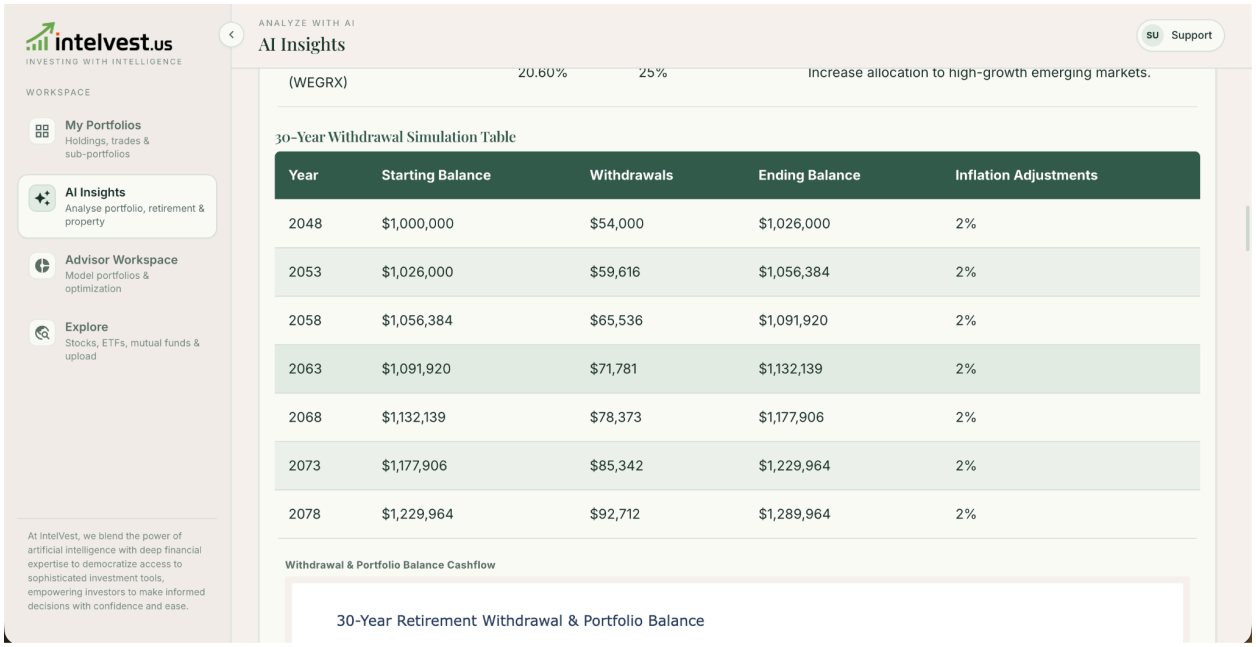
At the end you can upload your existing portfolios in CSV format. **Make sure that your CSV file has the column account_type.**

	A	B	C	D	E	F	G	H
1	symbol	purchase_date	asset_type	security_type	weight	description	account_type	
2	VINIX	08/10/18	equity	mutual_fund	10	VANGUARD	401K	
3	JLGMX	08/10/18	equity	mutual_fund	5	JPM LG CAP	401K	
4	AVUAX	08/10/18	equity	mutual_fund	10	AM CENT MI	401K	
5	VSMAX	08/10/18	equity	mutual_fund	12	VANG SM CA	401K	
6	RERGX	08/10/18	equity	mutual_fund	5	AF EUROPAC	401K	
7	FFSZX	08/10/18	bond	mutual_fund	20	FID FREEDOI	401K	
8	FHTKX	08/10/18	bond	mutual_fund	20	FID FREEDOI	401K	
9	PDBZX	08/10/18	bond	mutual_fund	3	PGIM TOTAL	401K	
10	FVTKX	08/10/18	bond	mutual_fund	15	FID FREEDOI	401K	
11								
12								

Once all the details are filled, click on the "Generate Retirement Plan" button.

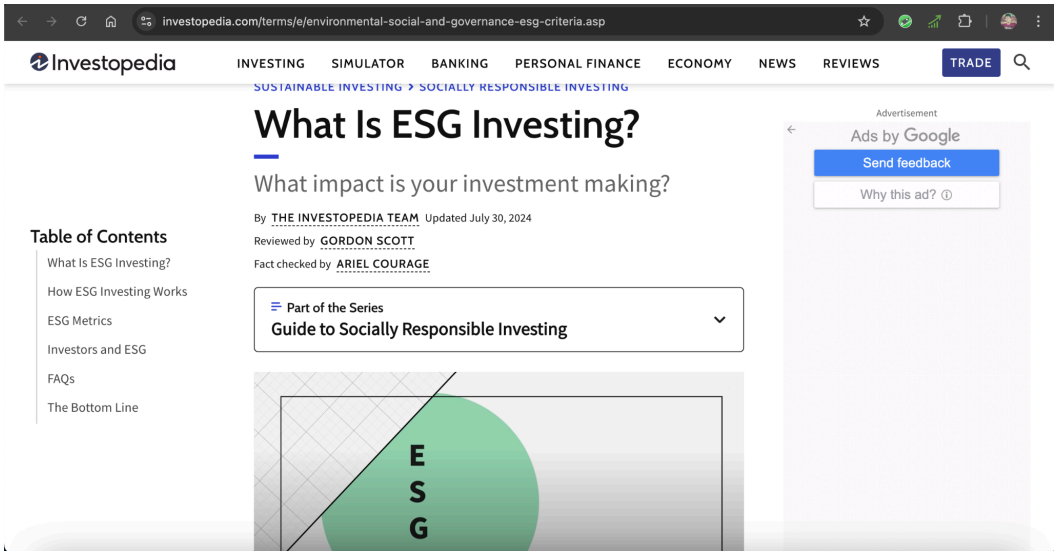
It will come up with a personalized investment plan along with the projected portfolio withdrawals. The generation of investment plan also provides investors, a strategy that couples with the current investment of the client.







The investment advisor can also click on some of the terms mentioned in the plan and open it up in a new window pointing to investopedia.com. He can make use of this to explain some of the investment terms which the client is not aware of. Further the client too can use the platform to better understand both the terminology as well as the investments themselves.



The investment advisor can arrive at the investment strategy with the client and help him to map his needs and risk appetite in order to better improve, compliment and enhance his investment portfolio. He will be rebalancing to meet the necessities of the clients.

Sequence of Return Risk Scenario

Scenario 1: Portfolio Down by 15% for the First Two Years

Case 1: Same Withdrawal Rate During Down Years

Year	Starting Balance	Withdrawals	Ending Balance	Justification
2048	$1,000,000	$54,000	$801,000	15% market decline reduces balance significantly.
2053	$801,000	$59,616	$631,784	Continued withdrawals during market decline.
2058	$631,784	$65,536	$606,248	Market recovery begins, but balance is lower.
2063	$606,248	$71,781	$634,467	Portfolio stabilizes with market recovery.
2068	$634,467	$78,373	$679,234	Balance grows with market recovery.
2073	$679,234	$85,342	$741,292	Continued growth post-recovery.
2078	$741,292	$92,712	$822,292	Portfolio regains strength over time.

Case 2: Reduced Withdrawal Rate During Down Years

Year	Starting Balance	Withdrawals	Ending Balance	Justification

intelvest.us
INVESTING WITH INTELLIGENCE

WORKSPACE

My Portfolios
Holdings, trades & sub-portfolios

AI Insights
Analyse portfolio, retirement & property

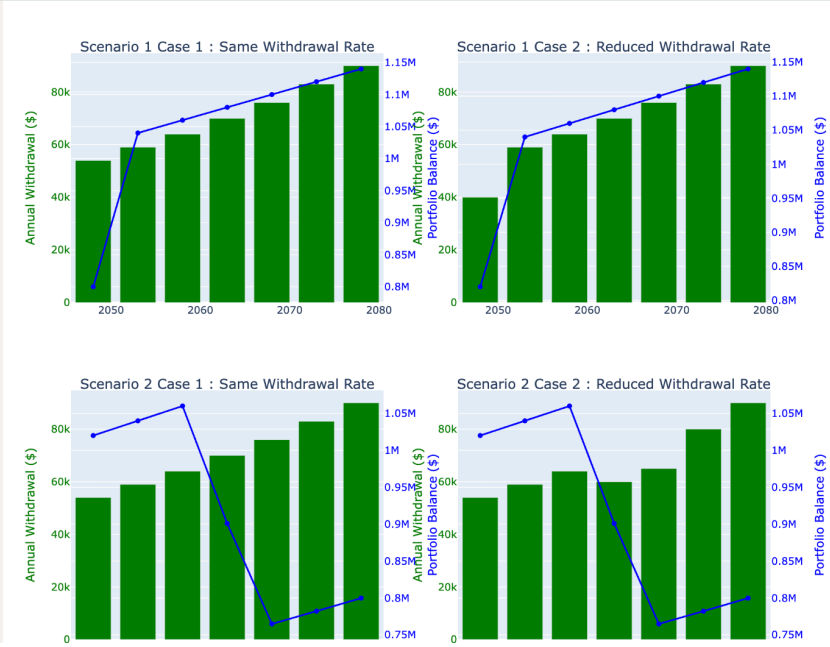
Advisor Workspace
Model portfolios & optimization

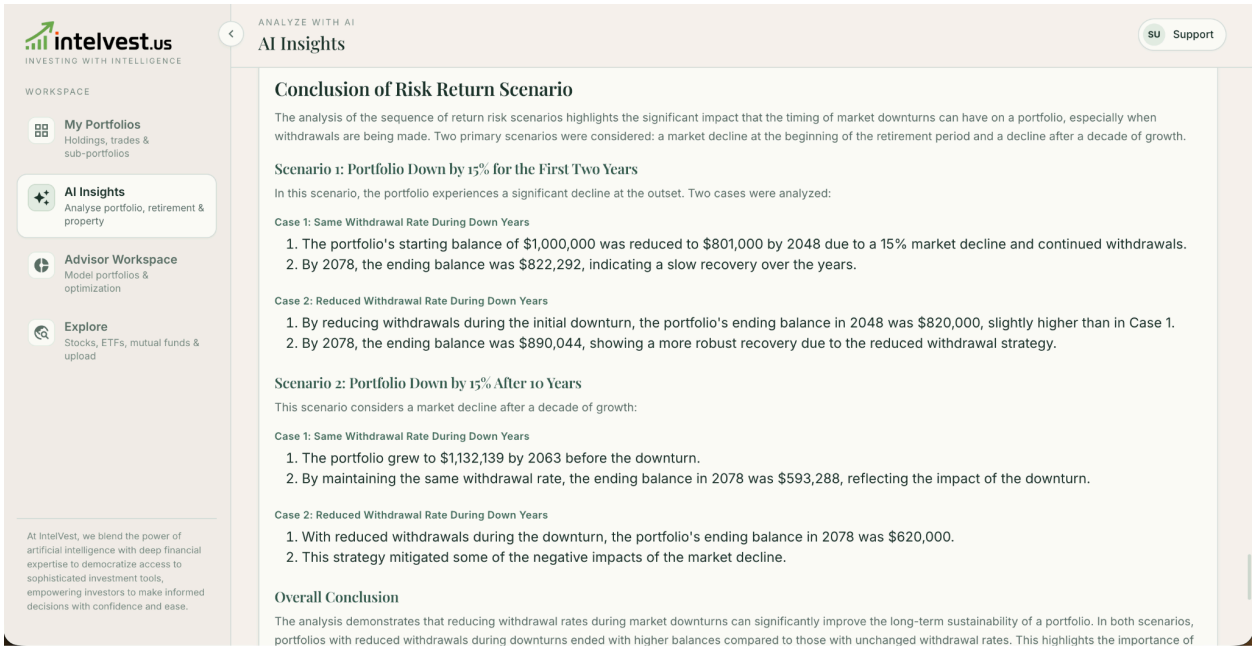
Explore
Stocks, ETFs, mutual funds & upload

At IntelVest, we blend the power of artificial intelligence with deep financial expertise to democratize access to sophisticated investment tools, empowering investors to make informed decisions with confidence and ease.

ANALYZE WITH AI
AI Insights

SU Support

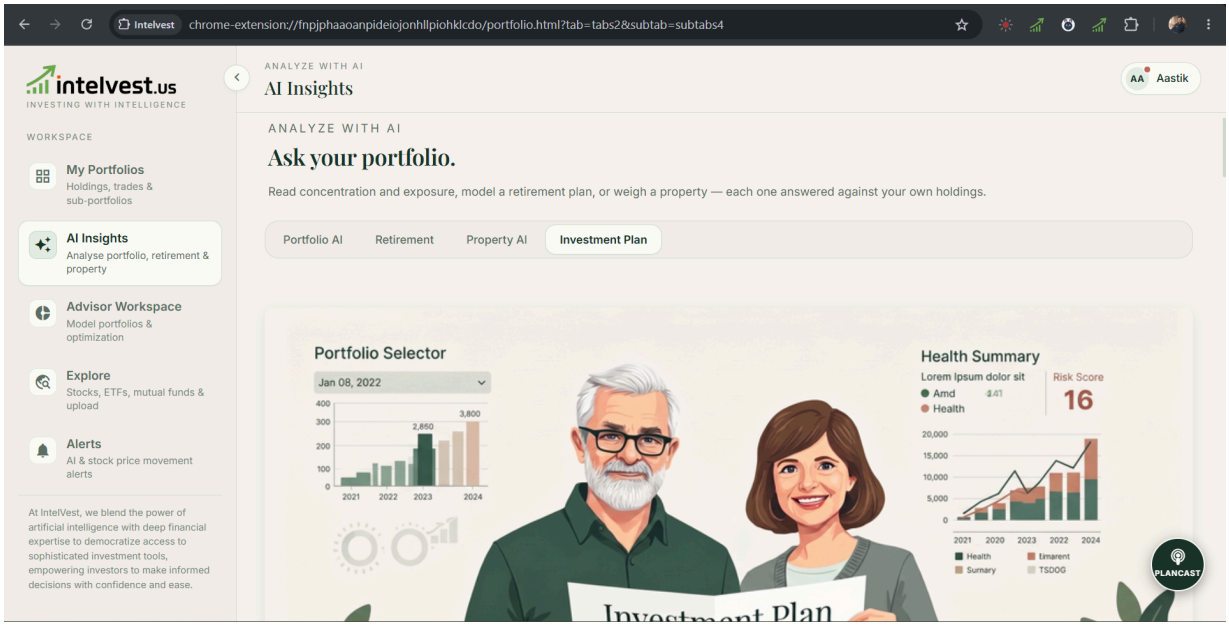




c) Investment Plan:

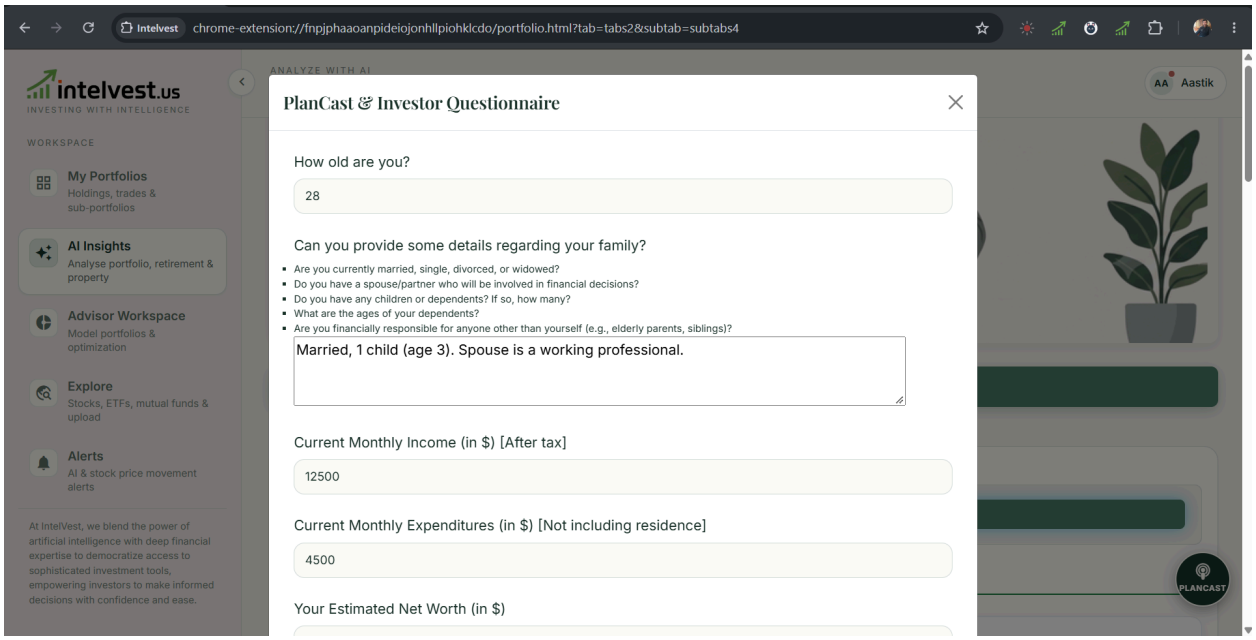
The ability to easily fill out a comprehensive questionnaire and instantly generate a customized investment plan is a powerful tool for both retail investors and Investment Advisors. The transparency and ease of this process make it a highly valuable asset, helping to build client rapport and set a clear roadmap for achieving financial goals.

The form can be completed independently by the investor or collaboratively with an advisor during an online consultation. The Intelvest platform uses this data to establish goals, understand risk tolerance, and lay the foundation for a long-term fiduciary relationship. Leveraging the power of Generative AI, the platform rapidly synthesizes this information to create a holistic, intelligent investment strategy.



To begin, you navigate to the "Investment Plan" tab and open the "PlanCast & Investor Questionnaire". This form is designed to capture a complete picture of your financial life. While you do not need to answer every single detail exhaustively, it covers essential areas such as:

- Basic demographics and family responsibilities.
- Current monthly income, expenditures, and estimated net worth.
- Risk appetite (Conservative, Moderate, or Aggressive) and specific investment goals.
- Existing assets, debts, emergency fund status, and time horizons.
- Tax considerations, thematic preferences (like ESG), and expected retirement dates.



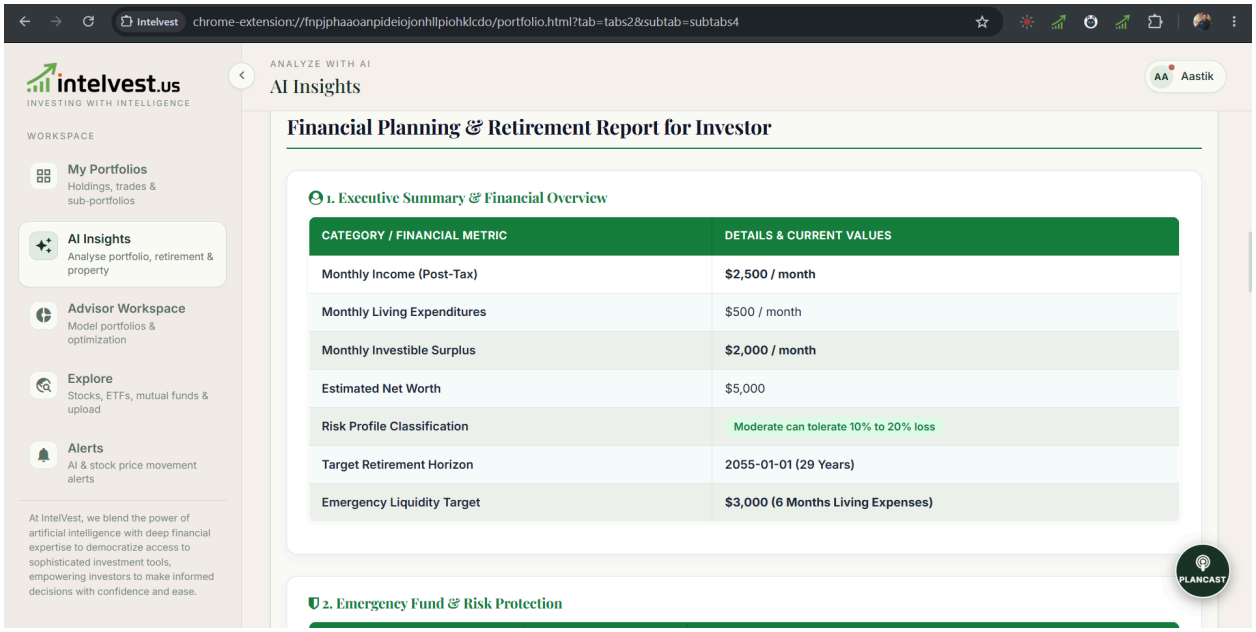
At the end of the questionnaire, investors also have the option to upload their existing portfolio statements in CSV format. This ensures that the generated strategy seamlessly complements and integrates with their current holdings.

Once all the details are filled out and submitted, the platform generates a comprehensive, personalized "Financial Planning Report". This detailed report provides several critical insights:

- **Executive Summary & Financial Overview:** A breakdown of your financial health, highlighting your monthly investible surplus, net worth, risk profile classification, and emergency liquidity targets. It also highlights your biggest financial strengths, risks, and top actionable recommendations.

- **Goal-Based Roadmap & Asset Allocation:** The plan generates a targeted roadmap for your goals and provides a recommended strategic asset allocation (e.g., US Equities, International Equities, Fixed Income, Cash) complete with suggested monthly deployment amounts.

- **Risk & Tax Optimization:** It includes advanced insights like Sequence of Returns Risk Analysis and a Tax Optimization & Account Location Framework to maximize tax-advantaged accounts.

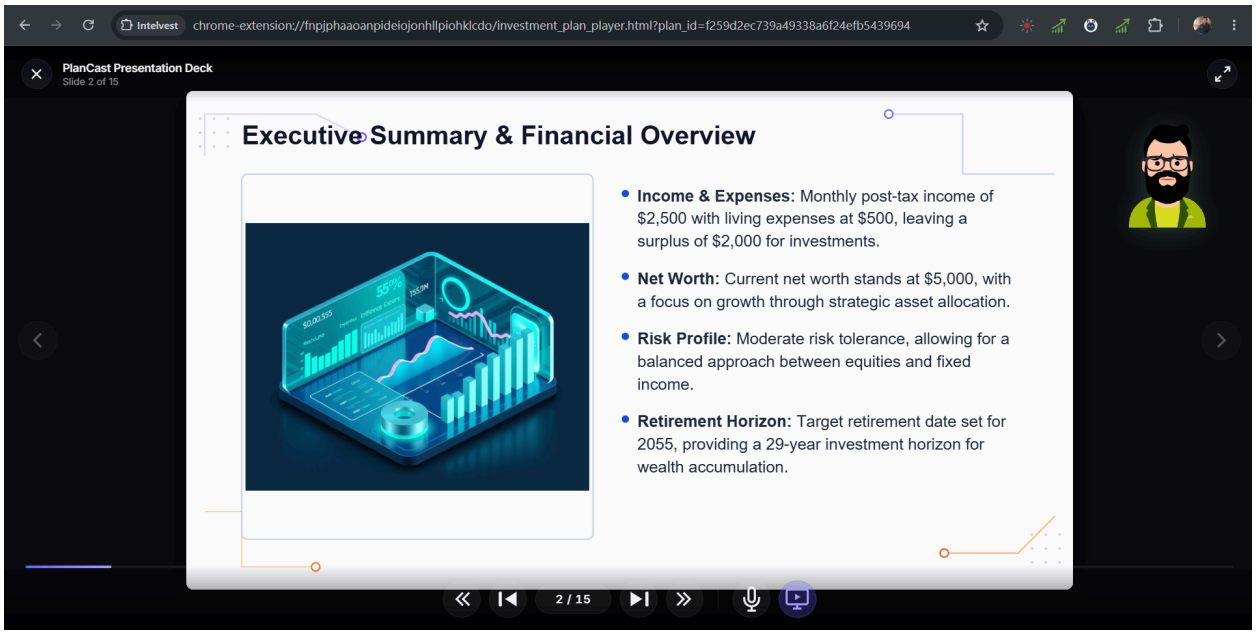


The investment advisor can use this comprehensive strategy to rebalance the portfolio, mapping it precisely to the client's needs and risk appetite.

PlanCast Feature: To make digesting this information even easier, the generated report includes a "PlanCast" button floating at the bottom of the screen. Clicking this button transforms the static report into an interactive, AI-driven presentation deck.

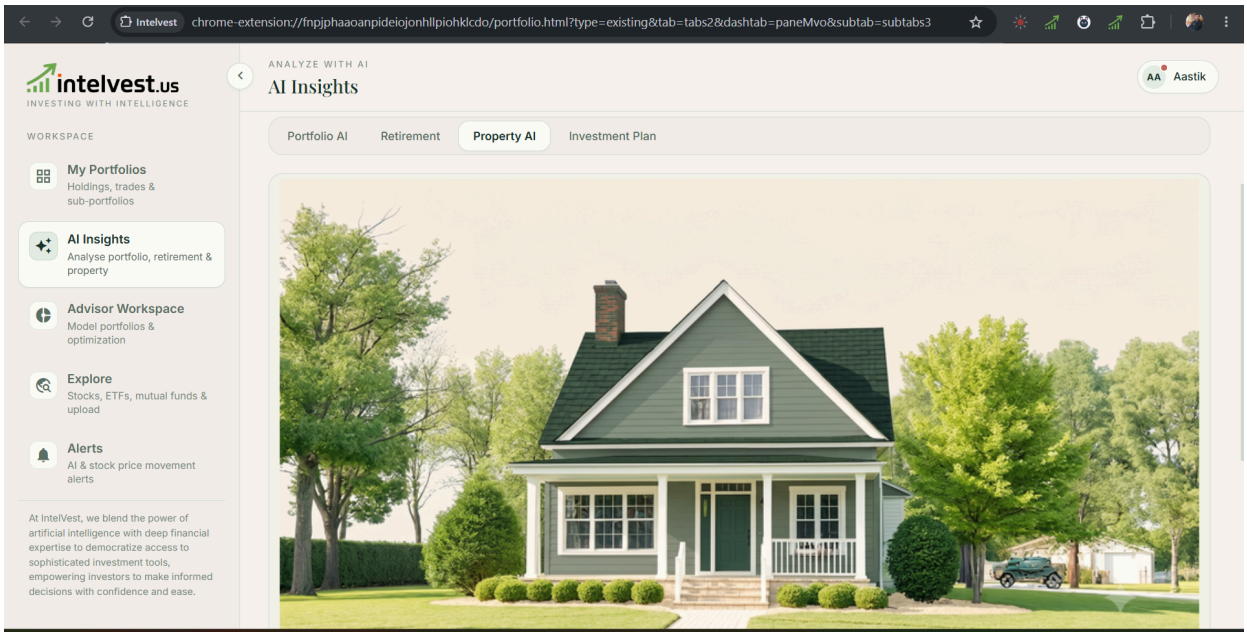
- **Slide Audio & Auto Play:** The PlanCast features a built-in media player. By clicking the play button, an AI voice will narrate the insights and financial overviews presented on each slide. With the auto-play feature, once the audio narration for a specific slide is completed, the presentation will automatically advance to the next slide, offering a smooth, guided tour of your financial plan.

- **PlanCast ChatBot:** Embedded directly alongside the presentation is an interactive AI assistant. If an investor or advisor needs clarification on a specific metric or recommendation on the current slide, they can simply ask the chatbot. You can input questions via text or audio, and the chatbot will simultaneously provide a written answer and an audio narration of that response. You also have full control to pause, play, or resume the audio as needed.

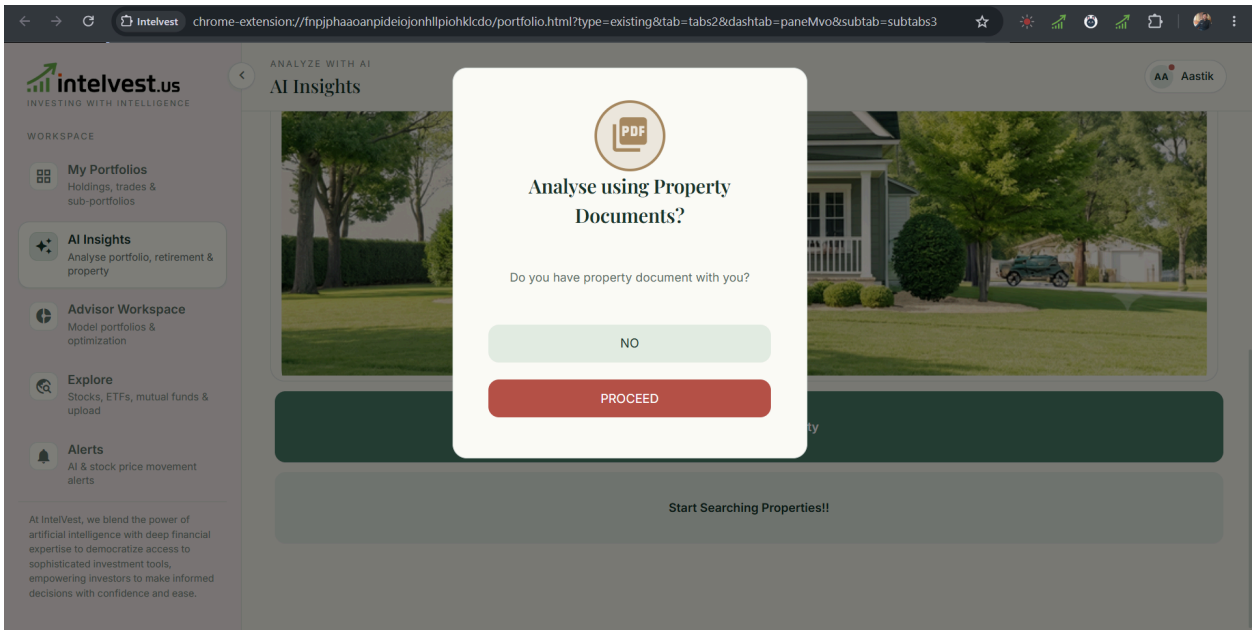


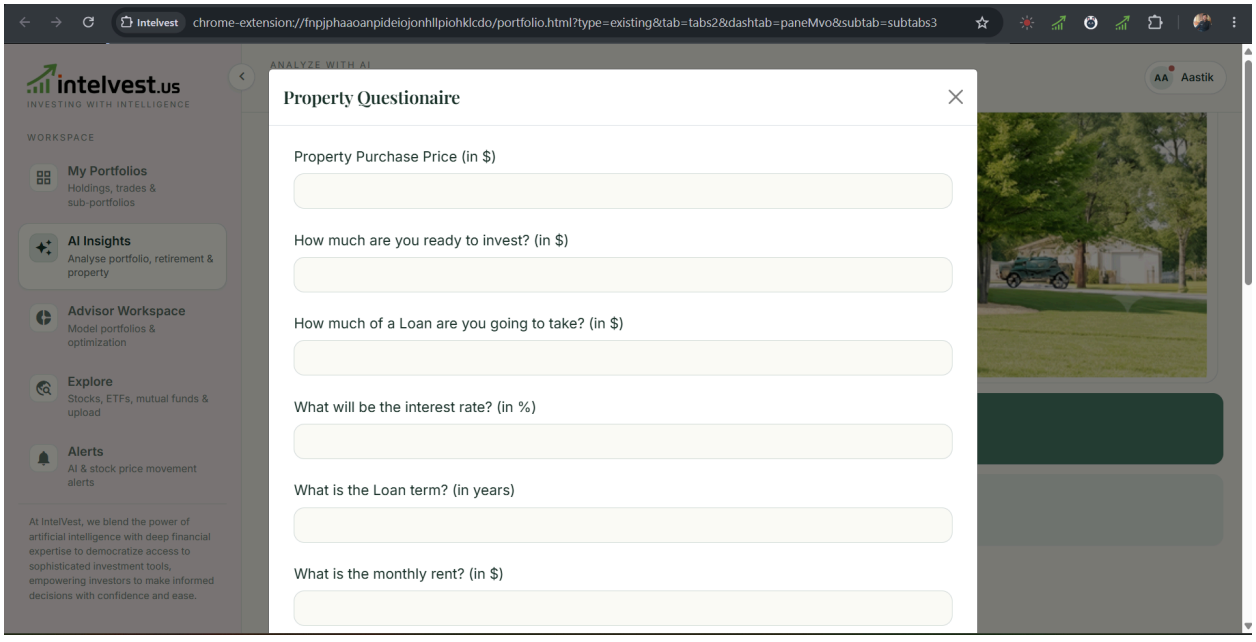
d) Property AI

The **Property AI** module within **AI Insights** brings artificial intelligence to real estate investing, helping users evaluate prospective rental properties and discover new investment opportunities. Upon entering the tab, users are presented with two primary workflows accessible via dedicated action buttons: **Analyze Rental Property** and **Start Searching Properties!!**.



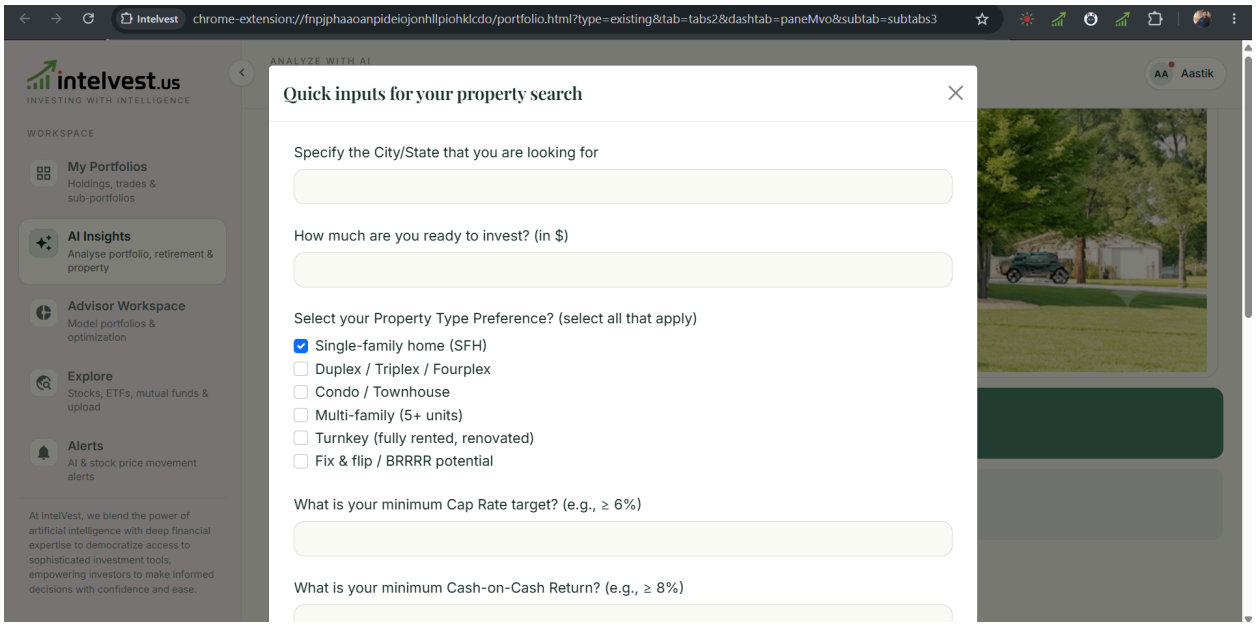
Selecting **Analyze Rental Property** initiates a guided evaluation flow that begins by asking whether the user has existing property documents (such as a PDF listing or financial sheet) available for automated analysis. Regardless of whether a document is uploaded or the user proceeds manually, the system opens a detailed **Property Questionnaire**. Here, users input key financial parameters—including the property purchase price, initial investment amount, loan amount, interest rate, loan term, and expected monthly rent—to generate an AI-driven rental yield and cash flow assessment.





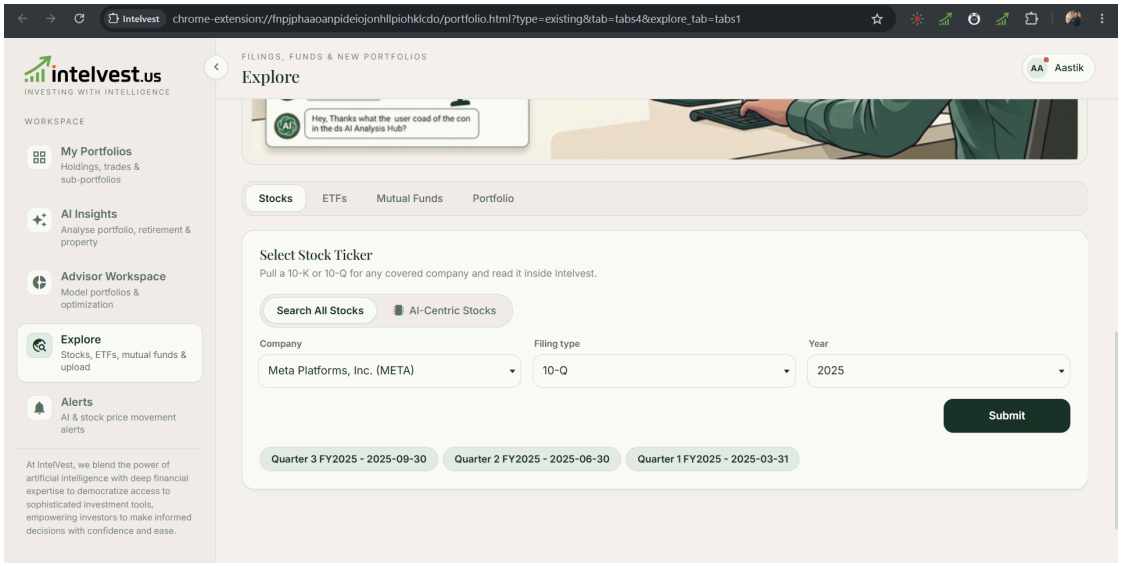
Alternatively, clicking **Start Searching Properties!!** launches a **Quick inputs for your property search** questionnaire designed to source matching real estate deals. Users specify

their target city or state, available investment budget, preferred property types (such as Single-family homes, Multi-family units, Condos, Turnkey properties, or Fix & flip opportunities), and minimum return thresholds including **Cap Rate** and **Cash-on-Cash Return** targets. Once submitted, Property AI filters and surfaces tailored property listings that align with the user's exact financial criteria.



3) Explore

Currently the Intelvest plugin will provide you 4 options in 4 different tabs.



1) **Stocks** : The retail investor or the institutional investor will be able to get more insights over the stocks by asking questions over the 10Qs or 10Ks and making the use of AI to answer them, listening to the earnings call, going through the earnings slides, watching videos from CNBC related to the selected stock, going through the latest news and press releases and finally seeing the visualization from various charts.

2) **ETFs** : The retail investor or the institutional investor will be able to get more insights over the etfs by asking questions over the prospectus and making the use of AI to answer them, going through the annual report, going through the ETF profile, watching videos from CNBC related to the selected etf, going through the latest news and press releases and finally seeing the visualization from various charts.

3) **Mutual Funds** : The retail investor or the institutional investor will be able to get more insights over the mutual funds by asking questions over the prospectus or fund fact sheets and making the use of AI to answer them, going through the annual and semi-annual reports, reading the fund manager's commentary, going through the mutual fund profile, watching videos from CNBC related to the selected mutual fund or its

management team, going through the latest news and press releases and finally seeing the visualization from various charts.

4) **Portfolio** : The retail investor or the institutional investor or the RIA (Registered Investment Advisor) for the retail investor can upload his or their clients portfolio to understand various Risk and Returns metrics via visualization as well as make modifications to their portfolio by buying and selling assets to rebalance the weights as well as create various scenarios from their portfolios and compare them.

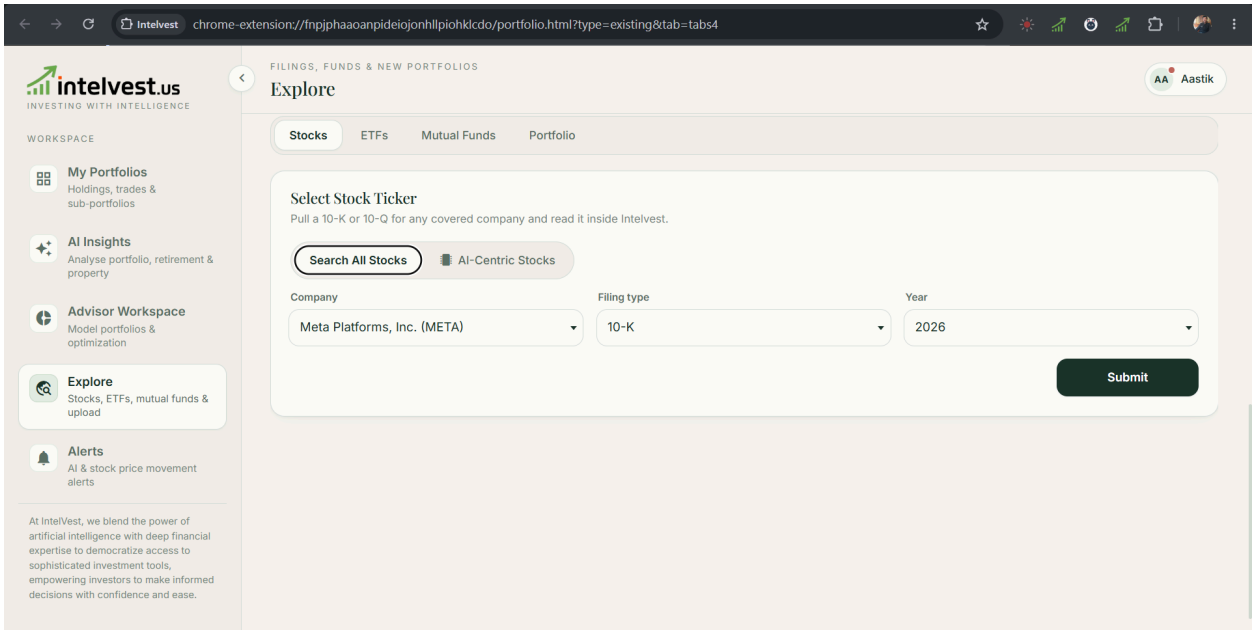
Let us cover the Stocks and the ETFs section first which is mainly for the retail and institutional investors and finally have the Portfolio section covered up for the RIA guiding the retail investors.

1) Stocks

a) Search All Stocks

This mode provides a comprehensive, unfiltered directory of all publicly traded companies covered on the platform, designed for broad market research and direct ticker lookups.

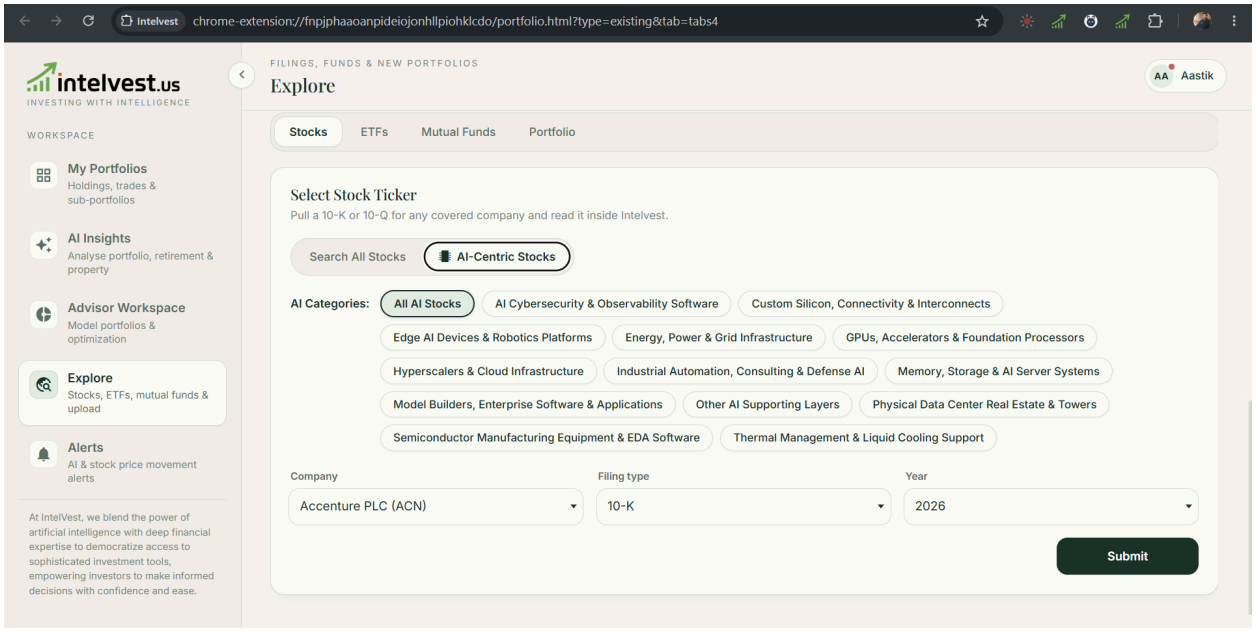
- **Broad Market Coverage:** Accesses the complete database of covered equities across all traditional and modern sectors—including consumer goods, healthcare, financials, and general technology—without thematic restrictions.
- **Streamlined Selection Workflow:** Features a clean interface with three direct dropdown menus (**Company**, **Filing type**, and **Year**), allowing you to quickly pull filings for known entities like Meta Platforms, Inc. (META).
- **Ideal for General Research:** Best suited when you already have a specific company in mind or are evaluating diversified portfolios outside of the AI sector.



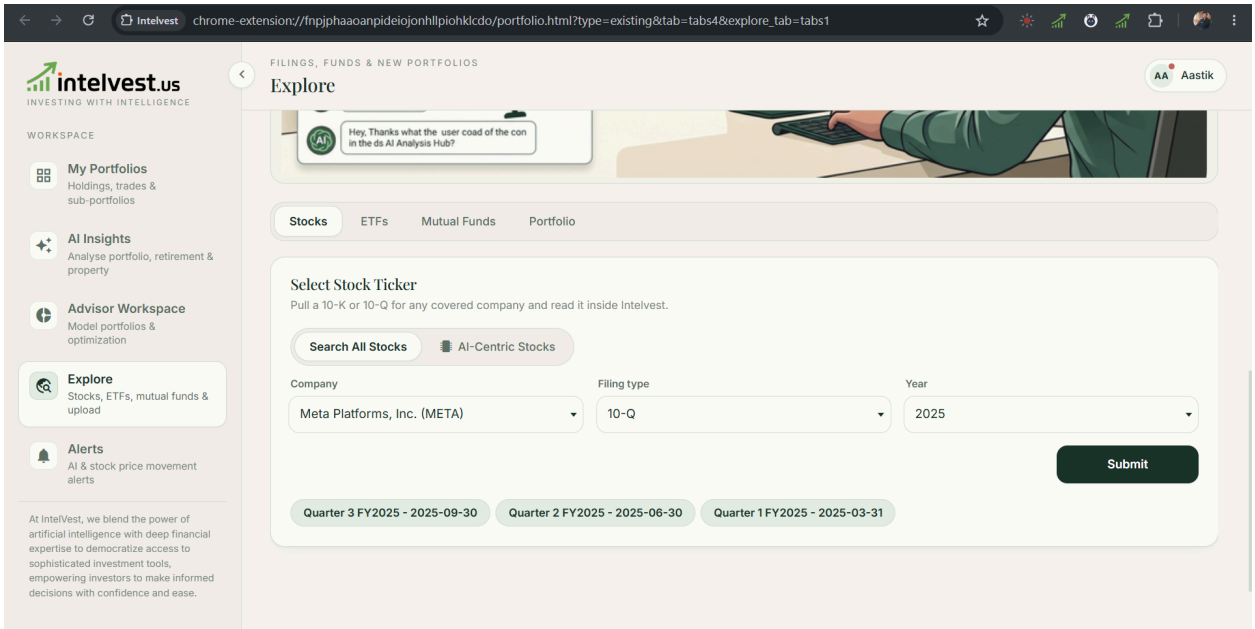
b) AI-Centric Stocks

This specialized mode curates companies directly involved in building, powering, or supporting artificial intelligence, organizing them into granular industry sub-sectors.

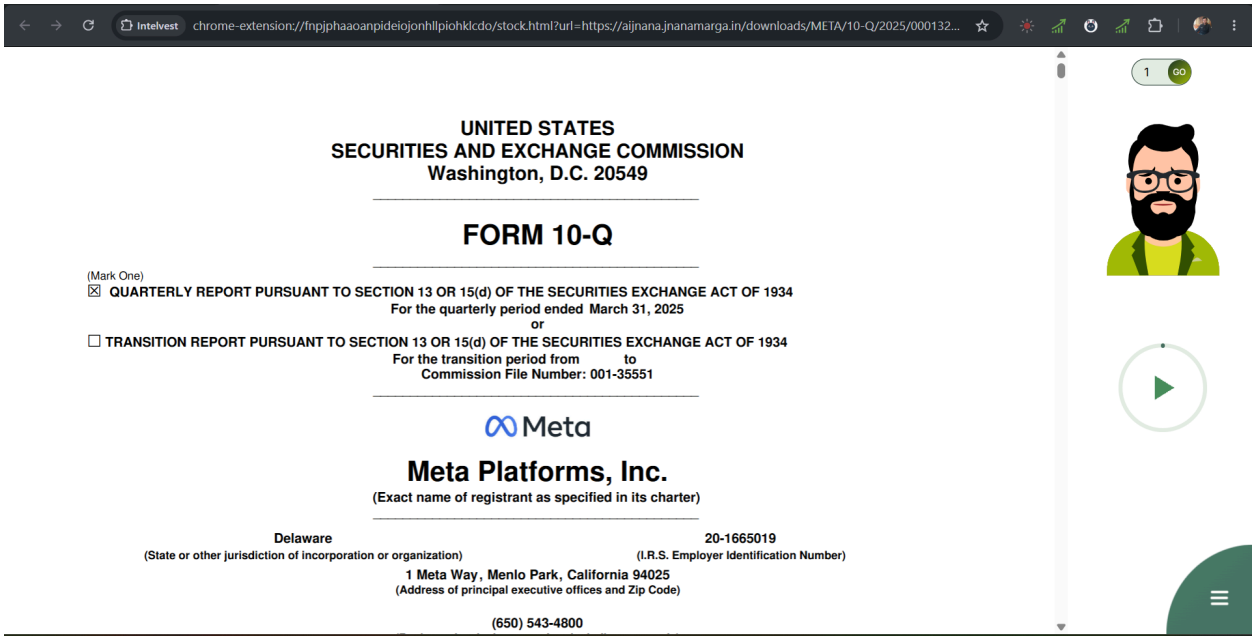
- **Thematic Filtering Across 14 AI Categories:** Automatically narrows the company dropdown based on specific layers of the AI stack, including:
    - *Hardware & Compute:* GPUs, Accelerators & Foundation Processors; Custom Silicon, Connectivity & Interconnects; Memory, Storage & AI Server Systems; Edge AI Devices & Robotics Platforms; Semiconductor Manufacturing Equipment & EDA Software.
    - *Infrastructure & Power:* Hyperscalers & Cloud Infrastructure; Physical Data Center Real Estate & Towers; Energy, Power & Grid Infrastructure; Thermal Management & Liquid Cooling Support.
    - *Software & Applications:* Model Builders, Enterprise Software & Applications; AI Cybersecurity & Observability Software; Industrial Automation, Consulting & Defense AI; Other AI Supporting Layers (plus an **All AI Stocks** view).
- **Targeted Value-Chain Discovery:** Enables investors to compare competitors within a single niche (such as liquid cooling or grid infrastructure) and pull relevant filings (e.g., Accenture PLC under AI categories) without manually sifting through the broader market.



To get more information related to a particular stock, first select the ticker symbol, followed by the form i.e. either 10Q or the 10K and finally the year. Click on the “Submit” button.



You will get the selected fillings for each quarter. Select the quarter you want to go with by clicking on it. This will open up the filling pdf in the new tab.



The PDF filing would open up in the browser plugin. Within the plugin you will see the avatar with whom you can ask the questions over the selected 10Q or 10K, the earnings call and the menu list. On clicking the hamburger icon the menu list will open up.

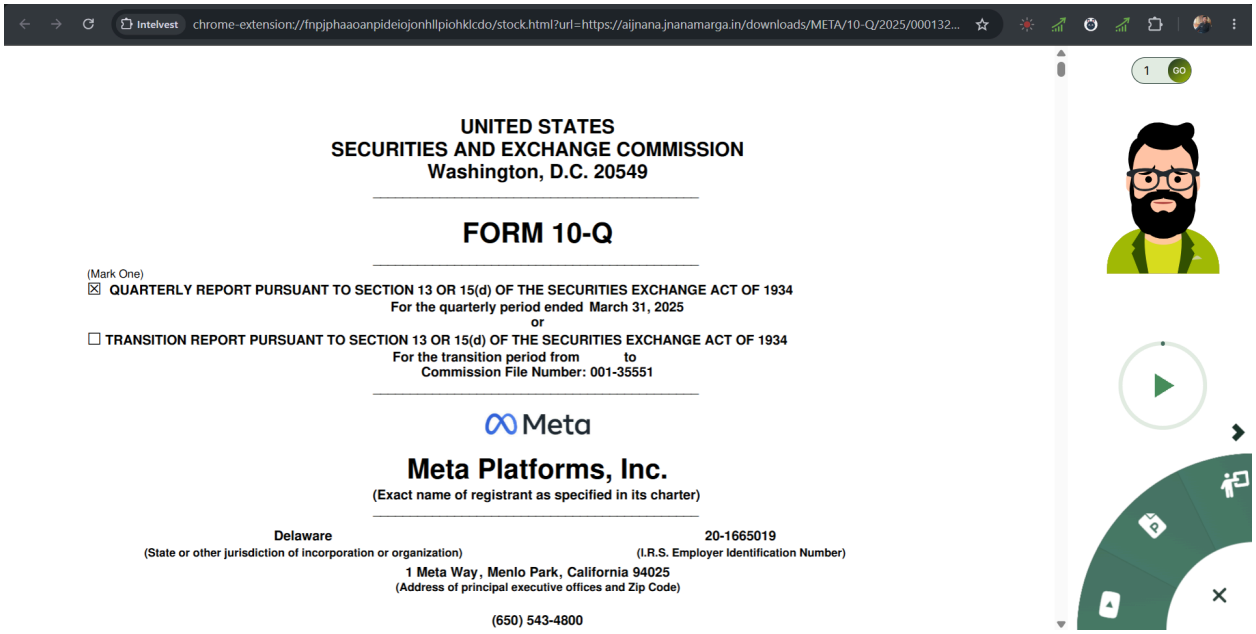
Feature Set.

a) Talking Avatar

Click on the avatar and ask any question related to the filing opened. Based on the content provided in the PDF filing, you will get the answer.

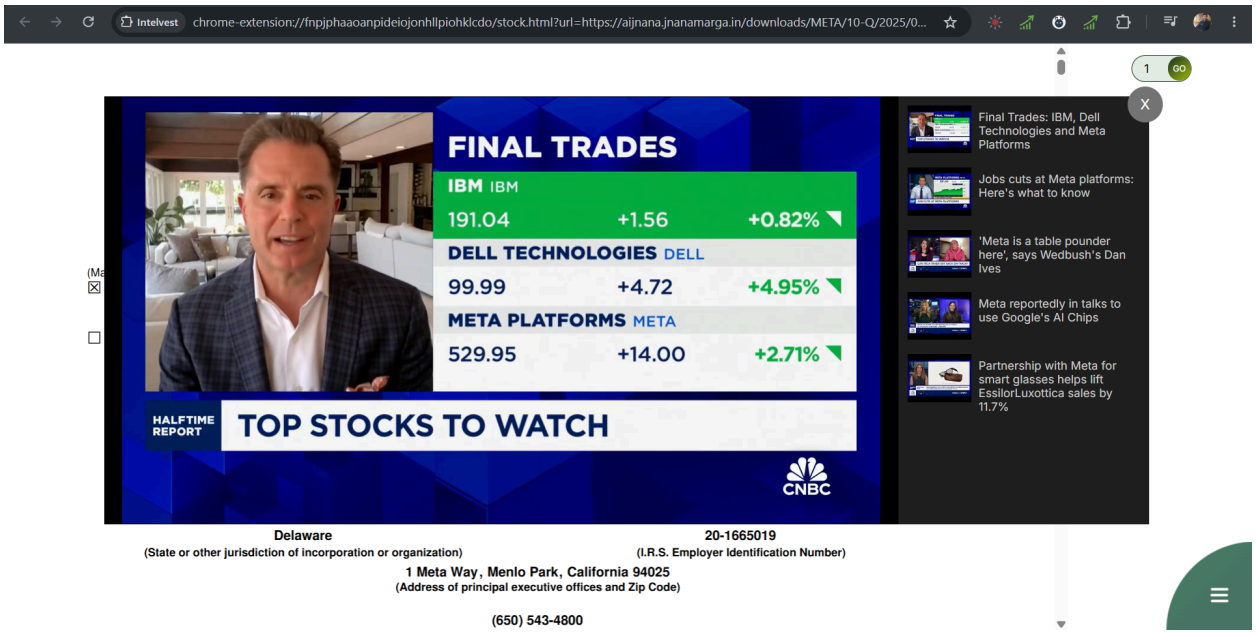
b) Earnings Call

Click on the play button to listen to the earnings call that happened for the quarter.
On clicking the hamburger icon, you will get more items. Hovering on each of the items will tell you what exactly it's meant for.



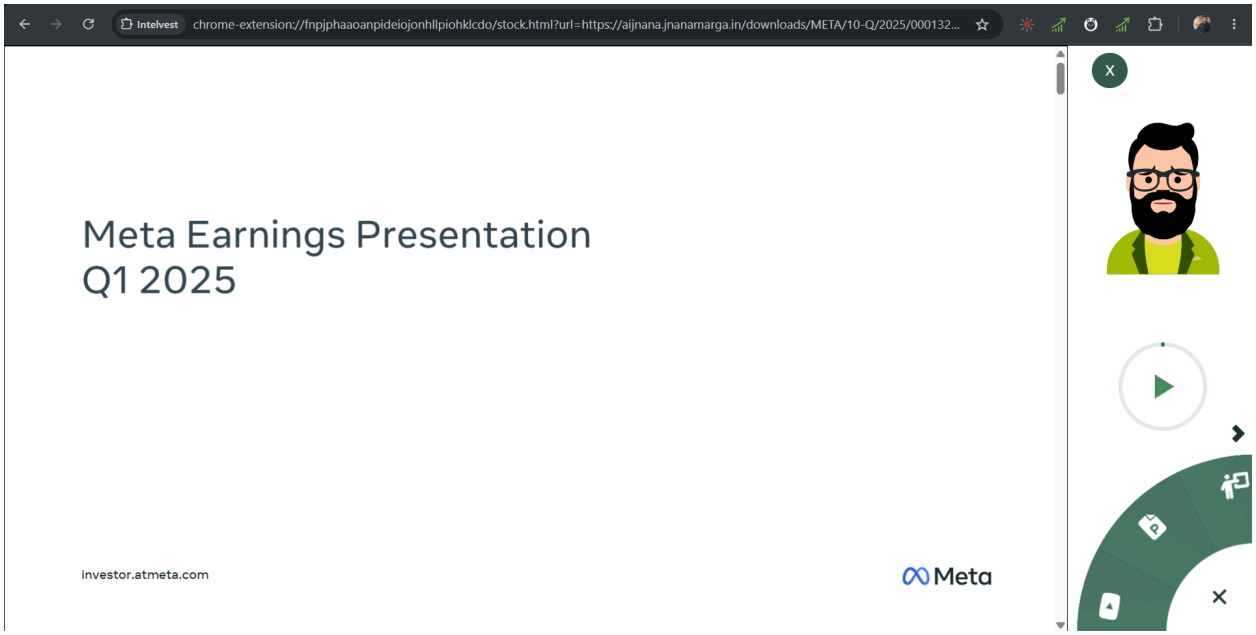
c) Videos related to the stocks

The first item within the menu that you see is the videos related to the stock selected. Click on it and you will see the below window.



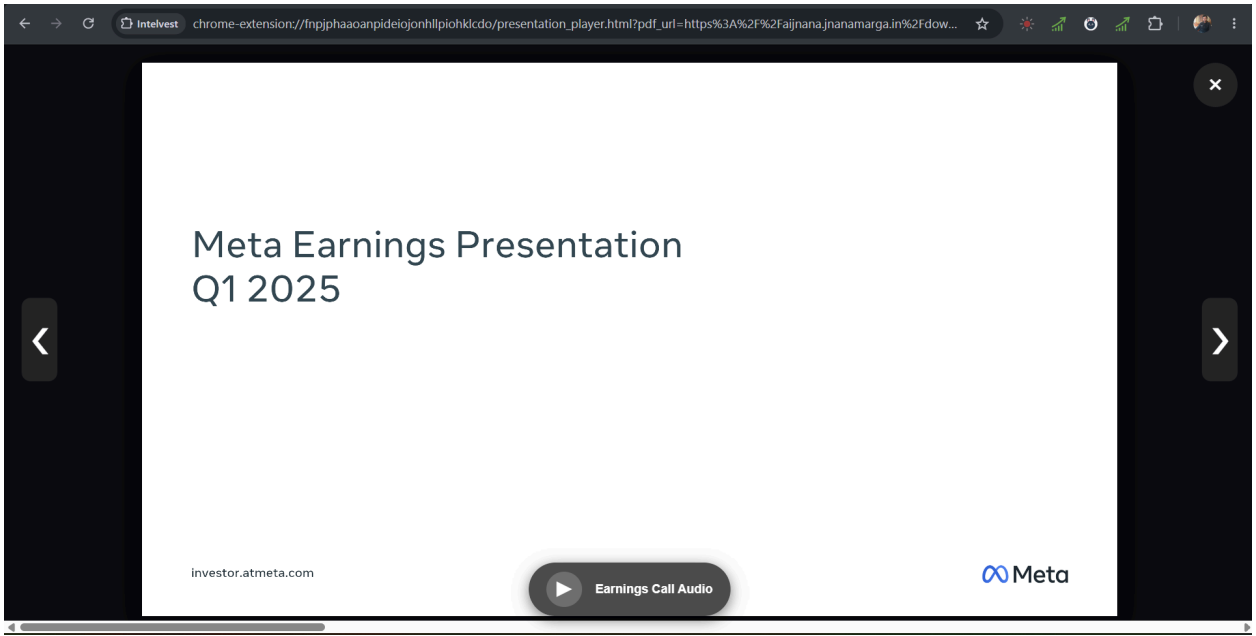
d) Earning Slides

The second item within the menu list is for the earning slides. On clicking it you will get the earning slides released by the company for that quarter.



e) Presentation (Official Slidecast)

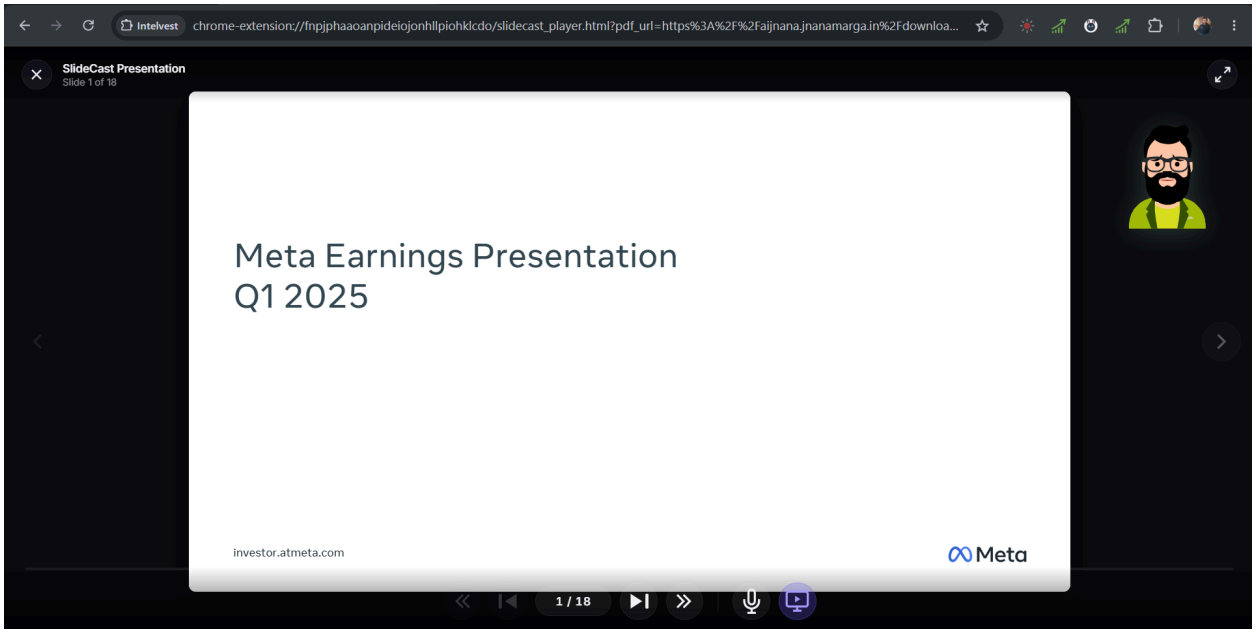
The third item within the menu list is for the Presentation. On clicking it you will get the presentation release made by the company for that quarter.



Make use of the arrow pointing towards the right to see the next set of items within the menu.

f) SlideCast: (Generated Slidecast)

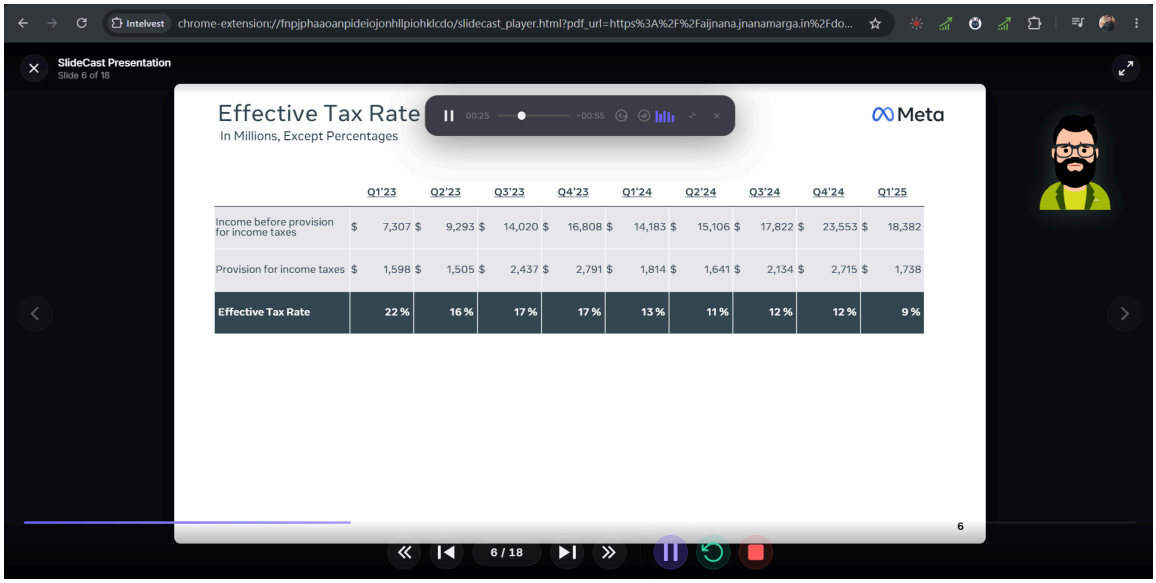
The fourth item within the menu list is for the SlideCast. On clicking it you will get the presentation made by us along with auto play and chatbot features.



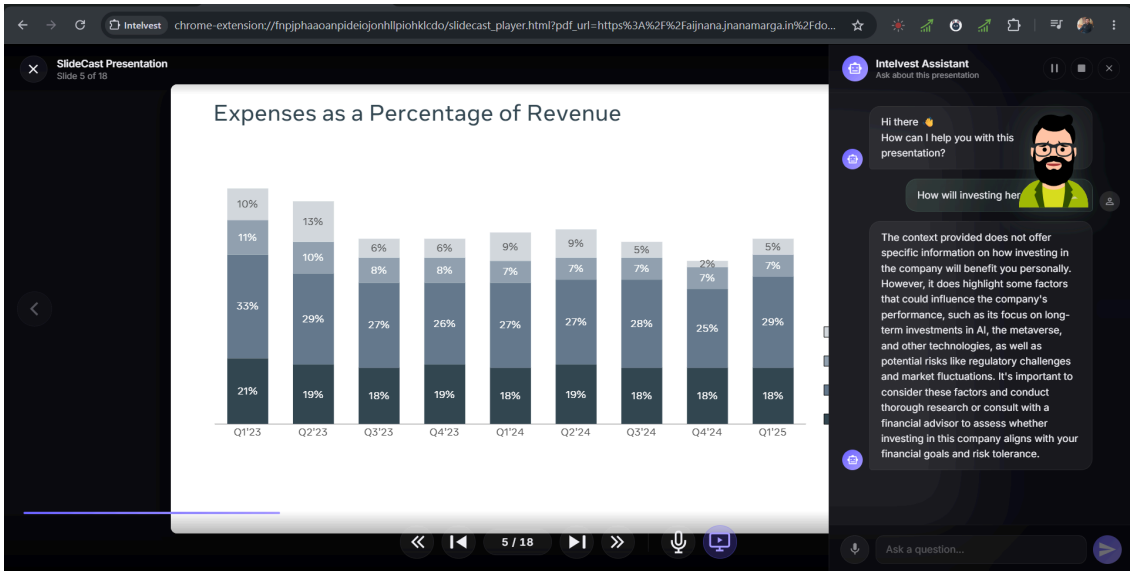
- **Slide Audio:** The SlideCast features a built-in play button that brings presentations to life with accompanying audio. By clicking it, users can listen to voice narrations or access additional information relevant to the current slide. The interface also includes skip buttons, allowing for easy and precise navigation through the slide's media.



- **Auto Play Slides:** For a seamless viewing experience, the Auto Play feature allows the presentation to progress entirely on its own. Once the audio narration for a specific slide is completed, the system will automatically shift to the next slide. This ensures a smooth, hands-free flow of information from the beginning of the presentation to the end.

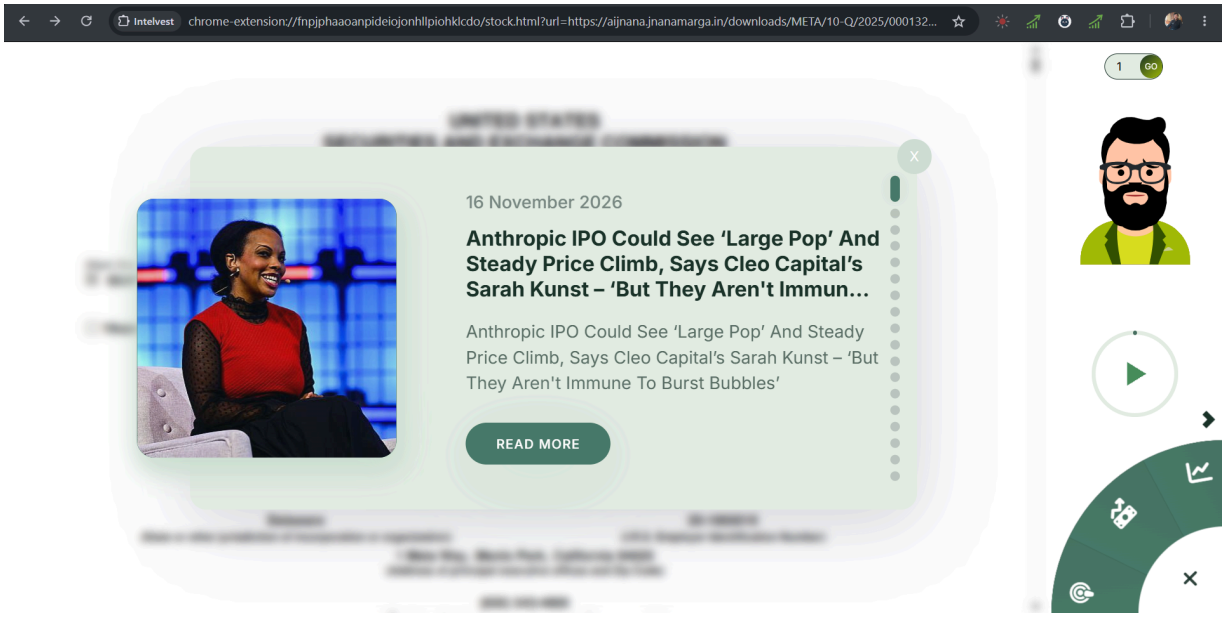


- **Slidecast Chatbot:** Embedded directly within the presentation is an interactive Chatbot designed to answer your questions in real time. Users can submit questions about the current slide or presentation using either typed text or voice audio input. In response, the chatbot simultaneously provides a written textual answer and an audio narration of that same answer. Additionally, users have complete control over the chatbot's audio output with convenient pause, play, and resume options.



g) News and RAG over it

The fifth item within the menu list is for the News. On clicking on it, you will get the latest news over the stocks. If you do not want to read the entire news article, you can ask the Avatar questions related to the news based on title and description.



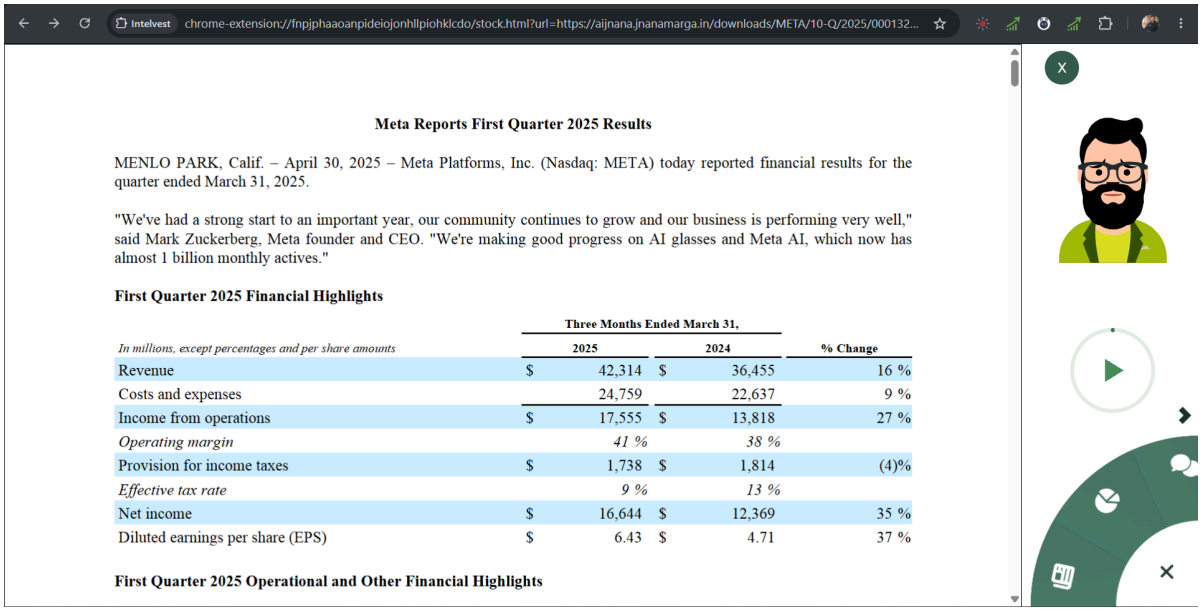
h) Charts

The sixth item within the menu list is for the Charts. On clicking on it, you will get various visualizations for different financial attributes. These charts can also be compared with different stocks or indices.



i) Press Releases

The seventh item within the menu list is for the press releases. On clicking it you will get the press release made by the company for that quarter.



Meta Reports First Quarter 2025 Results

MENLO PARK, Calif. – April 30, 2025 – Meta Platforms, Inc. (Nasdaq: META) today reported financial results for the quarter ended March 31, 2025.

"We've had a strong start to an important year, our community continues to grow and our business is performing very well," said Mark Zuckerberg, Meta founder and CEO. "We're making good progress on AI glasses and Meta AI, which now has almost 1 billion monthly actives."

First Quarter 2025 Financial Highlights

	Three Months Ended March 31,		
In millions, except percentages and per share amounts	**2025**	**2024**	**% Change**
Revenue	$ 42,314	$ 36,455	16 %
Costs and expenses	24,759	22,637	9 %
Income from operations	$ 17,555	$ 13,818	27 %
Operating margin	*41 %*	*38 %*	
Provision for income taxes	$ 1,738	$ 1,814	(4)%
Effective tax rate	*9 %*	*13 %*	
Net income	$ 16,644	$ 12,369	35 %
Diluted earnings per share (EPS)	$ 6.43	$ 4.71	37 %

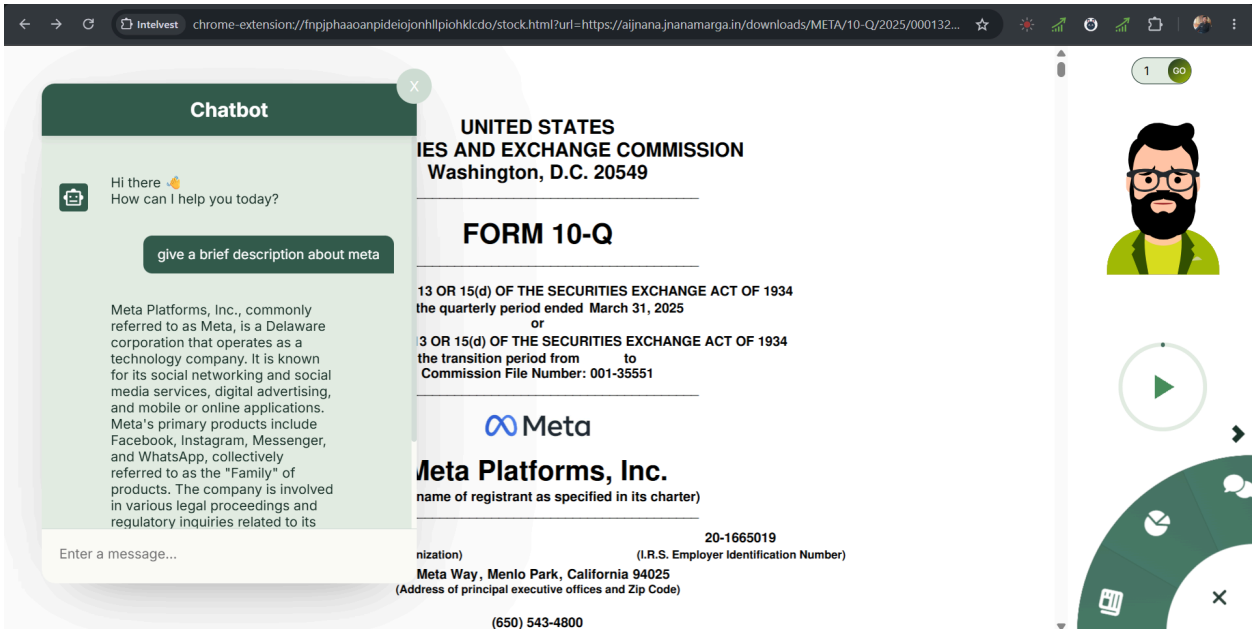
First Quarter 2025 Operational and Other Financial Highlights

j) Sentiment Analysis

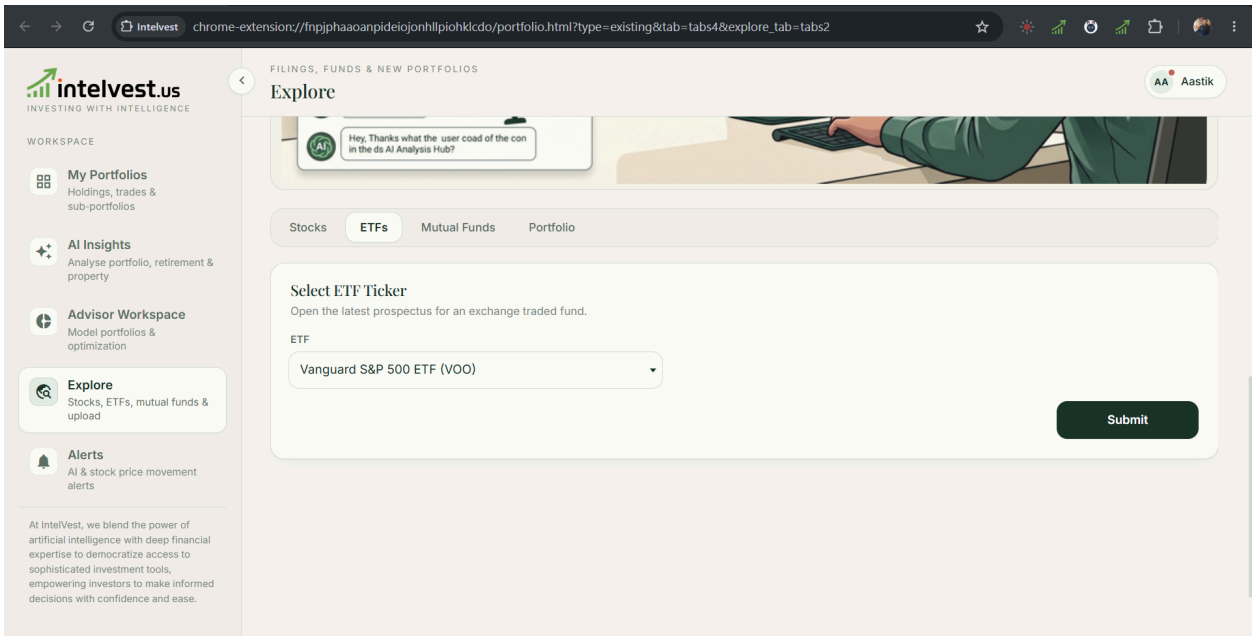
The eighth item within the menu list is for sentiment analysis. On clicking on it, you will get the opinion whether to buy or sell the stock from the posts of the reddit users as well as the approx pricing forecast of the stock predicted using ML.



k)Chatbot: The ninth item within the menu list is for the chatbot. If you are not comfortable asking questions to the avatar, you can make use of the chatbot to type in the questions and get the answers from the AI.



2) ETFs



To get more information related to a particular ETF, select the ticker symbol and click on the “Submit” button.

This will open up the prospectus pdf of the ETF in a new tab.

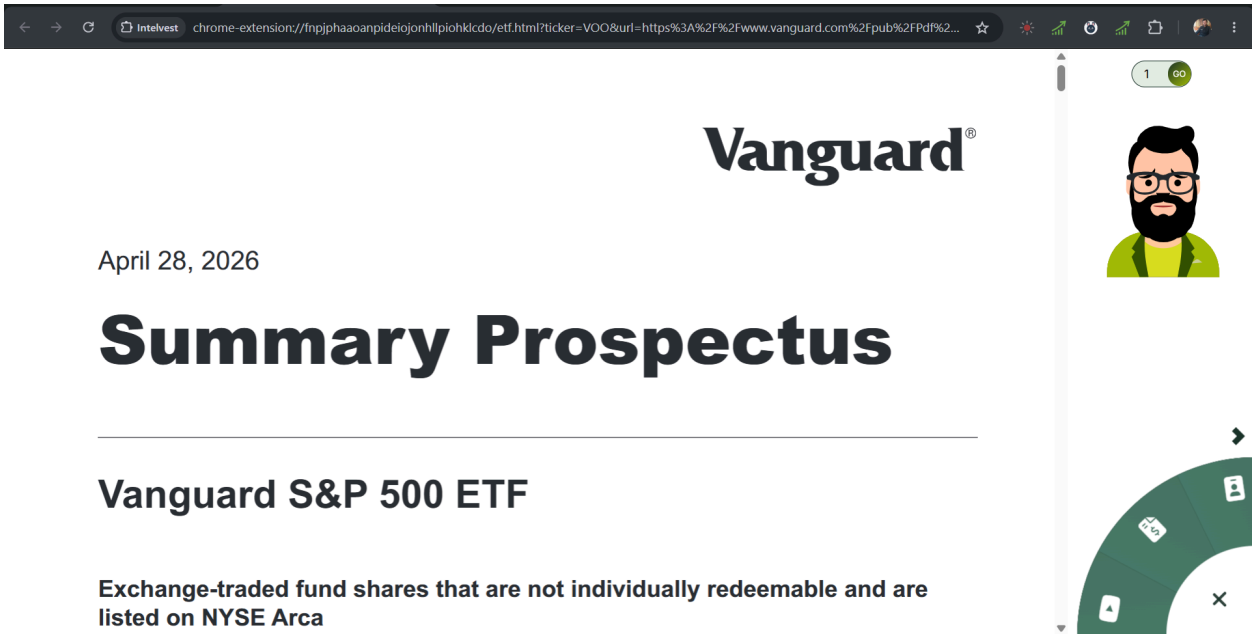


The ETF prospectus would open up in the browser plugin. Within the plugin you will see the avatar with whom you can ask the questions over the prospectus and the menu list. On clicking the hamburger icon the menu list will open up.

Feature Set.

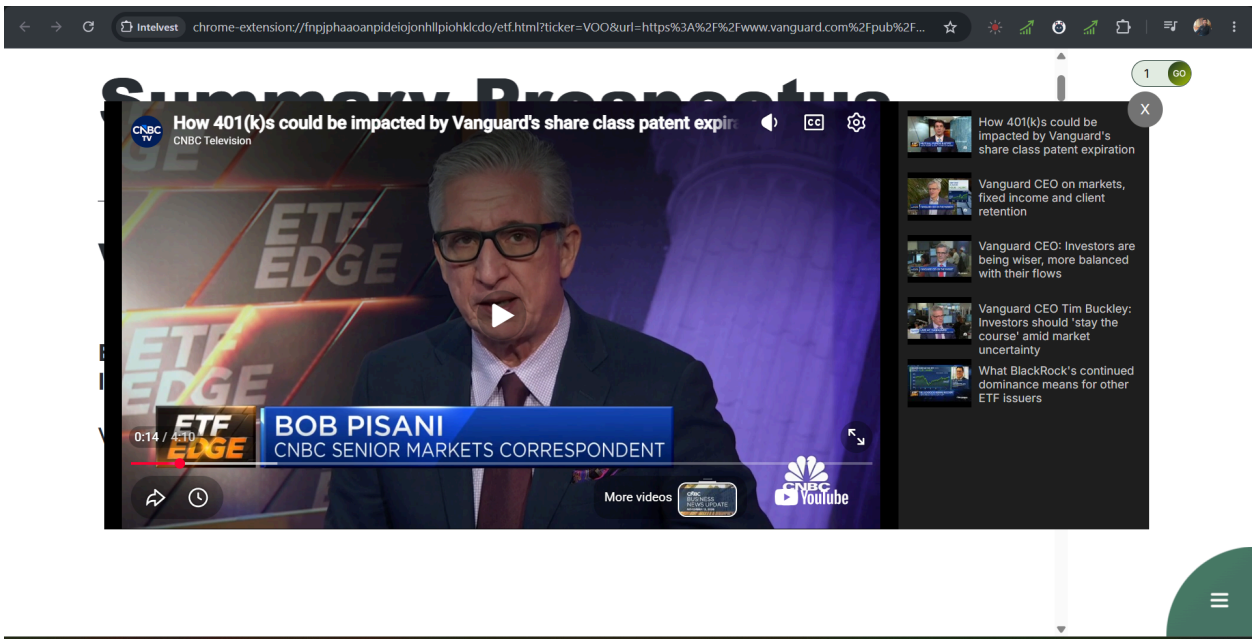
a) Talking Avatar
Click on the avatar and ask any question related to the prospectus opened. Based on the content of the prospectus, you will get the answer.

On clicking the hamburger icon, you will get more items. Hovering on each of the items will tell you what exactly its meant for.



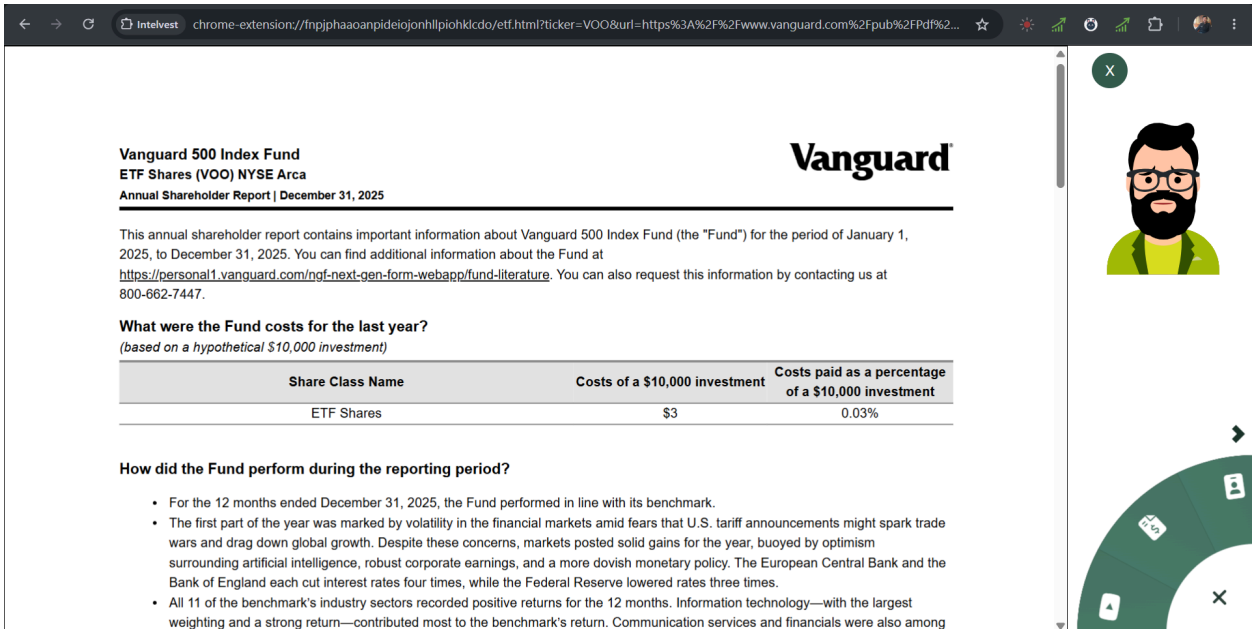
b) Videos related to the ETFs

The first item within the menu that you see is the videos related to the ETF selected. Click on it and you will see the below window.



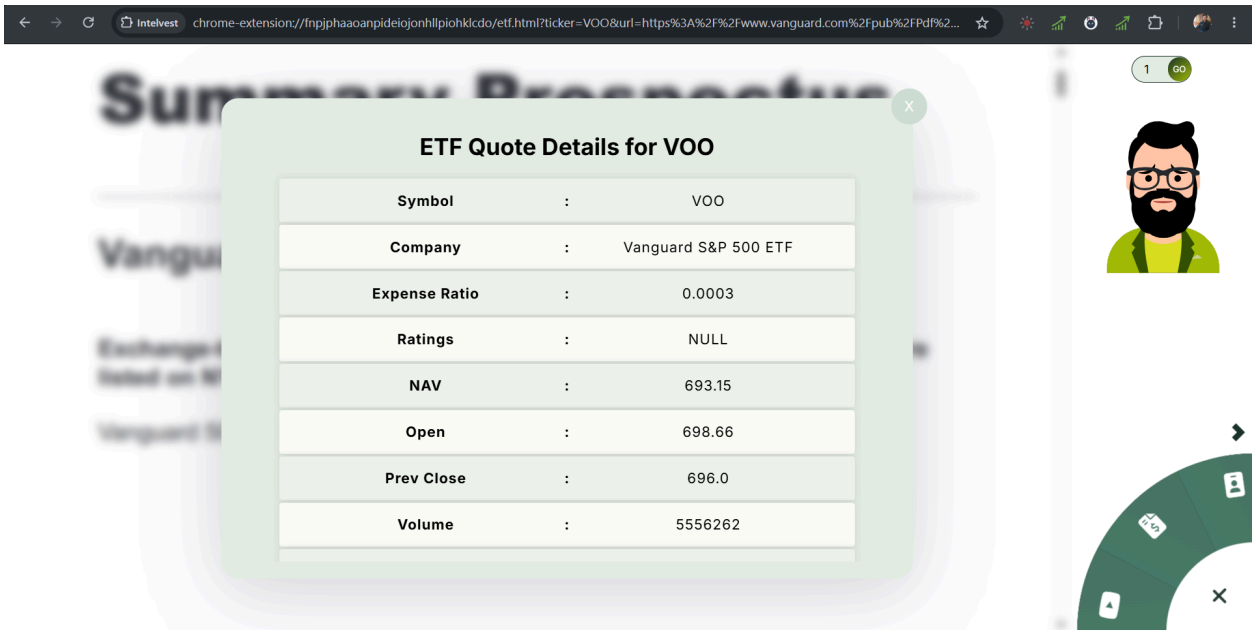
c) Annual Report

The second item within the menu list is for the annual report. On clicking it you will get the annual report for that particular ETF..



d) ETF Profile

The third item within the menu list is for the profile. On clicking it you will get the ETF quote details.



Make use of the arrow pointing towards the right to see the next set of items within the menu.

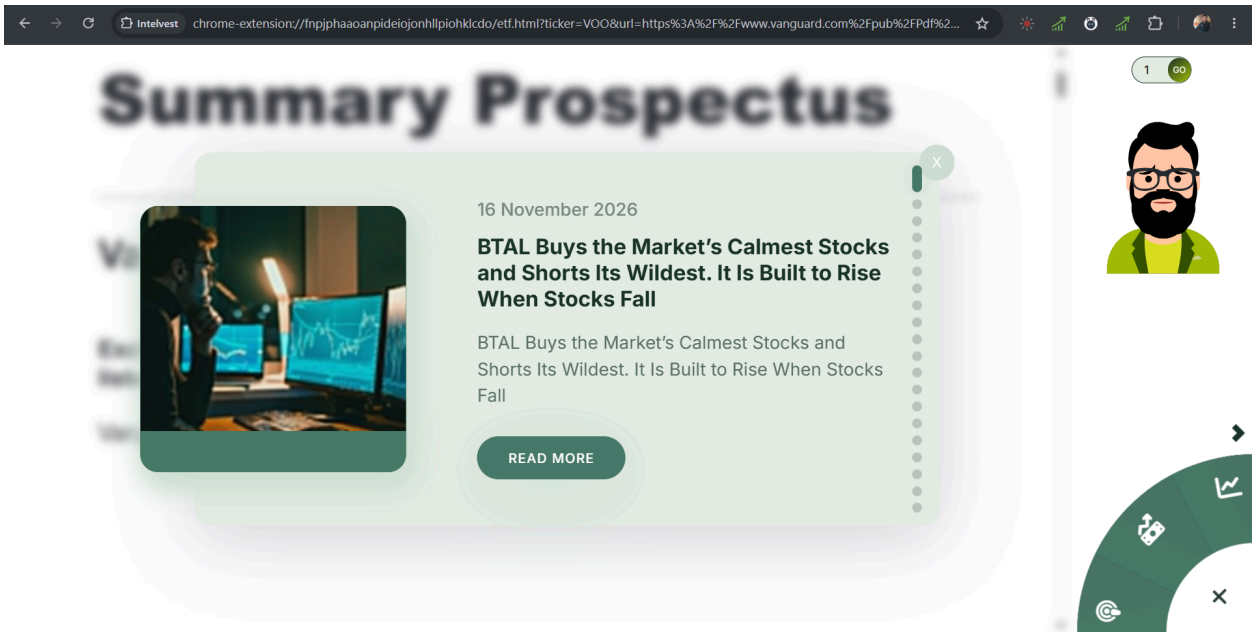
e) SlideCast:

The fourth item within the menu list is for the SlideCast. On clicking it you will get the presentation made by us along with auto play and chatbot feature.



f) News and RAG over it

The fifth item within the menu list is for the News. On clicking on it, you will get the latest news over the ETF. If you do not want to read the entire news article, you can ask the Avatar questions related to the news based on title and description.



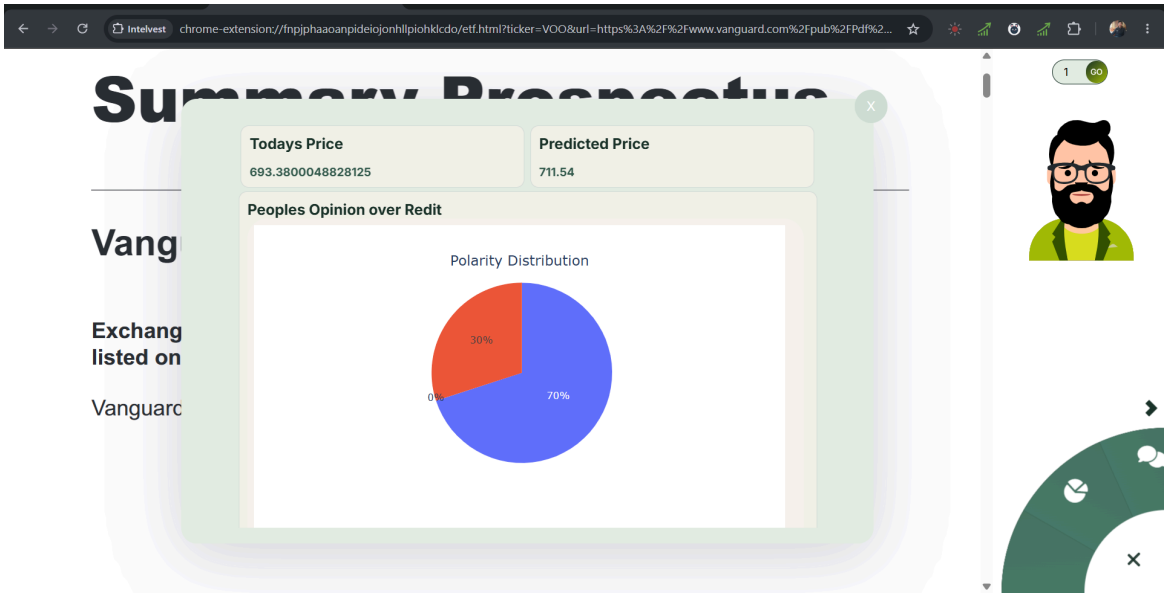
g) Charts

The sixth item within the menu list is for the Charts. On clicking on it, you will get various visualizations for different financial attributes. These charts can also be compared with different ETFs or indices.



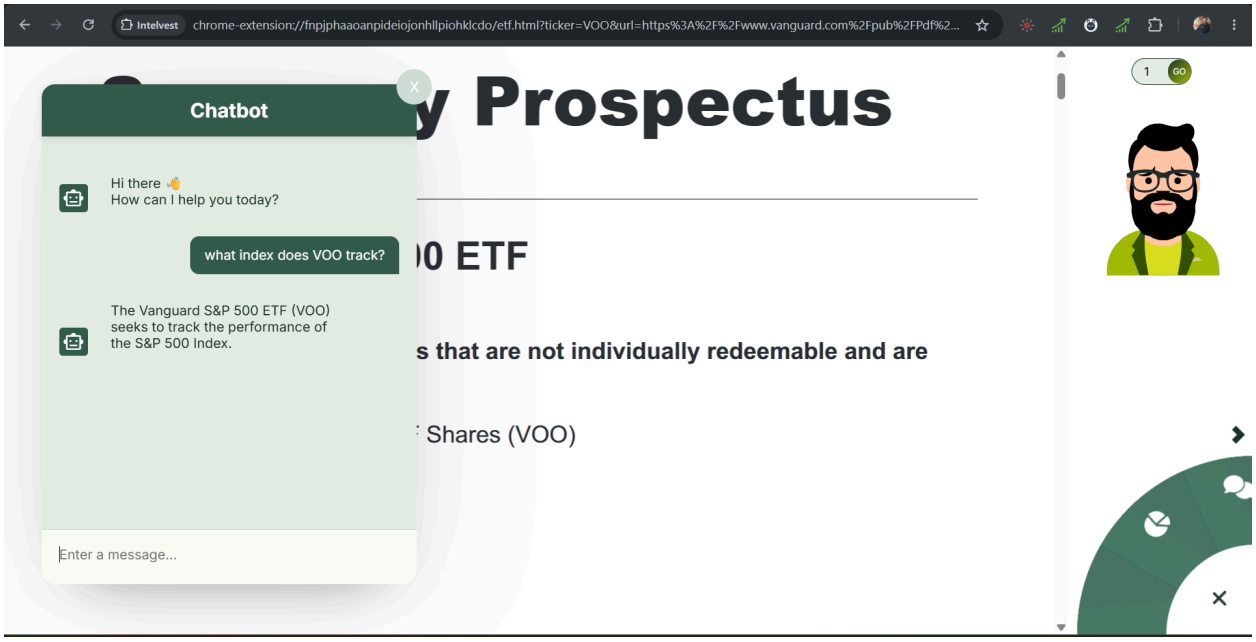
h) Sentiment Analysis

The seventh item within the menu list is for sentiment analysis. On clicking on it, you will get the opinion whether to buy or sell the ETF from the posts of the reddit users as well as the approx pricing forecast of the stock predicted using ML.



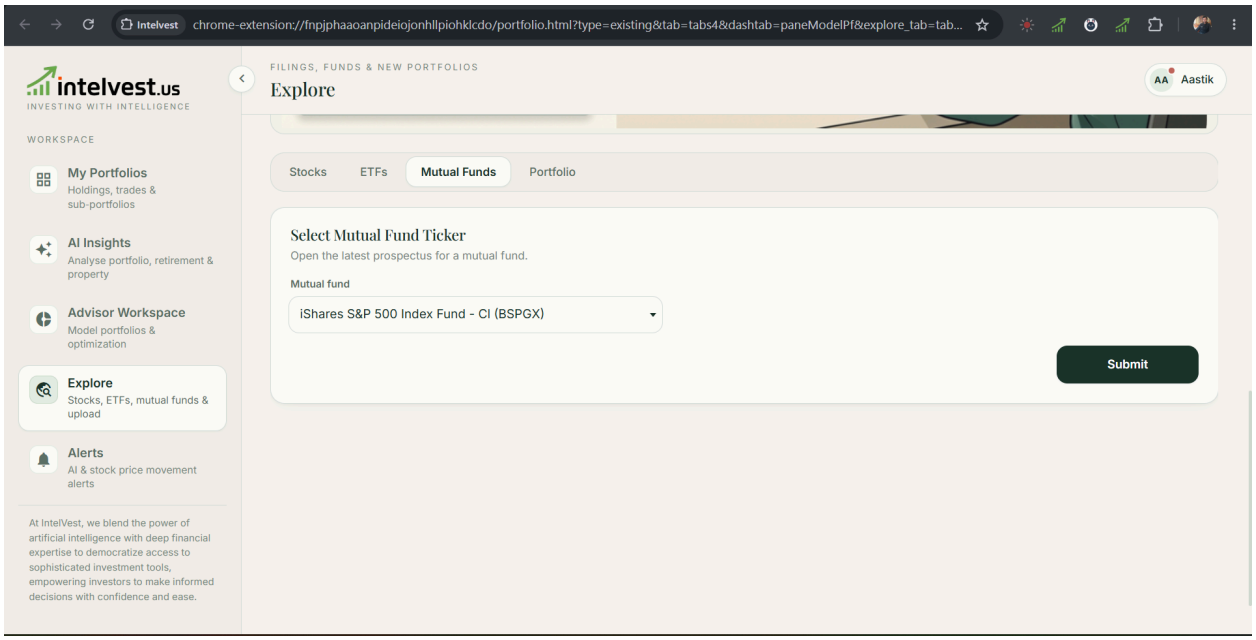
i) Chatbot

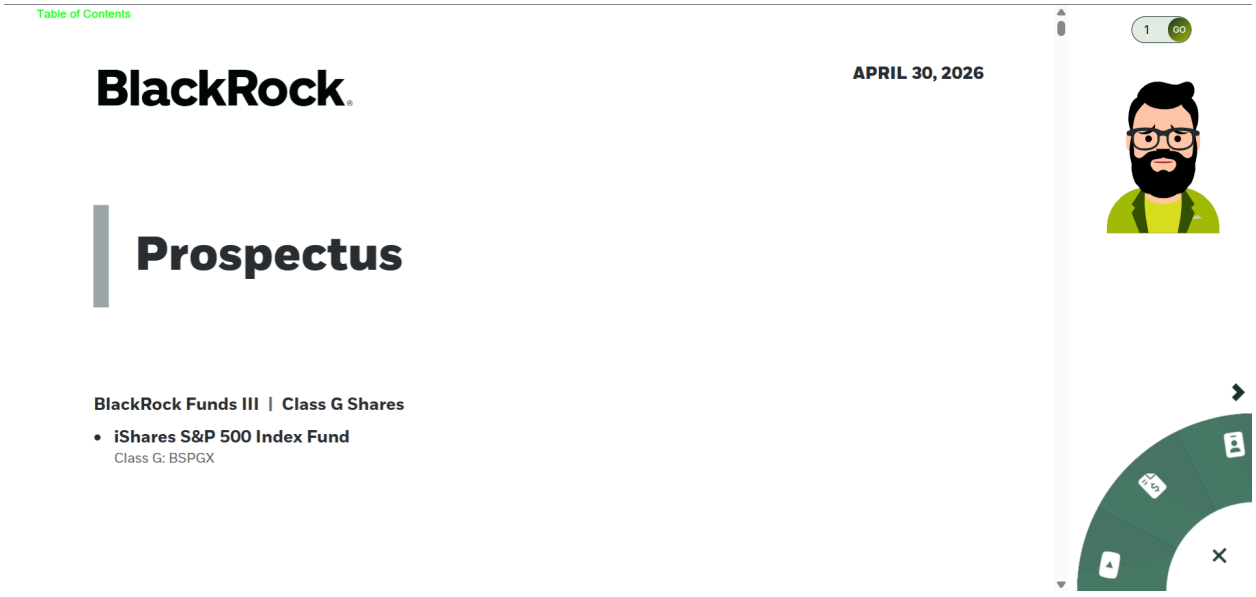
The fourth item within the menu list is for the chatbot. If you are not comfortable asking questions to the avatar, you can make use of the chatbot to type in the questions and get the answers from the AI.



3) Mutual Funds:

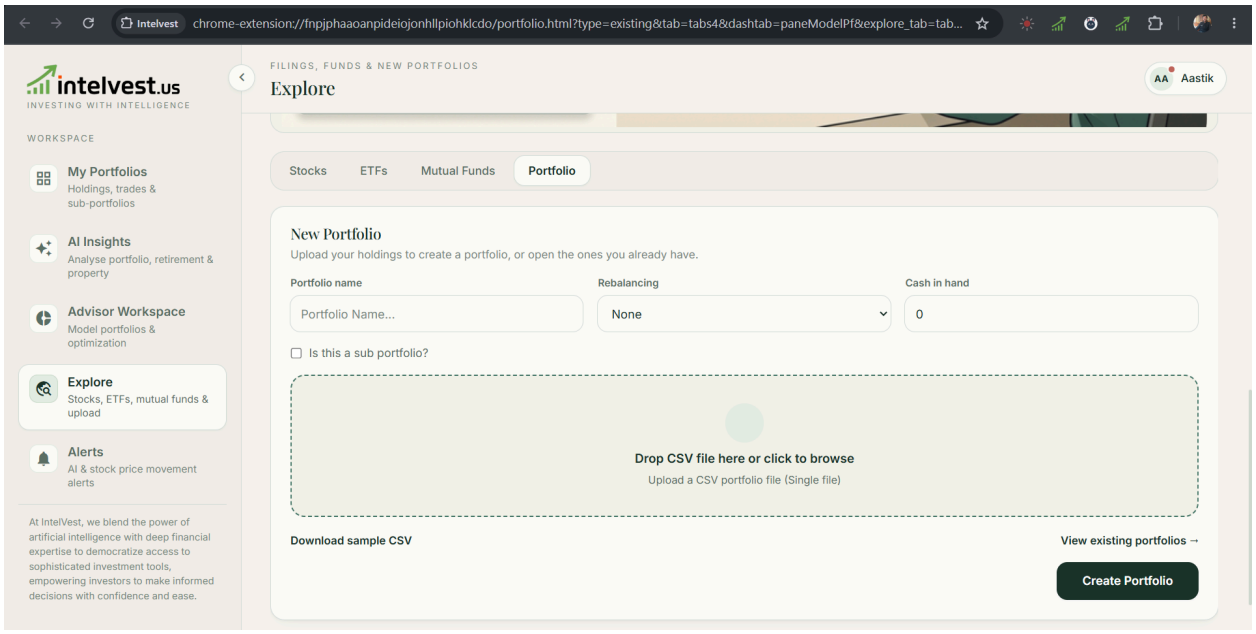
The **Mutual Funds** section under the **Explore** tab provides direct access to regulatory filings and fund documentation. Users simply select a mutual fund ticker from the dropdown menu—such as the *iShares S&P 500 Index Fund - CI (BSPGX)*—and click **Submit** to pull up its latest official BlackRock Prospectus. Once loaded in the integrated document viewer, investors can review key fund details, fee structures, and investment objectives alongside an interactive AI assistant for quick insights. The menu buttons perform the same action as above.





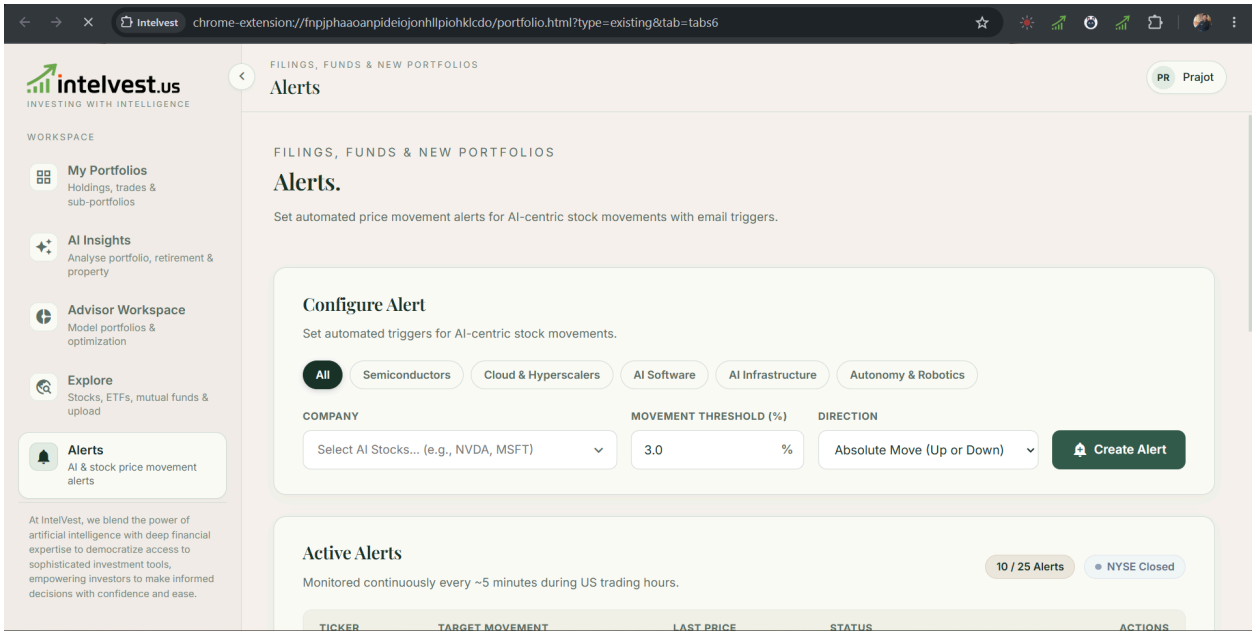
4) Portfolio

The **Portfolio** tab under **Explore** allows users to seamlessly import and configure new investment portfolios within IntelVest. Users can customize their setup by assigning a **Portfolio Name**, selecting a preferred **Rebalancing** schedule, specifying available **Cash in hand**, and designating whether the holdings should be tracked as a sub-portfolio. To populate the assets, users simply drag and drop or browse to upload a single CSV portfolio file (with a downloadable sample CSV provided for easy formatting) before clicking **Create Portfolio** to initialize tracking and analysis



4) Alerts (AI & Stock Price Movement Alerts)

The **Alerts** module in Intelvest is a real-time market monitoring tool designed to keep investors and advisors proactively informed about significant price movements across **AI-centric stocks**. Rather than manually watching charts all day, users can set automated triggers that monitor the market continuously (every ~5 minutes during US trading hours) and send instant email notifications whenever a target threshold is breached.



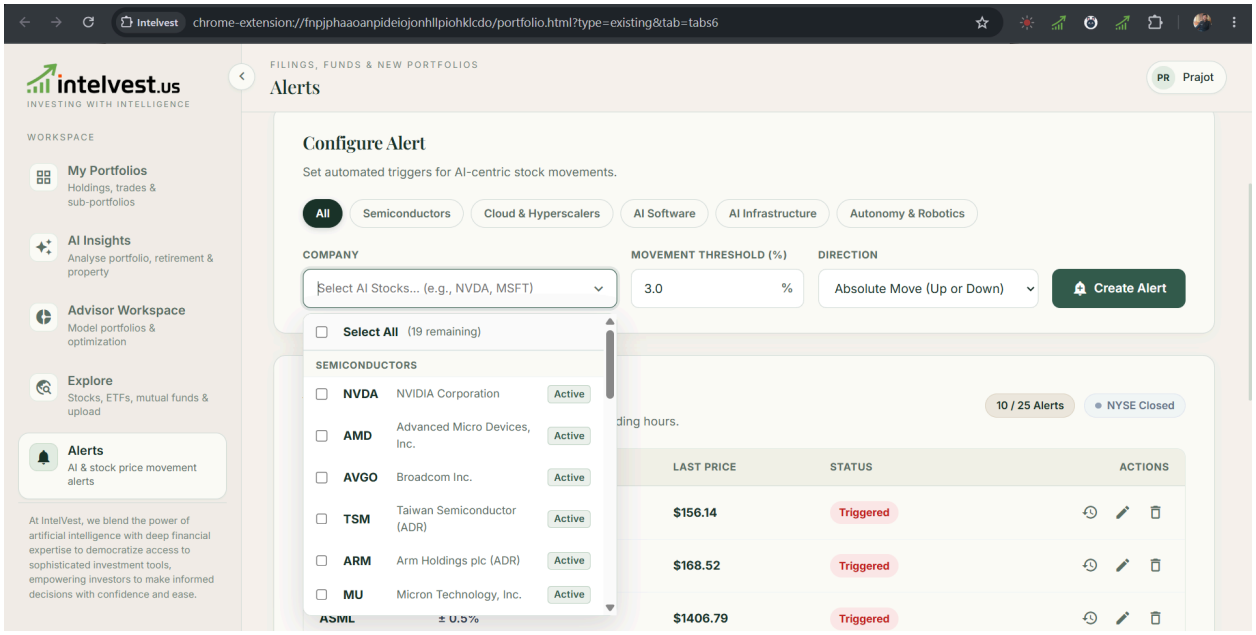
1. Configuring an Alert

Located under the **Alerts** tab in the main workspace sidebar, the **Configure Alert** panel allows you to build custom rules in a few quick steps:

- **Sector Filtering & Multi-Stock Selection:** Intelvest curates a focused universe of AI-driven companies categorized by key industry verticals—**All, Semiconductors, Cloud & Hyperscalers, AI Software, AI Infrastructure,** and **Autonomy & Robotics**. Using the **Company** dropdown, you can filter by sector, select individual tickers (such as `NVDA`, `AMD`, `AVGO`, `TSM`), or use the **Select All** option to apply the same alert rule across multiple stocks simultaneously.
  Screenshot 2026-11-17 110852.png+ 2
- **Movement Threshold (%):** You can define the exact sensitivity of your alert by entering a percentage movement range between **0.5% and 20%**. This flexibility lets you track tight intraday fluctuations for active trading or wider swings for long-term portfolio risk management.

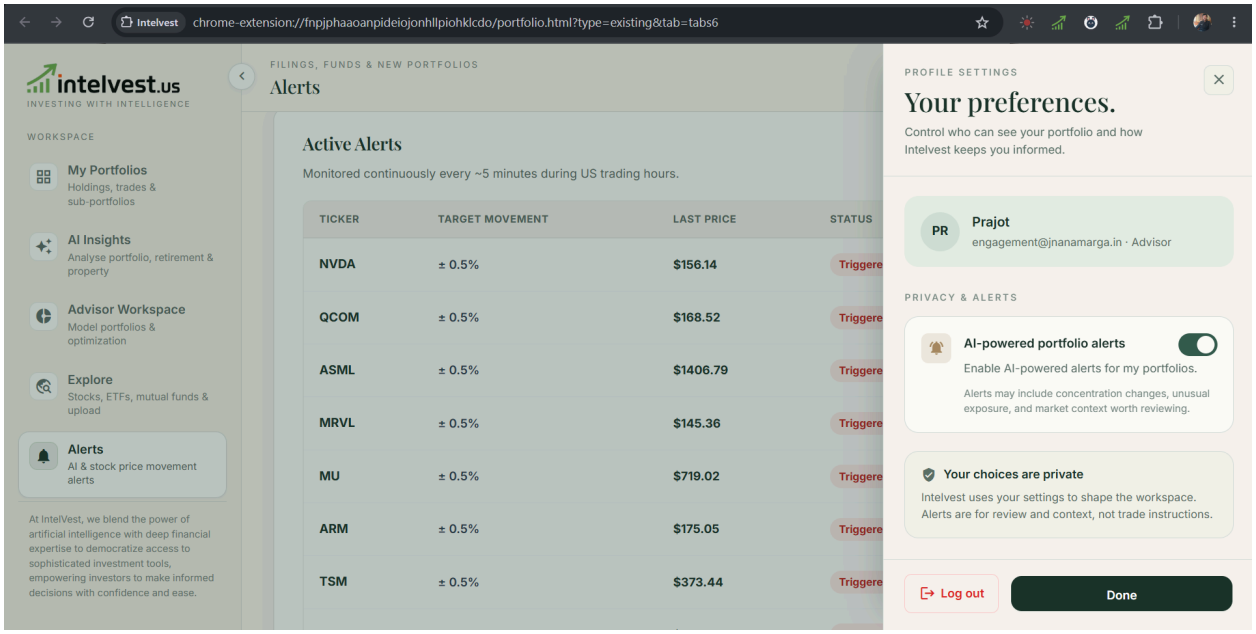
- **Movement Direction:** Choose how the platform evaluates the price change using three distinct trigger modes:
    - **Increase (Up):** Triggers only when the stock price rises by your specified percentage or more.
    - **Decrease (Low):** Triggers only when the stock price drops by your specified percentage or more.
    - **Absolute Move (Up or Down):** Triggers whenever the stock moves by your target percentage in *either* direction, ideal for catching sudden volatility regardless of market direction.

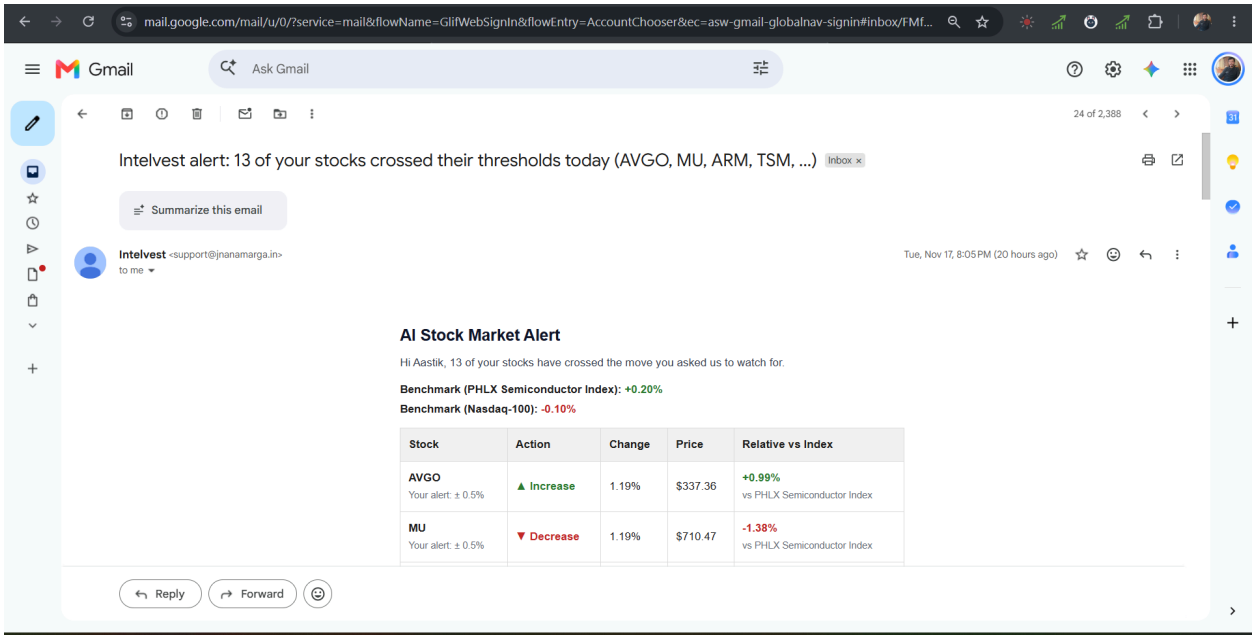
Once configured, clicking **Create Alert** activates the rule and adds the selected stocks to your tracking list (users can maintain up to 25 active alerts at a time).

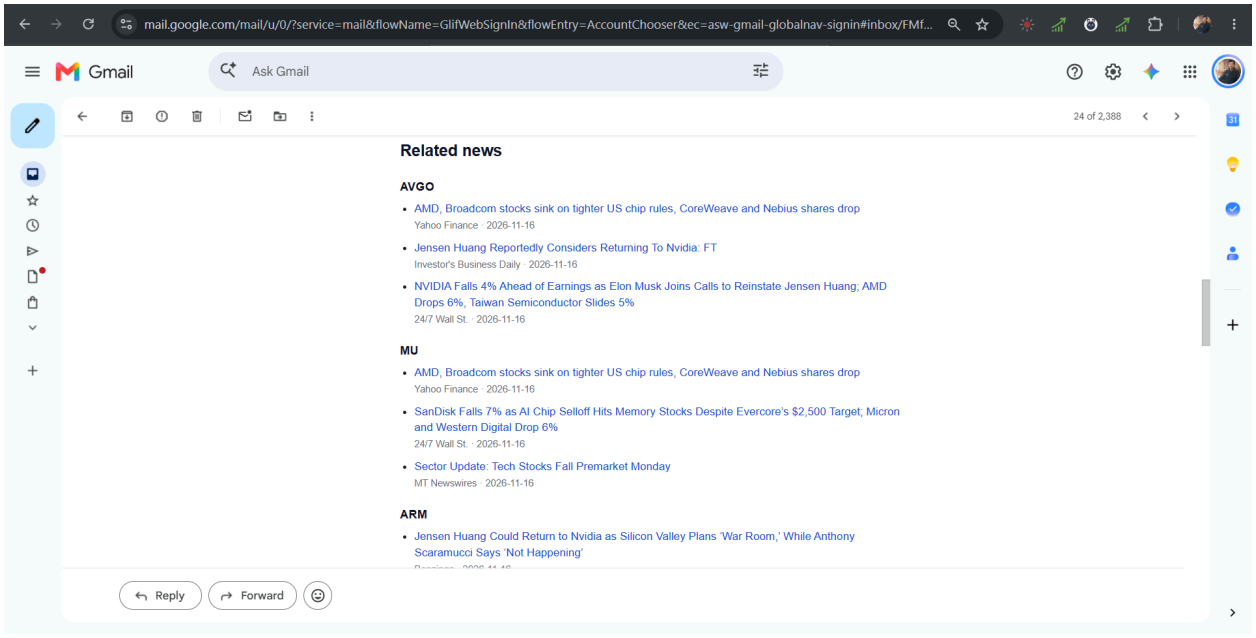


2. Automated Email Notifications

Whenever a tracked stock meets or exceeds your configured threshold during market hours, the system automatically flags the alert as **Triggered**. If you have email notifications enabled (which is turned **on by default**), Intelvest immediately dispatches an email alert containing the price movement details and the news realted so you can act promptly without needing to stay logged into the platform.


Intelvest
chrome-extension://fnpjphaaoanpideiojonhllpiohklcdo/portfolio.html?type=existing&tab=tabs6
intelvest.us
INVESTING WITH INTELLIGENCE
WORKSPACE
My Portfolios
Holdings, trades & sub-portfolios
AI Insights
Analyse portfolio, retirement & property
Advisor Workspace
Model portfolios & optimization
Explore
Stocks, ETFs, mutual funds & upload
Alerts
AI & stock price movement alerts
At IntelVest, we blend the power of artificial intelligence with deep financial expertise to democratize access to sophisticated investment tools, empowering investors to make informed decisions with confidence and ease.
FILINGS, FUNDS & NEW PORTFOLIOS
Alerts
Active Alerts
Monitored continuously every ~5 minutes during US trading hours.
TICKER
TARGET MOVEMENT
LAST PRICE
STATUS
NVDA ± 0.5% $156.14 Triggere
QCOM ± 0.5% $168.52 Triggere
ASML ± 0.5% $1406.79 Triggere
MRVL ± 0.5% $145.36 Triggere
MU ± 0.5% $719.02 Triggere
ARM ± 0.5% $175.05 Triggere
TSM ± 0.5% $373.44 Triggere
PROFILE SETTINGS
Your preferences.
Control who can see your portfolio and how Intelvest keeps you informed.
PR
Prajot
engagement@jnanamarga.in · Advisor
PRIVACY & ALERTS
AI-powered portfolio alerts
Enable AI-powered alerts for my portfolios.
Alerts may include concentration changes, unusual exposure, and market context worth reviewing.
Your choices are private
Intelvest uses your settings to shape the workspace. Alerts are for review and context, not trade instructions.
Log out
Done

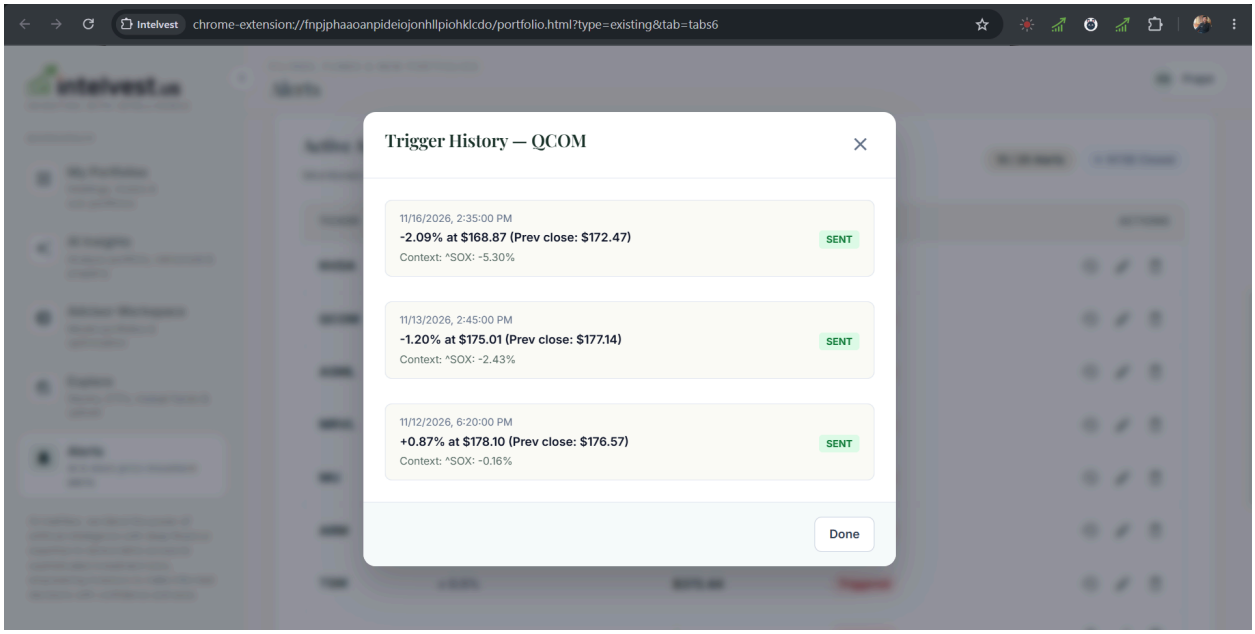

mail.google.com/mail/u/0/?service=mail&flowName=GlifWebSignIn&flowEntry=AccountChooser&ec=asw-gmail-globalnav-signin#inbox/FMf...
Gmail
Ask Gmail
24 of 2,388
Intelvest alert: 13 of your stocks crossed their thresholds today (AVGO, MU, ARM, TSM, ...)
Inbox ×
Summarize this email
Intelvest <support@jnanamarga.in>
to me
Tue, Nov 17, 8:05 PM (20 hours ago)
AI Stock Market Alert
Hi Aastik, 13 of your stocks have crossed the move you asked us to watch for.
Benchmark (PHLX Semiconductor Index): +0.20%
Benchmark (Nasdaq-100): -0.10%
Stock
Action
Change
Price
Relative vs Index
AVGO
Your alert: ± 0.5%
▲ Increase
1.19%
$337.36
+0.99%
vs PHLX Semiconductor Index
MU
Your alert: ± 0.5%
▼ Decrease
1.19%
$710.47
-1.38%
vs PHLX Semiconductor Index
Reply
Forward



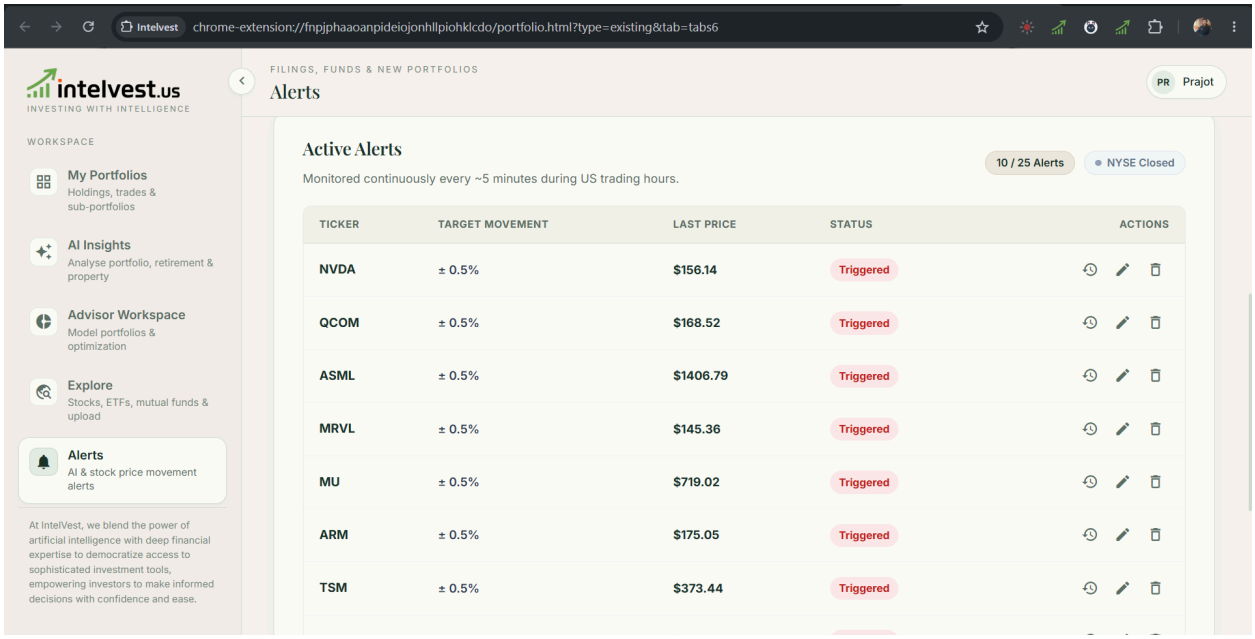
3. Managing Active Alerts & Trigger History

Below the configuration panel, the **Active Alerts** dashboard provides a live overview of all your monitored tickers, displaying their **Target Movement**, **Last Price**, current **Status** (e.g., *Active* or *Triggered*), and market state (*NYSE Open/Closed*). Each alert row includes three quick-action icons on the right:

- **View Trigger History (Clock Icon):** Clicking this opens a detailed **Trigger History** log for that specific ticker (e.g., *Trigger History — QCOM*). It records every past instance the alert fired—complete with the exact timestamp, percentage move, trigger price vs. previous close, broader benchmark context (such as `^SOX` index performance), and email delivery confirmation (`SENT`).



- **Edit Alert (Pencil Icon):** Allows you to modify the movement threshold percentage or change the trigger direction on the fly without recreating the alert from scratch.
- **Delete Alert (Trash Icon):** Permanently removes the alert from your active watchlist, freeing up space within your 25-alert quota.

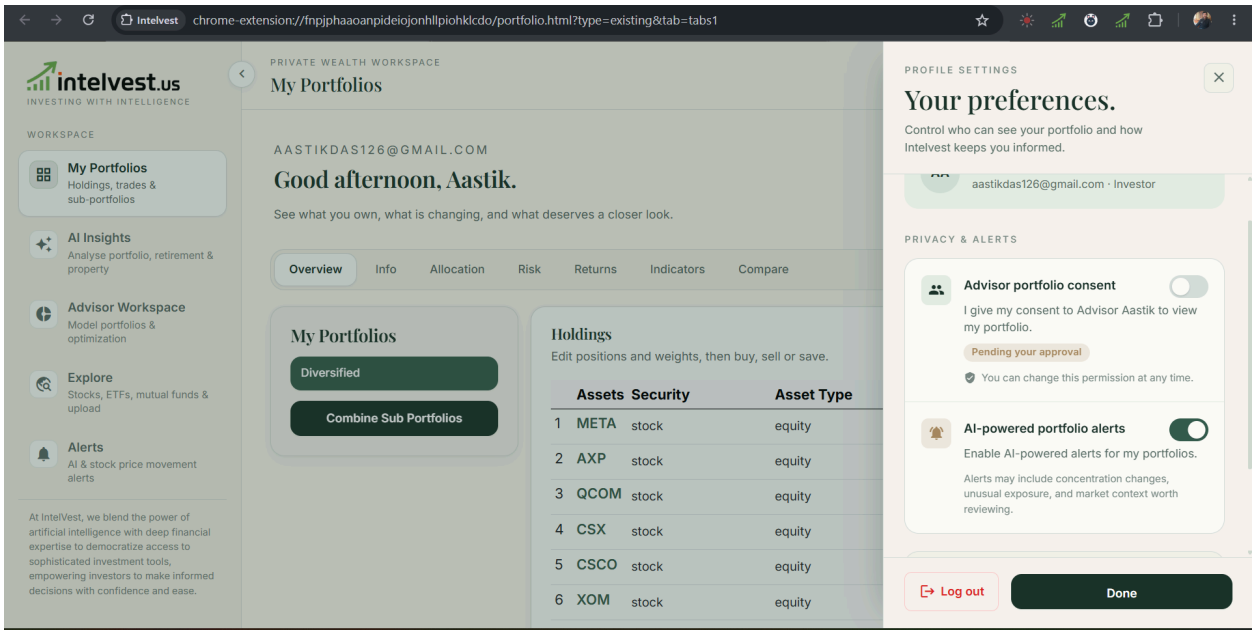


Profile Settings & Preferences Drawer

The Your preferences slide-over drawer gives users centralized control over their account identity, advisor data permissions, and automated notification settings. It organizes essential account controls into three key features:

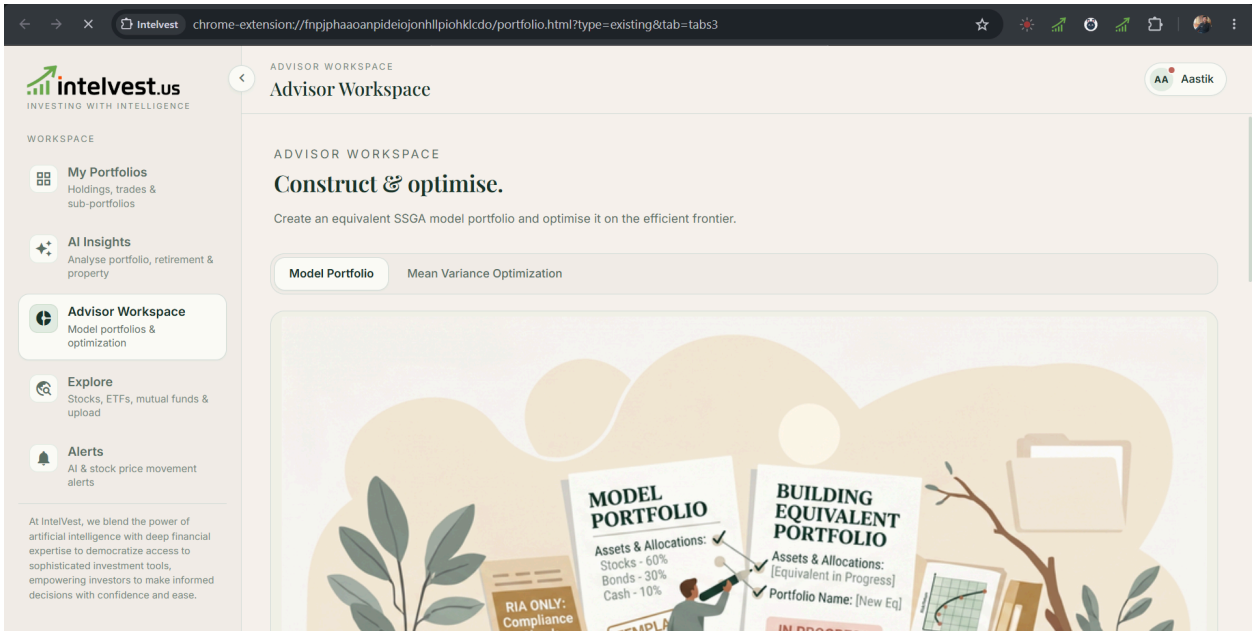
- User Profile & Role Identification: At the top of the drawer, users can view their registered account details, including their display name, associated email address, and assigned platform role (*Investor*). This ensures clear visibility into the active profile and account type being managed.
- Advisor Portfolio Consent: Under the Privacy & Alerts section, an interactive toggle allows clients to grant or revoke portfolio access for their linked financial advisor. When an advisor sends a connection request, the status appears as *Pending your approval*, giving the investor complete autonomy to approve visibility or turn off permissions at any time.
- AI-Powered Portfolio Alerts: Below the consent toggle, users can enable or disable automated AI-powered alerts for their portfolios. When turned on, IntelVest continuously monitors holdings and sends proactive notifications regarding portfolio concentration changes, unusual risk exposure, and relevant market context worth reviewing**.**

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5) Advisor Workspace

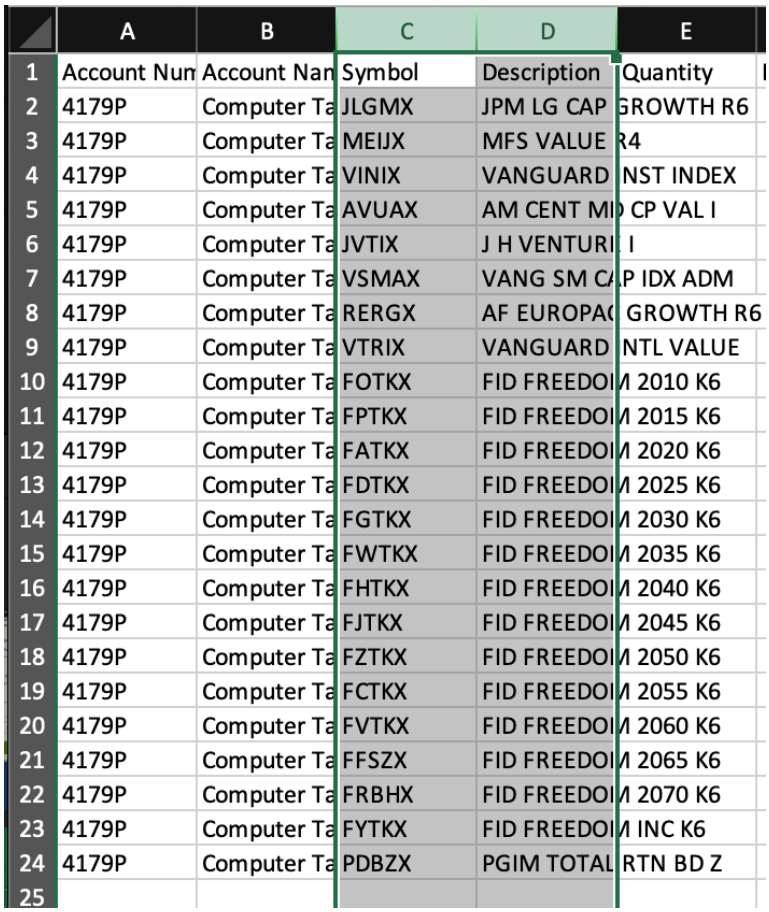
The **Advisor Workspace** serves as a dedicated module within IntelVest designed to help users construct, benchmark, and optimize investment portfolios. It bridges institutional-grade financial modeling with everyday retail investing by offering two core workflows: building equivalent State Street Global Advisors (SSGA) model portfolios and mathematically optimizing asset allocations along the Efficient Frontier.



A) Model Portfolio

The **Build Model Portfolios from Retirement Funds** feature provides an accessible way to align personal holdings with institutional strategies. Users can upload their existing retirement fund portfolio as a CSV file (containing asset symbols and descriptions), and the system automatically maps those holdings to equivalent, correlated ETFs from SSGA's active asset allocation model portfolios.

The R.I.A can first select the type of the portfolio he wants to build i.e. conservative, moderate or growth and then upload his clients retirement funds in the CSV format. **Make sure that your CSV file has the column, Symbol and Description.**



	A	B	C	D	E
1	Account Num	Account Nan	Symbol	Description	Quantity
2	4179P	Computer Ta	JLGMX	JPM LG CAP	GROWTH R6
3	4179P	Computer Ta	MEIJX	MFS VALUE	R4
4	4179P	Computer Ta	VINIX	VANGUARD	NST INDEX
5	4179P	Computer Ta	AVUAX	AM CENT MI	CP VAL I
6	4179P	Computer Ta	JVTIX	J H VENTURI	I
7	4179P	Computer Ta	VSMAX	VANG SM CA	P IDX ADM
8	4179P	Computer Ta	RERGX	AF EUROPAC	GROWTH R6
9	4179P	Computer Ta	VTRIX	VANGUARD	NTL VALUE
10	4179P	Computer Ta	FOTKX	FID FREEDOI	M 2010 K6
11	4179P	Computer Ta	FPTKX	FID FREEDOI	M 2015 K6
12	4179P	Computer Ta	FATKX	FID FREEDOI	M 2020 K6
13	4179P	Computer Ta	FDTKX	FID FREEDOI	M 2025 K6
14	4179P	Computer Ta	FGTKX	FID FREEDOI	M 2030 K6
15	4179P	Computer Ta	FWTKX	FID FREEDOI	M 2035 K6
16	4179P	Computer Ta	FHTKX	FID FREEDOI	M 2040 K6
17	4179P	Computer Ta	FJTKX	FID FREEDOI	M 2045 K6
18	4179P	Computer Ta	FZTKX	FID FREEDOI	M 2050 K6
19	4179P	Computer Ta	FCTKX	FID FREEDOI	M 2055 K6
20	4179P	Computer Ta	FVTKX	FID FREEDOI	M 2060 K6
21	4179P	Computer Ta	FFSZX	FID FREEDOI	M 2065 K6
22	4179P	Computer Ta	FRBHX	FID FREEDOI	M 2070 K6
23	4179P	Computer Ta	FYTKX	FID FREEDOI	M INC K6
24	4179P	Computer Ta	PDBZX	PGIM TOTAL	RTN BD Z
25					

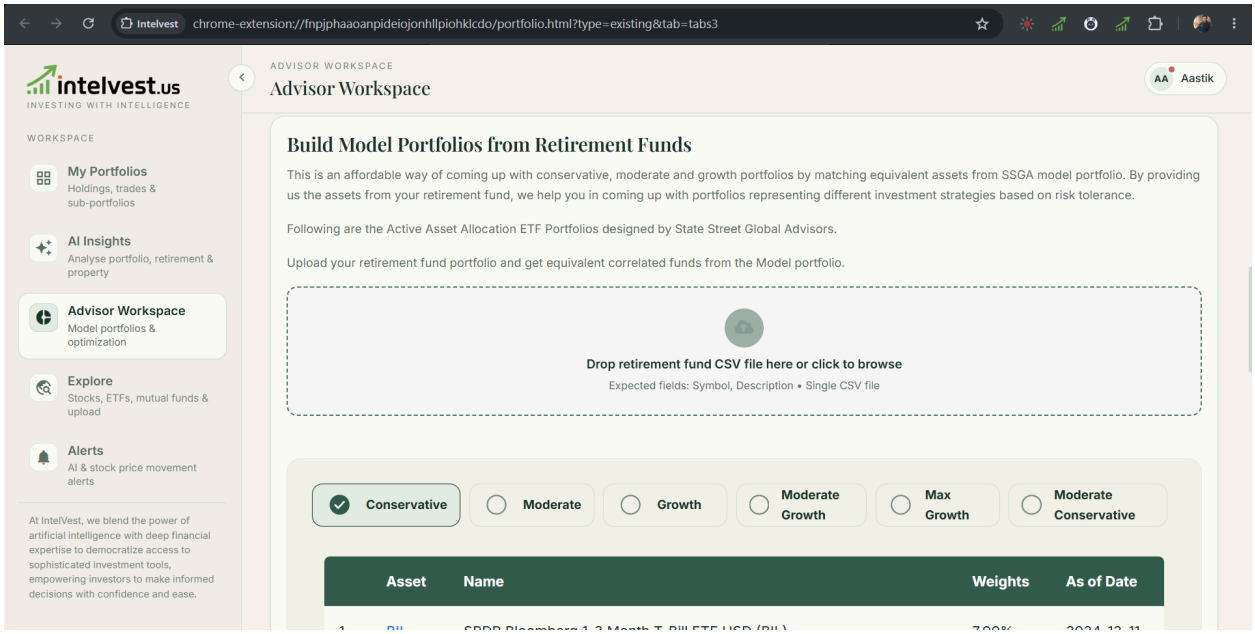
Once the file gets uploaded it will start matching the equivalent retirement funds with model portfolio funds. This may take some time.

Once the matching is done, you will be shown the list of equivalent funds besides the model funds along with its correlation match. The R.I.A has an option to select the best correlated assets. He can also select more than one asset matching the model fund.

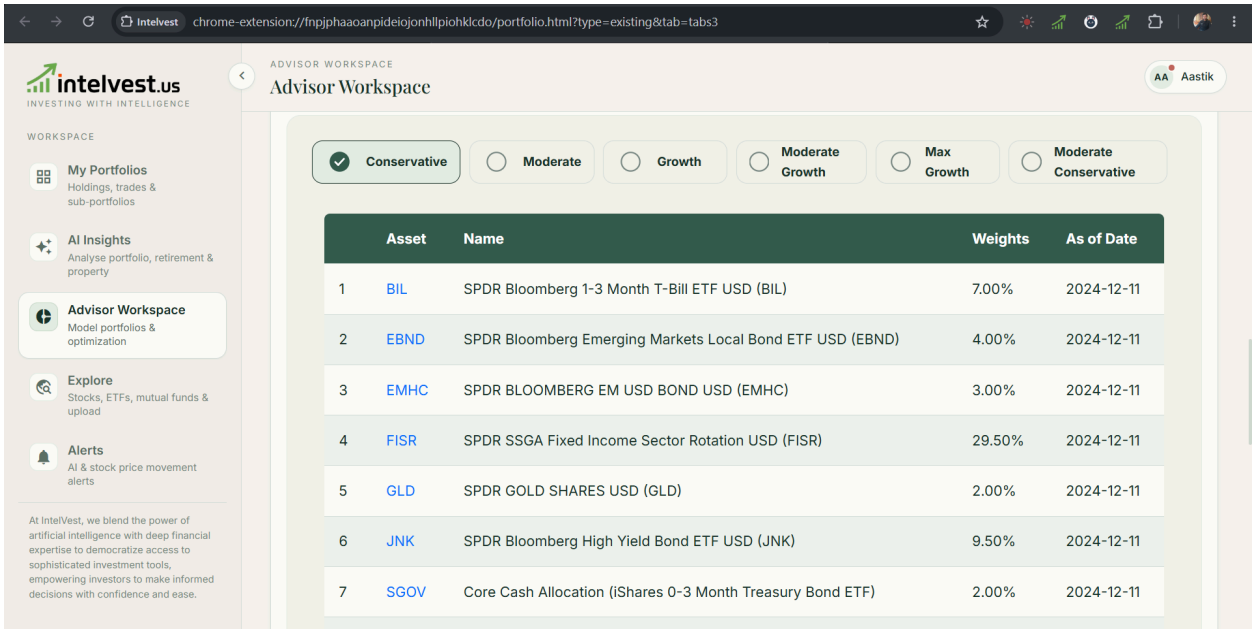
After selecting the equivalent funds, he can click on the Generate Portfolio button. This will generate the portfolio using the equivalent funds from the retirement plan. The R.I.A can save this portfolio by giving it a name.

Once the new portfolio is saved you will notice it in the compare section below.

The newly constructed portfolio will be closely tracking the type of the portfolio he had selected while uploading the retirement fund csv. To compare them, click on the compare portfolio button.



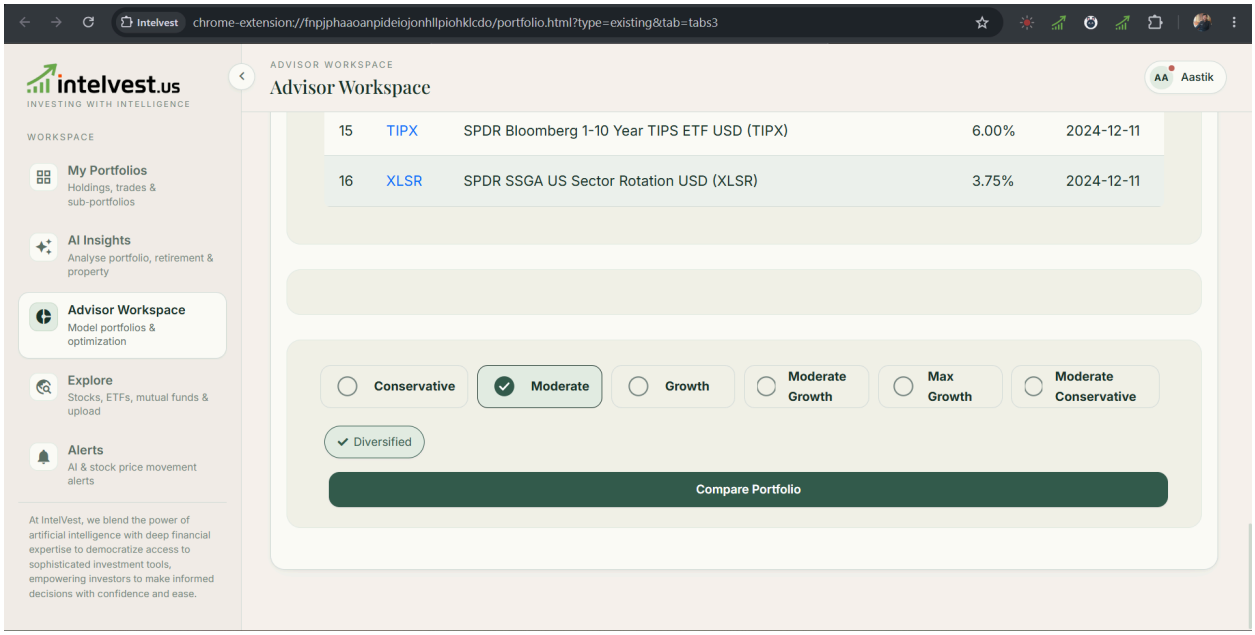
To tailor recommendations to individual risk appetites, users can toggle between six distinct risk profiles: *Conservative*, *Moderate Conservative*, *Moderate*, *Moderate Growth*, *Growth*, and *Max Growth*. When a profile—such as **Conservative**—is selected, the workspace dynamically displays the exact ETF breakdown, target percentage weights, and pricing dates (e.g., allocations across short-term Treasury bills like BIL, fixed-income sector rotation like FISR, and high-yield bonds like JNK).



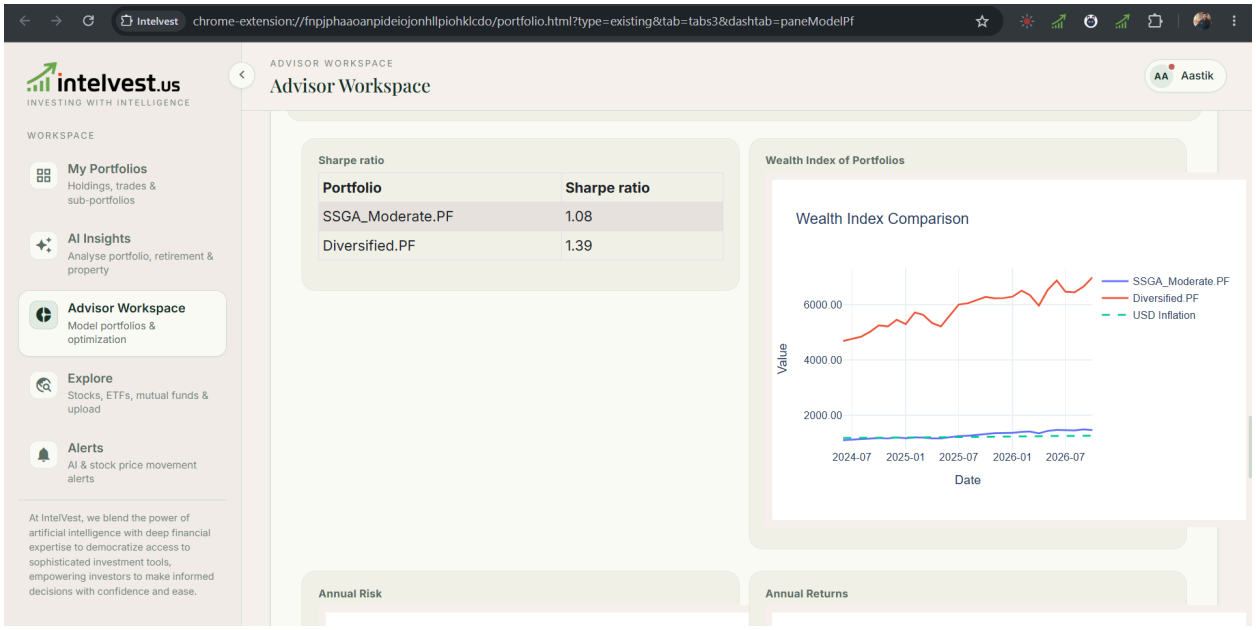
Once a strategy is chosen (such as *Moderate* alongside the *Diversified* option), users can click **Compare Portfolio** to evaluate how the SSGA model stacks up against a diversified benchmark. The analytics dashboard immediately generates key performance metrics, including

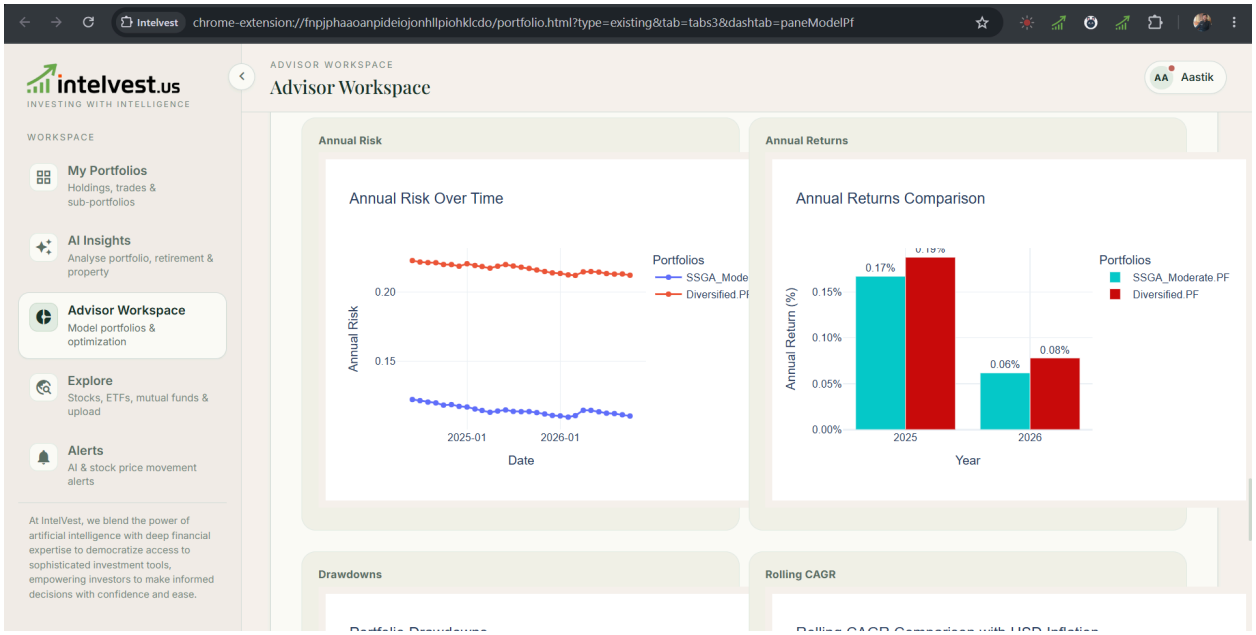
a **Sharpe Ratio** comparison table and a **Wealth Index Comparison** chart tracking historical portfolio growth against USD inflation.

You will notice that the newly created portfolio closely tracks with SSGA moderate portfolio with the help of the various graphs shown here. You can see how closely it tracks the model portfolio interns of Risk, Returns, Drawdowns and the rolling CAGR.



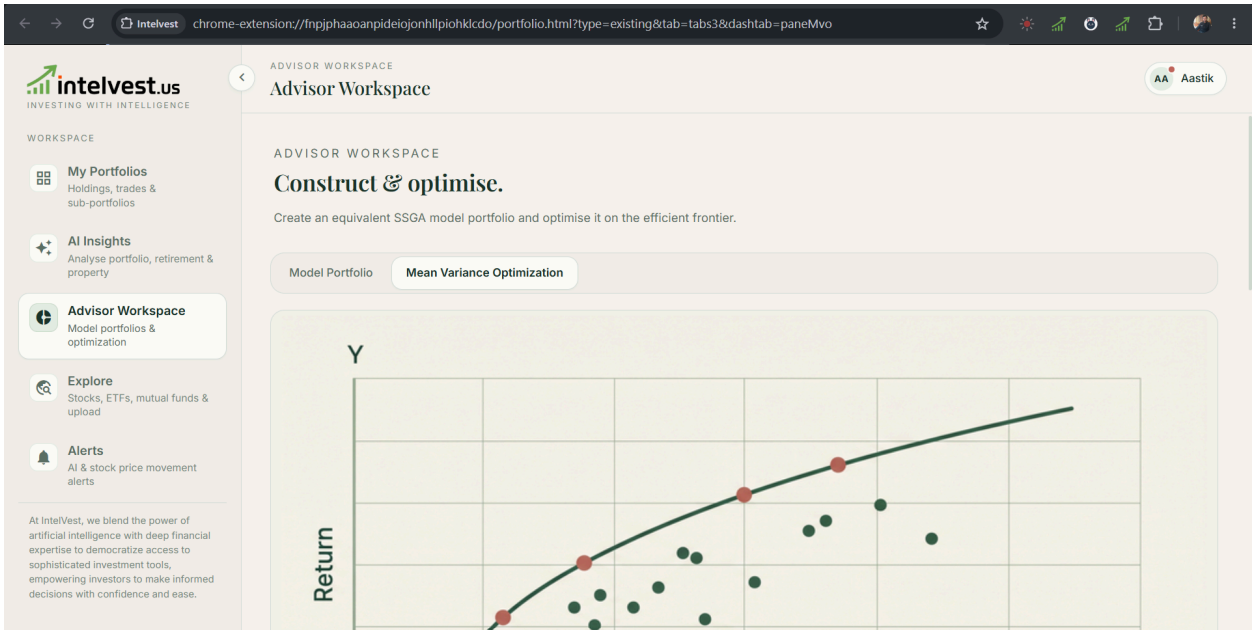
Further down the comparison view, users gain deeper visibility into downside protection and consistency through side-by-side visualizations of **Annual Risk Over Time** and **Annual Returns Comparison**, alongside drawdown and rolling CAGR metrics.



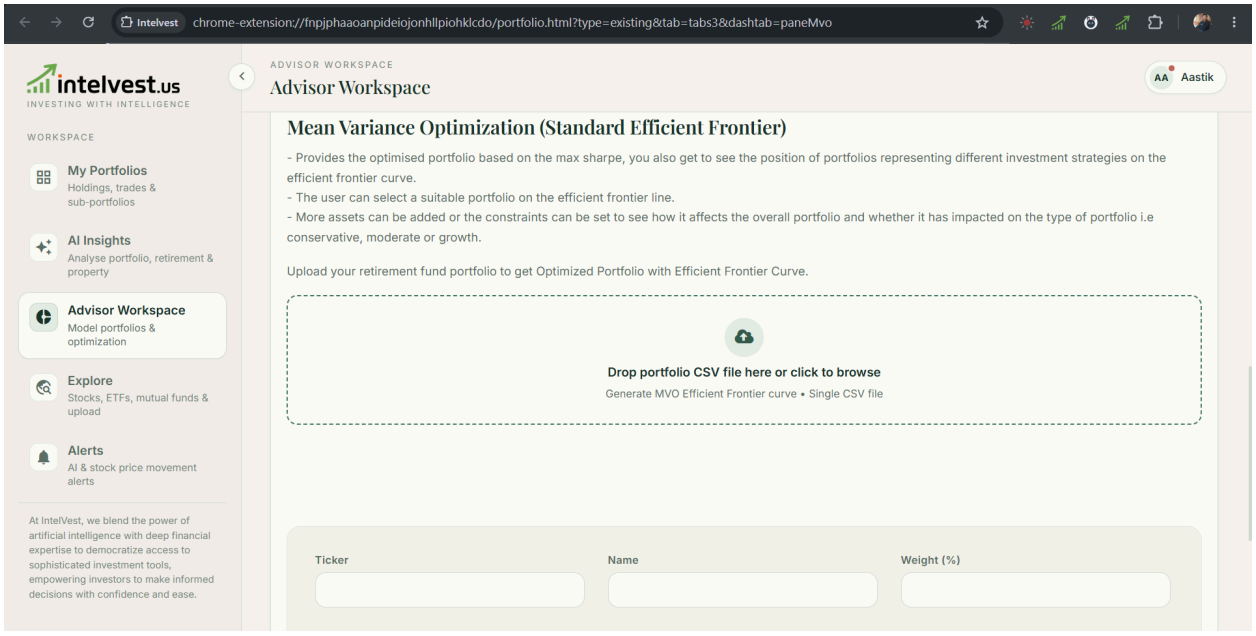


B) Mean Variance Optimization

The **Mean Variance Optimization (Standard Efficient Frontier)** tab enables users to mathematically optimize their portfolio for maximum risk-adjusted returns (Max Sharpe Ratio). By plotting various asset combinations on an interactive Efficient Frontier curve, users can visually identify optimal portfolios suited for conservative, moderate, or growth strategies.



To run an optimization, users simply drag and drop or browse to upload their portfolio as a single CSV file. Once uploaded, the workspace allows further customization by letting users manually input or adjust individual asset tickers, names, and percentage weights—or apply specific constraints—to dynamically observe how changes impact the overall portfolio's position on the Efficient Frontier.



The R.I.A can come up with an optimised portfolio using the Mean Variance Optimisation with Efficient Frontier curve. The R.I.A can start by uploading his clients Retirement account. **The CSV file can be like the one shown in the previous section. Make sure that your CSV file has the column, Symbol and Description.**

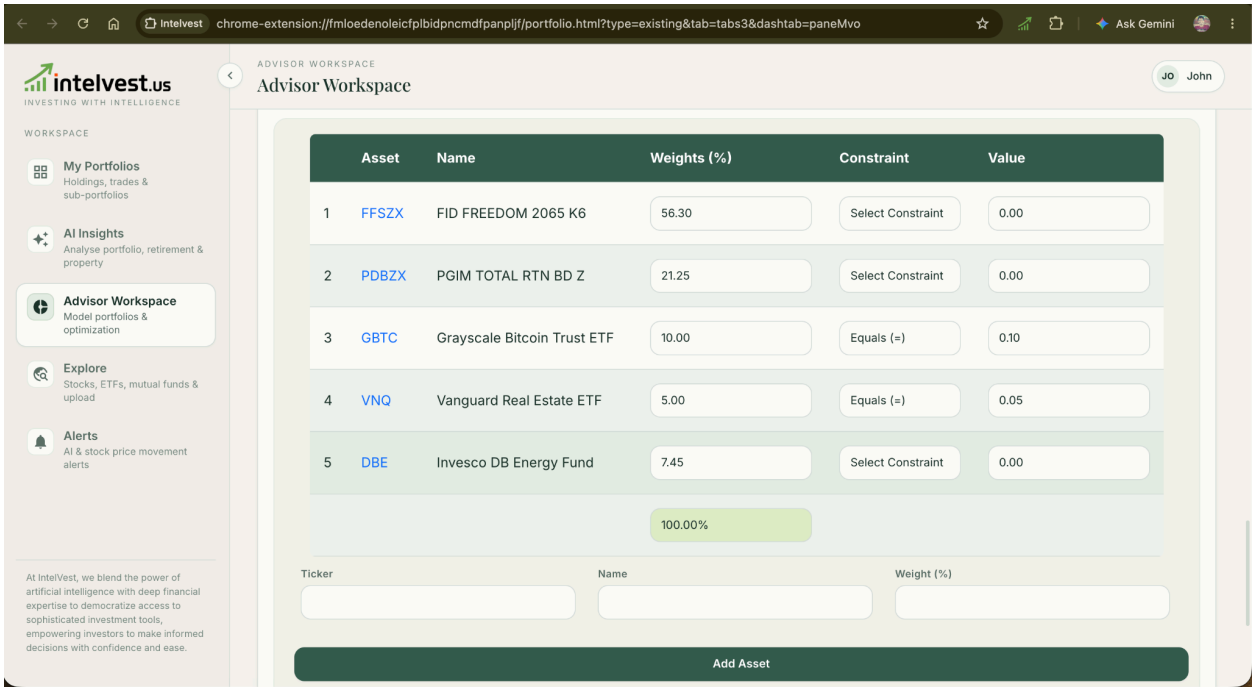
Once the file gets uploaded, it will generate weights to be assigned to each of these retirement funds thus coming up with an optimised portfolio. It will also show you the sharpe ratio along with annual risk and returns.

This optimisation is performed using the standard Efficient Frontier and therefore you will get to see the graph with an efficient frontier curve plotted on it. The max sharpe point that you see here corresponds to the optimised portfolio shown above. Similarly if you go over the line, you will notice the other combinations of the portfolio from the retirement funds.

The R.I.A can make use of this graph to explain to his clients the various portfolios he can go with based on risk and returns. Each point on this curve will constitute a portfolio with assets from the retirement fund. The SSGA model portfolios will be also plotted in this graph which will make the client understand how close the newly constructed portfolio is with respect to the SSGA model portfolio.

If the client wants to go with a moderate conservative portfolio, the RIA will simply select the point on the efficient frontier curve just above the moderate conservative point. By inputting the risk or return of the selected point, he can get the portfolio attached to that point.

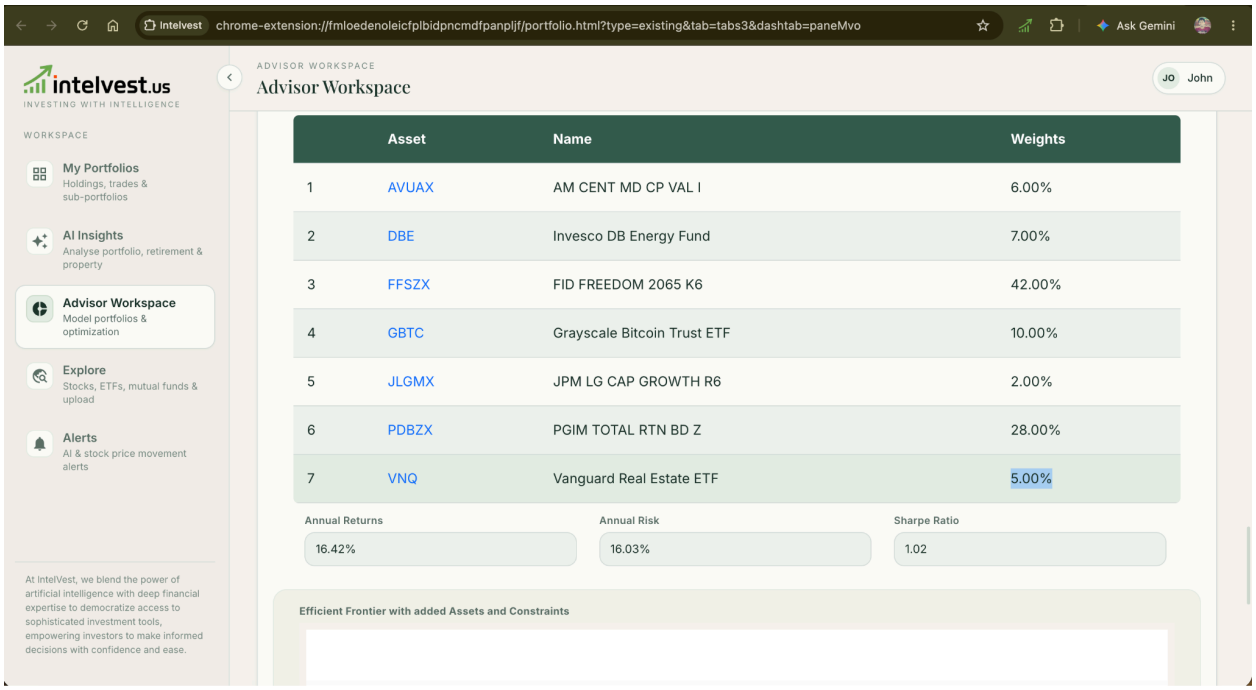




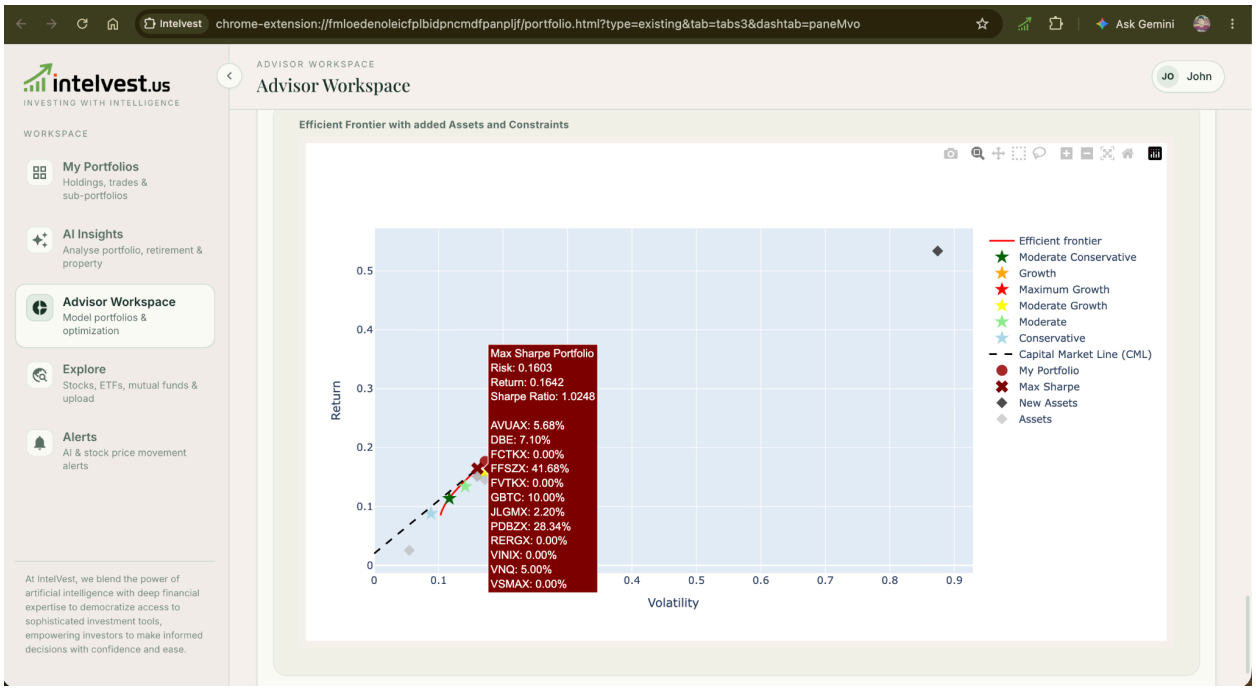
Here he can also add his own assets, as well as set constraints to it.

To make this portfolio better diversified I have included alternative investments like bitcoin, real estate and Energy fund. Grayscale Bitcoin Trust ETF for 10%, Vanguard Real Estate ETF for 5% and Invesco DB Energy Fund for 7.45%. Make sure you adjust the weights such that the total portfolio weight comes to 100%.

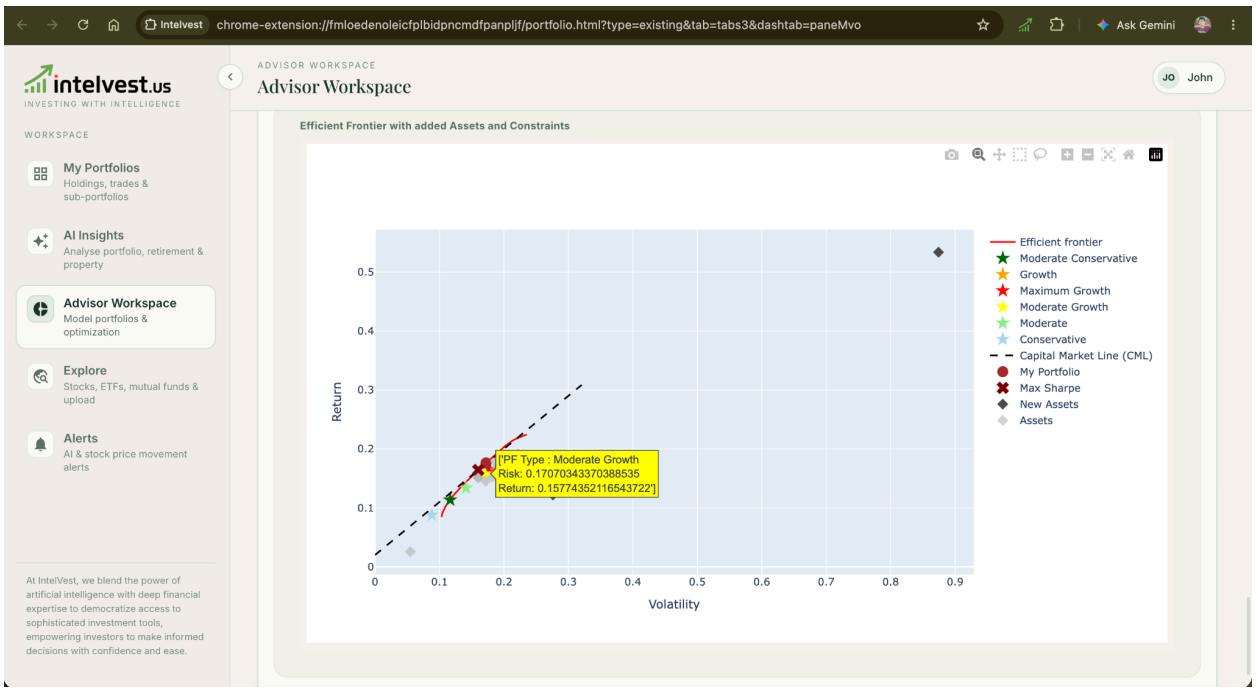
I have also set the constraints to Bitcoin and Real estate to be equal to 10% and 5% respectively.
You can also include thematic strategies like AI, semi and tech infra, software as well as sector special strategies.
Now let's see the reflected changes by clicking on Generate Frontier with new Settings button.



You will see that our constraints have been applied and the optimised portfolio strictly comprises 10% bitcoin and 5% real estate.

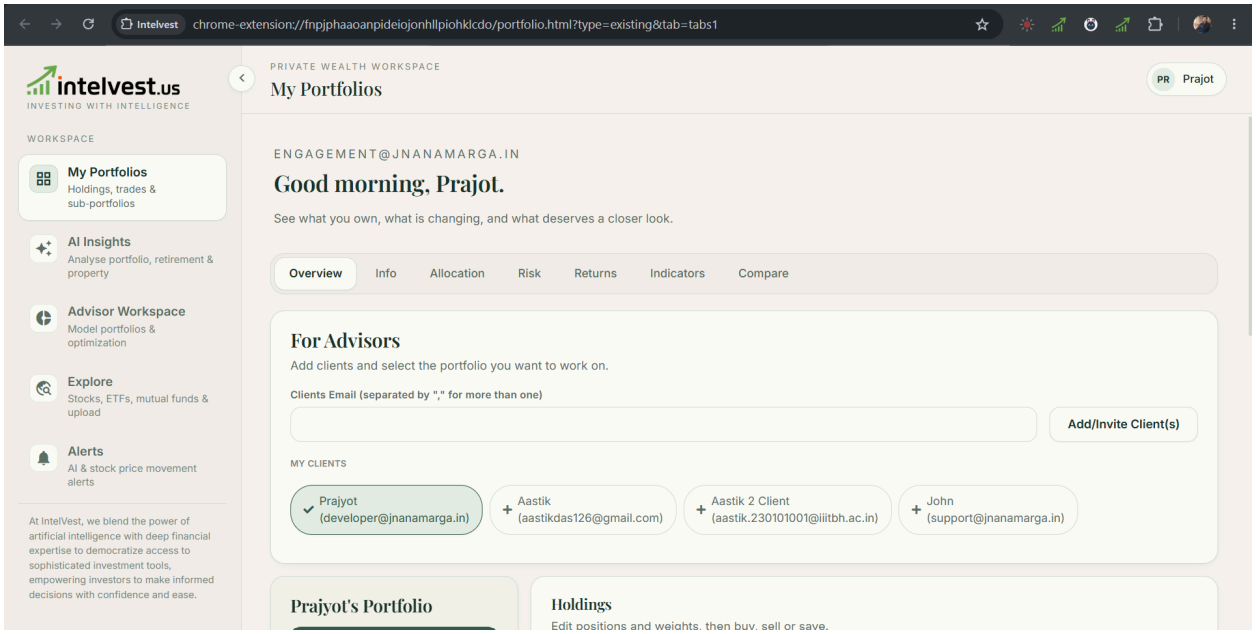


Further when you have a look at the graph, you would notice that the max sharpe point has been raised to a higher risk value as well as our new portfolio. Due to higher risk involved in Bitcoin fund and since we have constrained it to be 10%, our moderate conservative portfolio has drifted towards moderate growth. In this way the RIA will be able to manage risk, facilitate periodic rebalancing and manage ongoing diversification to achieve superior risk/return performance.



Advisors Account POV

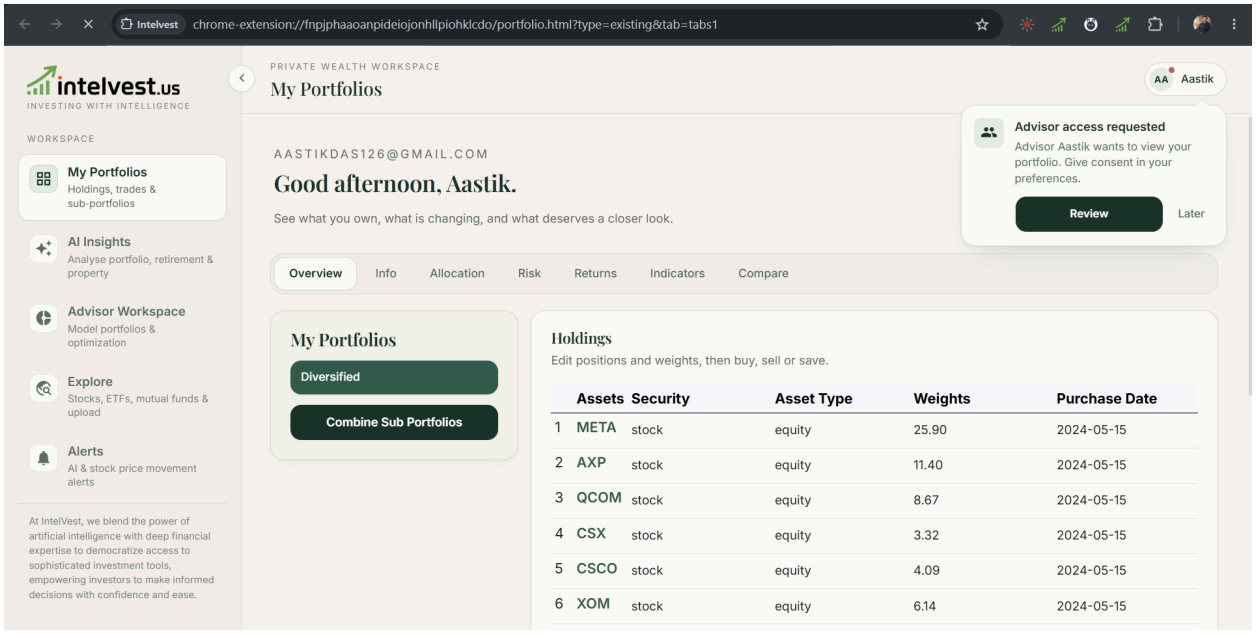
Intelvest offers a comprehensive advisor workflow that empowers financial professionals to onboard, manage, and communicate with multiple clients from a single unified workspace. To get started, an advisor creates an advisor account on the platform, unlocking dedicated multi-client portfolio oversight right within the **My Portfolios** dashboard.

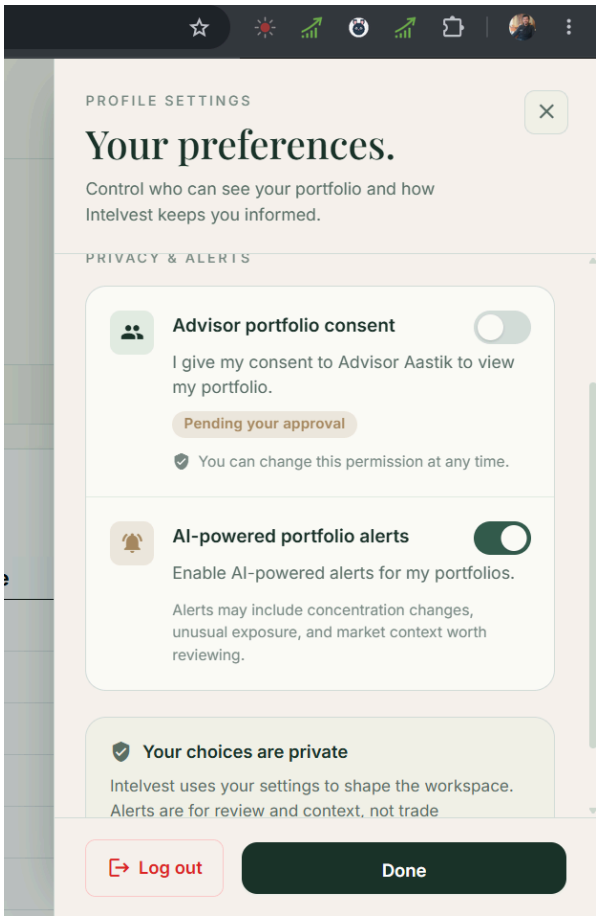


Through the **For Advisors** panel, advisors can effortlessly build their roster by entering one or multiple client email addresses separated by commas and clicking **Add/Invite Client(s)**. This bulk-invitation capability streamlines client onboarding whether managing a handful of accounts or scaling across an entire advisory practice.

The invitation system intelligently handles two distinct onboarding scenarios depending on the client's registration status. If the entered email address does not yet belong to an IntelVest user, the platform dispatches an onboarding invitation prompting the client to create an account and link with their advisor. Conversely, if the email is already associated with an existing IntelVest account, the system immediately maps the connection between the advisor and the client.

To ensure strict data privacy and client consent, portfolio visibility is entirely permission-based. Once mapped, the client receives an access request and can authorize the advisor directly from their own workspace by toggling the access button located in their sidebar. Just as easily, clients retain full autonomy over their financial data and can revoke advisor access at any time with a single click.

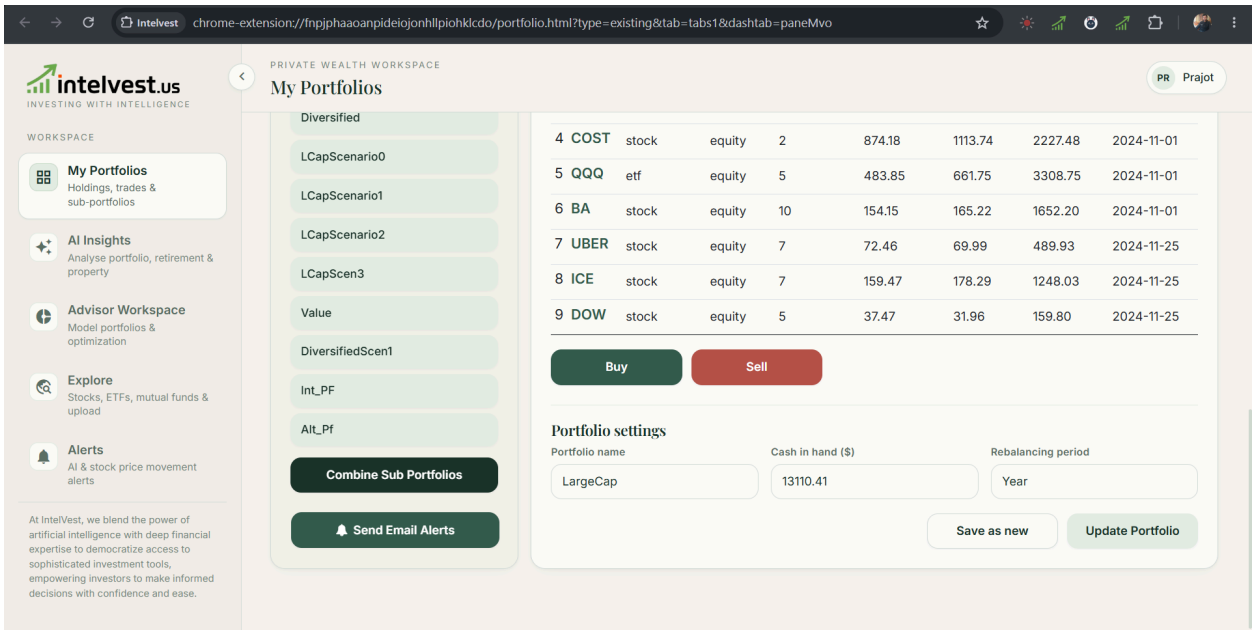




As soon as a client grants permission, their profile appears under the **MY CLIENTS** roster on the advisor's dashboard. Advisors can seamlessly switch between connected

clients—such as selecting between *Prajyot*, *Aastik*, or *John*—to inspect their individual holdings, sub-portfolios, asset allocations, risk metrics, and historical returns.

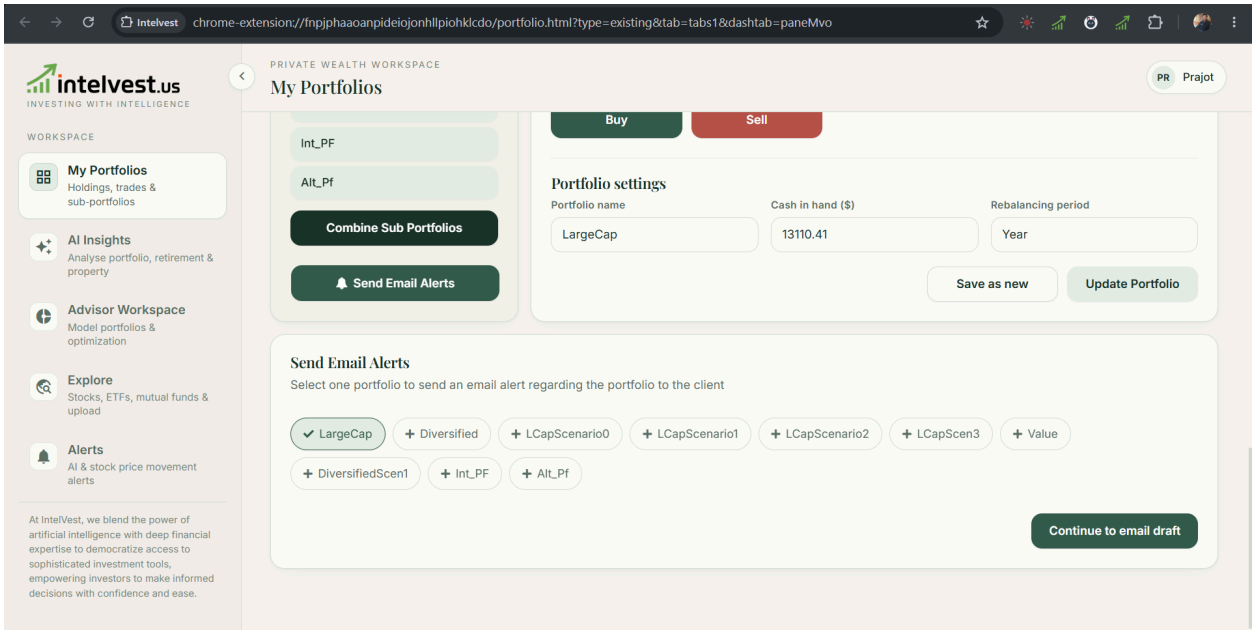
Beyond passive monitoring, advisors can actively manage and customize client strategies directly from the workspace. They can review and edit position weights, simulate buy or sell adjustments, update rebalancing periods, or combine sub-portfolios to test different investment scenarios before recommending changes.



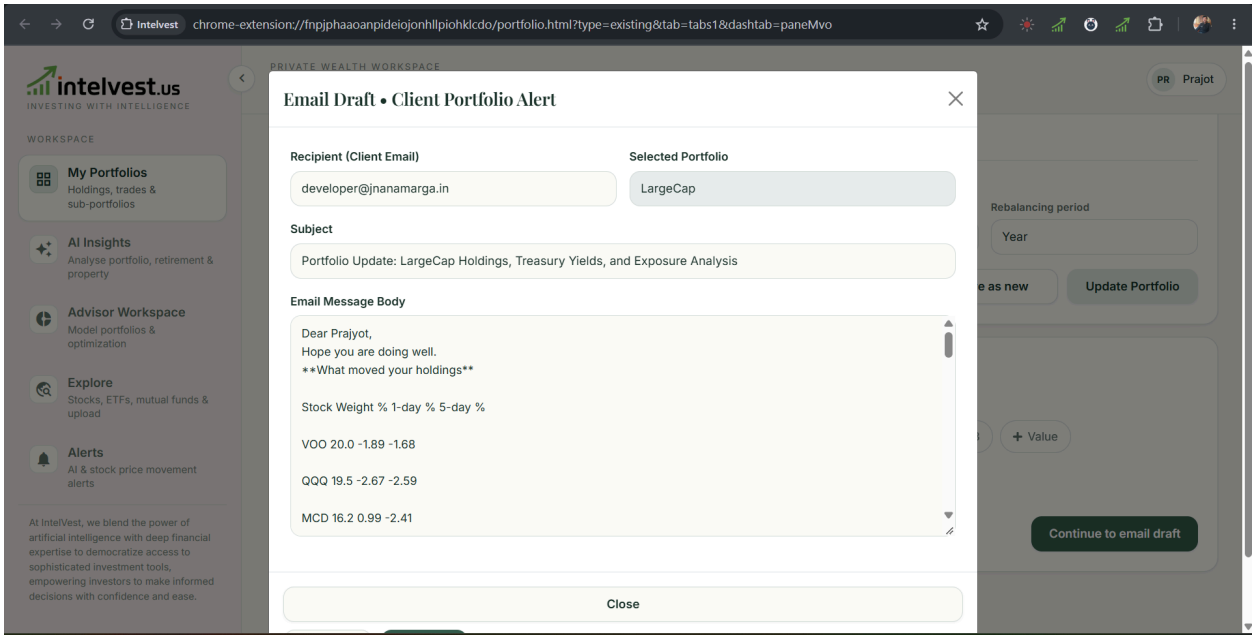
Send Email Alerts

The "Send Email Alerts" feature is a powerful communication tool designed to help Investment Advisors keep their clients informed about critical portfolio updates.

Located within the "My Portfolios" section, clicking the "Send Email Alerts" button opens a dedicated panel where the advisor can select a specific portfolio (such as "LargeCap" or "Diversified") to report on.



Once a portfolio is selected, clicking "Continue to email draft" automatically generates a pre-formatted "Email Draft - Client Portfolio Alert". This draft intelligently compiles relevant data regarding the chosen portfolio, such as recent movements in holdings, and formats it into a professional message body ready for the client. The advisor can then review and customize the recipient email, subject line, and the message content before sending, ensuring clear and timely communication of portfolio performance and strategic updates.



Watch our video on Intelvest:The Future of AI-Powered Investing|Transforming Investment Research & Portfolio Management for a thorough understanding and walkthrough.