

Case study

Investing Made Easy with
AI Assistant

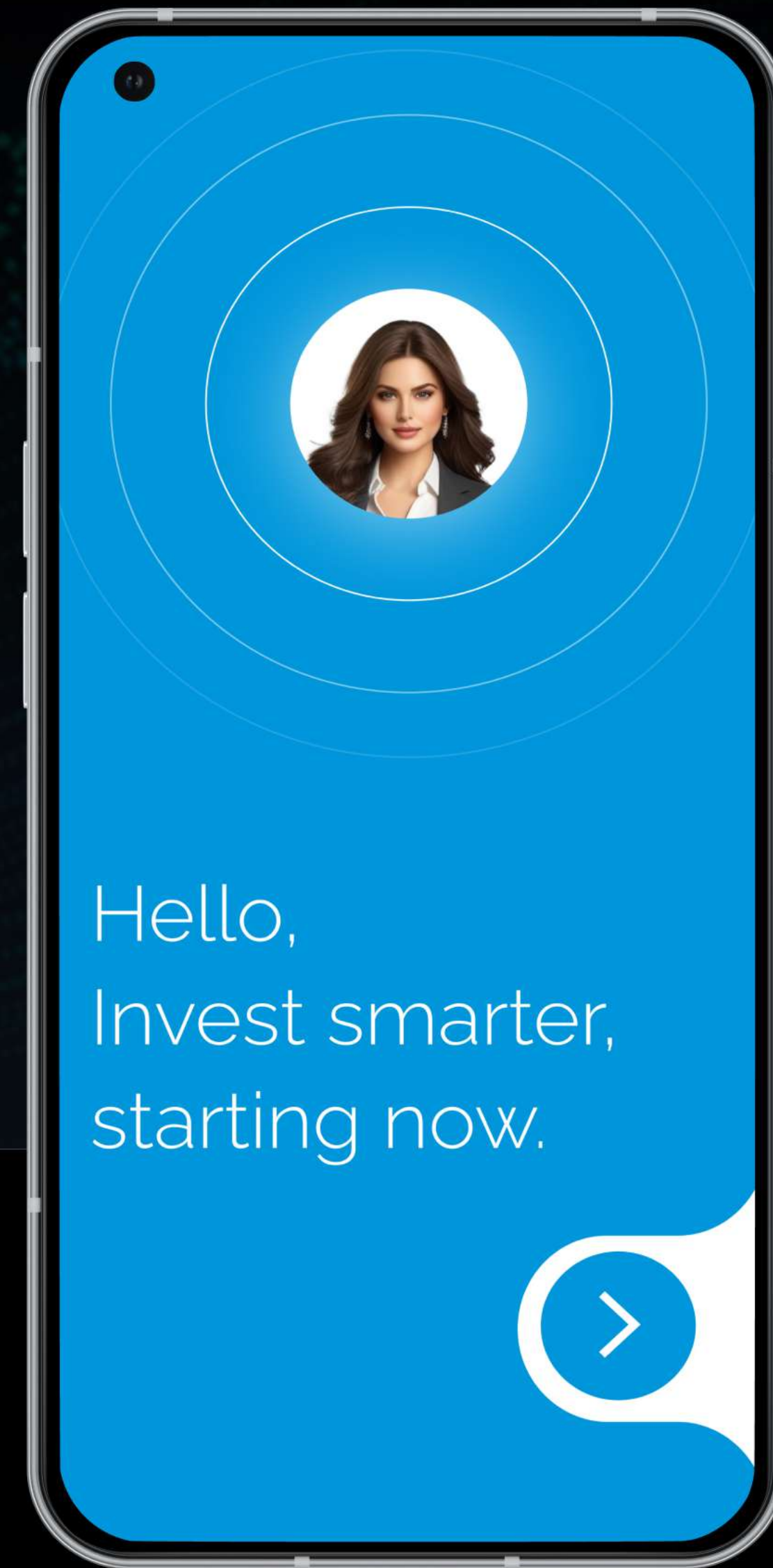
Learn

Explore

Invest

About the Client


The client is a leading trading platform in Colombia. They specialize in providing trading and investment solutions.



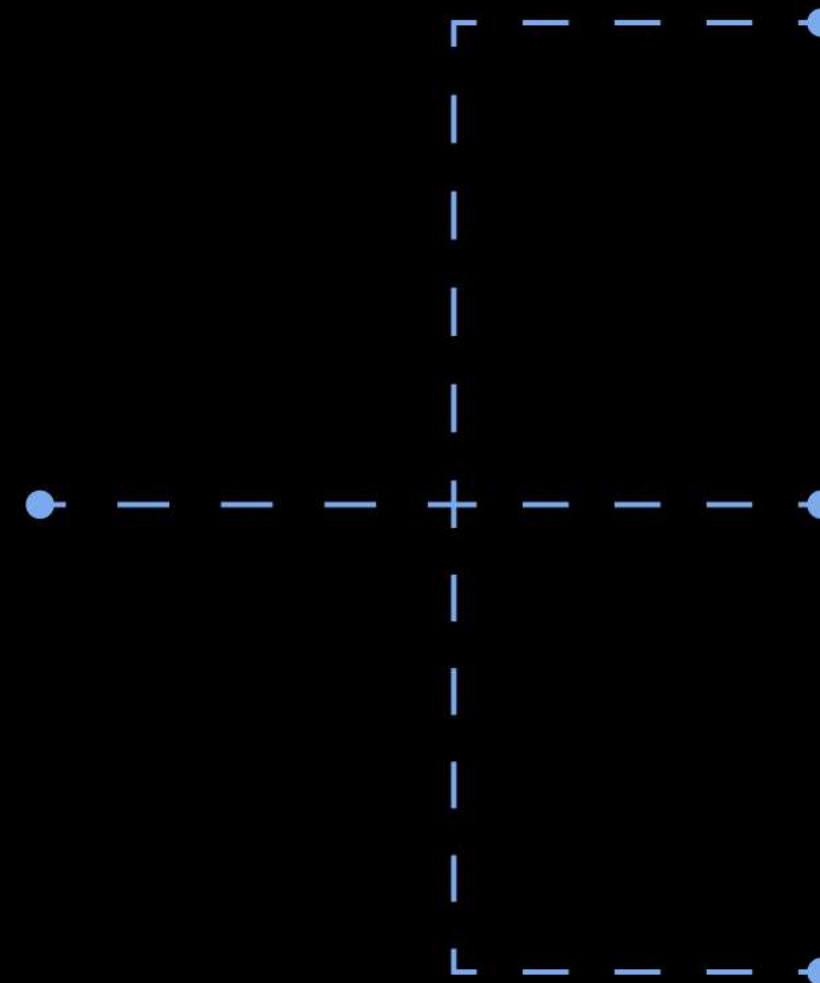
Challenge

The client was struggling to onboard aspiring investors without a strong financial background. At the same, existing users had a poor engagement rate.

Customer 01



Meet Nathan, a new investor



Nathan arrives on the trading platform and is bamboozled by the interface and jargon.



He asks the chatbot and is welcomed with a generic, scripted, and complicated answer.



The result? Churn and increased bounce rate.

Bill relies on different platforms for market updates and investment knowledge



This leads to confusion, hence poor engagement.



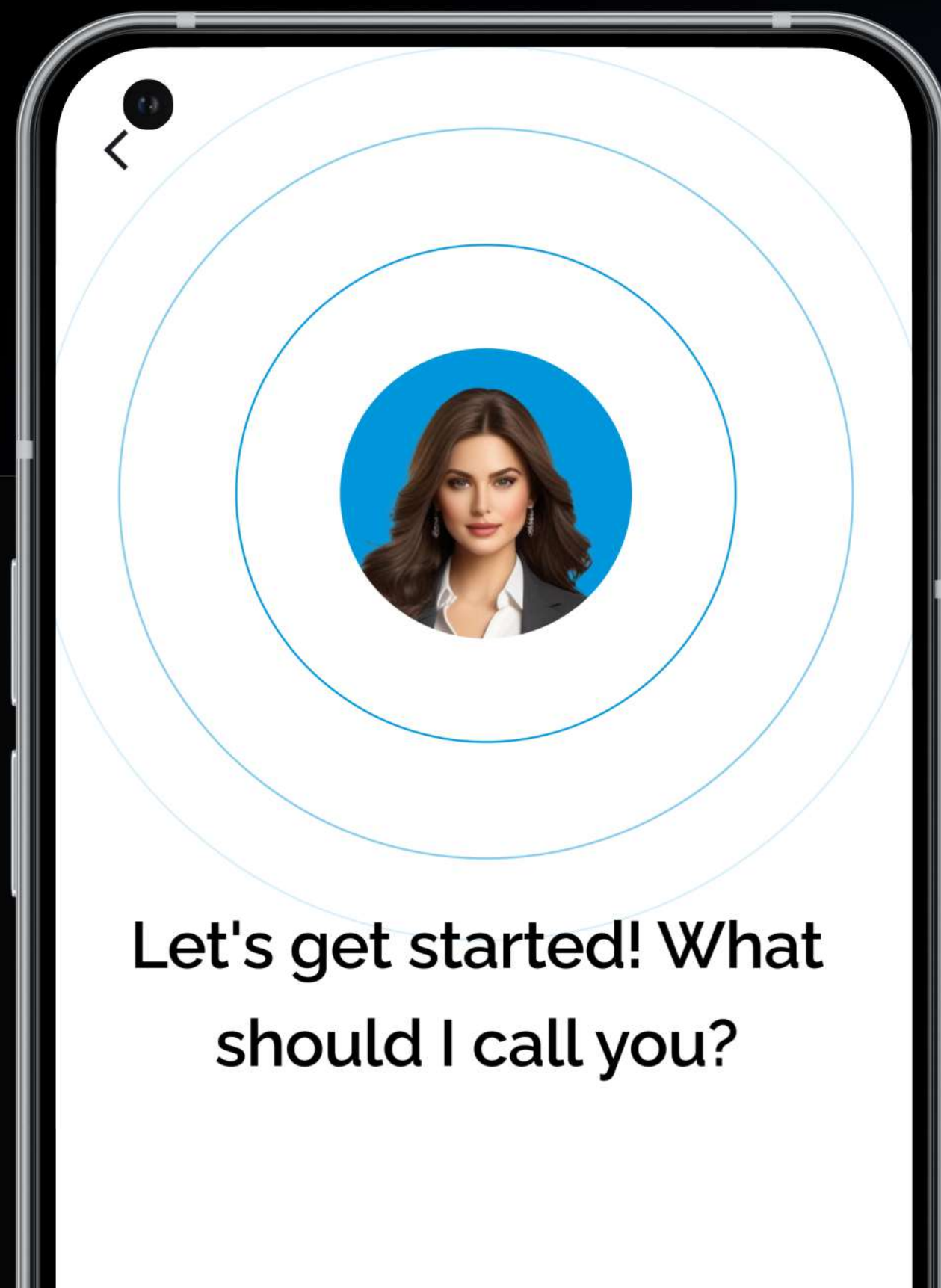
Customer 02



Meet Bill, an existing user on the brink of churning.

traditional chatbot drove away new investors with complicated answers.

Our Approach



We knew that the traditional chatbot drove away new investors like Nathan with complicated answers.

After further analysis, it dawned upon us that existing investors like Bill visited multiple sources to learn more about trading, leading to poor engagement. We decided to create a solution that provided all the necessary information in one place, hitting two birds with one stone. Easily accessible and digestible.

Lisa AI is a state-of-the-art AI agent that is all set to guide Nathan and Bill on their respective investing journeys.

When Nathan has a doubt on anything related to trading, he simply asks Lisa Leveraging LLMs, Lisa generates tailored answers to Nathan's learning style.

Say Hi to Lisa!

What changed for Nathan



Nathan wonders which is the right stock for him.



Lisa jumps in to help with real-time market updates.



Nathan is all set to make his first investment.



Lisa redirects him to the deposit page, successfully onboarding him to the platform.

Highly impressed, Nathan shares the app on his social media. People from different demographics download the app and are greeted by Lisa in their very own language.

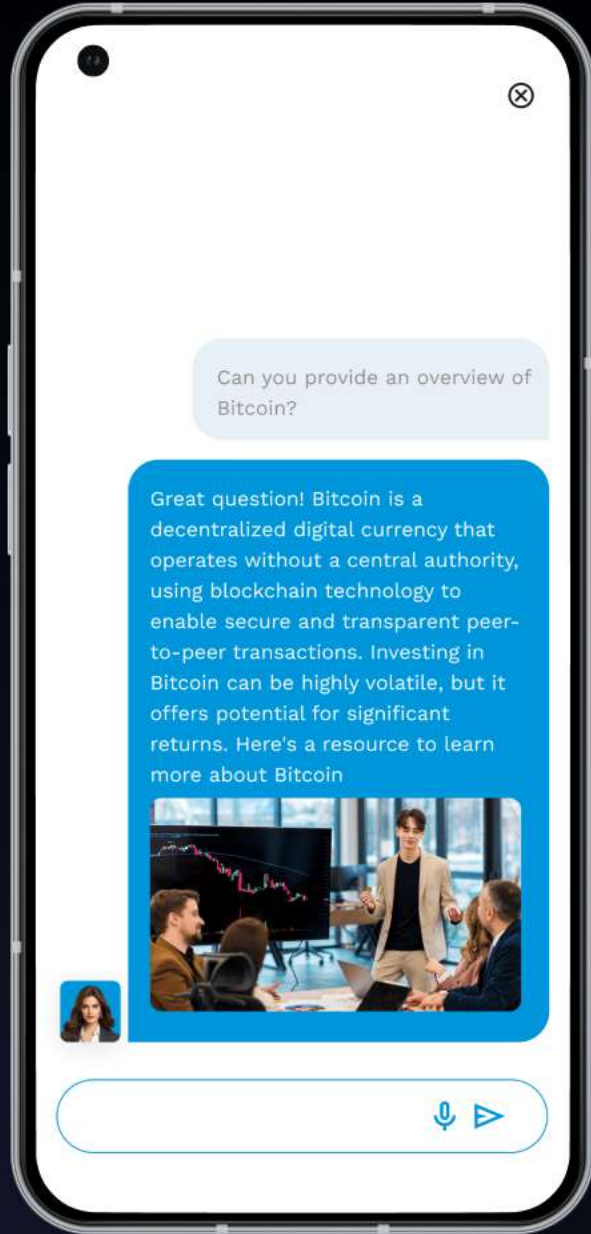
Using Natural Language Processing (NLP), Lisa can process multiple languages, including Spanish, English, Portuguese, Polish, Swedish, and Italian.

The Change

before



after



Lisa's integration proved to be a game changer for Nathan, Bill, and other investors.

Nathan would be put off by the generic and overly complicated replies from the chatbot.

With our intelligent agent Lisa, Nathan gets tailored responses that satisfy his newbie doubts.

*This personalized approach motivated Nathan to deposit funds and invest, resulting in **higher conversion rates**.*

before

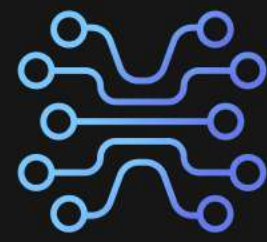
Bill had to minimize the app and visit third-party platforms to collect information.

after

Now he simply has to ask Lisa and get a personalized answer,

*personalized answers lead to an **increased engagement rate & decreased churn**.*

Technology



RAG
Architecture



LangChain



Facebook AI Similarity
Search (FAISS)



OPENAI



Voice Assistant



Python

Key Outcomes



Time-Saving

Lisa has streamlined the process of accessing financial information, saving valuable time.



Revenue Generation

Lisa has contributed to increased revenue by attracting and retaining customers through its personalized financial guidance



Cost Reduction

Lisa reduced operational costs by automating many customer service tasks.

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