



FIN 422 - Student Managed Investment Fund Group AI Assignment 5 AI Assistant/Chatbot Evaluation

This AI assignment must be done as a group, and all group members (unless there are unusual circumstances) will receive the same grade. The assignment must be uploaded to the D2L folder by the due date listed on the course schedule. Use the following title: "FIN 422 AI Ass. 1, Group X". Upload ONLY ONE assignment per group. All prompts (including the names of the AI models used) and (unedited) completions should be included in an appendix.

AI Assignment 5: AI Assistant/Chatbot Evaluation Assignment Overview

Evaluate the performance and effectiveness of your AI Assistant/chatbot after using it throughout the semester for firm-specific analysis. Provide detailed recommendations for improving its functionality and usefulness.

Evaluation Components

1. Performance Analysis
 - Document the types of queries that the AI Assistant handled well
 - Identify areas where the AI Assistant struggled or provided inaccurate information
 - Analyze the quality and reliability of financial analysis provided
 - Assess the clarity and usefulness of responses
 - Evaluate the Assistant's handling of complex or multi-part questions
2. Data Source Assessment
 - Review the effectiveness of chosen data sources
 - Identify any gaps in the knowledge base that became apparent during use
 - Evaluate which data sources proved most and least valuable
 - Assess the Assistant's ability to integrate multiple data sources
3. User Experience Review
 - Evaluate the communication style and response format
 - Assess ease of use and clarity of interactions
 - Review the Assistant's ability to maintain context in conversations
 - Analyze response times and processing efficiency

4. Improvement Recommendations

- Propose specific changes to the Assistant's basic identity and capabilities
- Suggest modifications to the communication style and response format
- Recommend additional or alternative data sources
- Outline potential technical improvements
- Provide examples of how these changes would enhance functionality
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Submission Requirements

Submit a comprehensive report that includes:

1. Detailed evaluation findings with specific examples
2. Quantitative metrics where applicable (success rates, accuracy percentages, etc.)
3. Sample interactions demonstrating both strengths and weaknesses
4. Structured improvement recommendations with justifications
5. Implementation suggestions for proposed changes