



A System and Method for Providing Financial Insights to a User

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Registered Patent Region	Patent/ Filing No.	Description	Issued Date	Status
Hong Kong	HK30108111	A System and Method for Providing Financial Insights to a User (一種用於向使用者提供財務見解的系統和方法)	1 Nov 2024	Granted
China	202610266682.3	基于人工智能的投资智能风险评估与决策辅助方法	12 Jun 2026	Published

Stage of Technology Transfer: Commercially Viable Technology/ Product Ready for Sale

Research Area: Large Language Model (LLM) and Retrieval Augmented Generation (RAG)

Abstract

A system for providing financial insights to a user comprising: a query gateway arranged to receive a query from a user, the query comprise one or more questions for financial information, a Retrieval Augmented Generation (RAG) system arranged to receive the query, process the query and generate a response to the query, an output module arranged to present the response to the user, and; wherein the response comprises financial insights in response to the query.