

Minsky™ StocksIQ

AI-Powered Investment Decision Intelligence

Overview

Minsky™ StocksIQ is an enterprise-grade, AI-driven investment decision intelligence platform engineered to convert fragmented market data into unified, decision-ready research. It combines a two-stage AI orchestration model with confidence-scored signal synthesis to continuously interpret technical, fundamental, sentiment, and flow data at scale — replacing static, siloed research tools with a governed, adaptive intelligence layer.

Built for the AI-first investor, trading desk, and research organization — offering LLM provider-agnostic architecture, explainable decision logic, and institutional-grade synthesis without institutional-grade cost.

Problem Statement

Modern investors, traders, and portfolio managers operate in an environment defined by extreme information overload, fragmented data sources, and rapidly shifting market dynamics. Technical, fundamental, sentiment, and derivatives data live in disconnected tools, forcing manual synthesis, slow reaction times, and heavy dependence on expensive institutional research terminals — while static outputs fail to adapt as markets move.

Platform Navigation & Modules

A single, unified workspace covering every stage of the research and decision workflow:

Dashboard	Market Scanner	Signal Engine	Portfolio Analytics
Watchlists	Alerts & Notifications	Research Reports	Ask Minsky™

Every symbol — equities, options, and index-level flows — moves through the same governed pipeline: AI-driven signal synthesis, confidence-scored output, and scenario-based risk framing, with full explainability at every stage.

Our Solution — How It Works

Minsky™ StocksIQ uses a two-stage AI orchestration model combined with confidence-scored validation to continuously synthesize market data into decision-ready intelligence.

Stage 1 – Multi-Source Signal Ingestion: An AI-driven analysis engine ingests technical, fundamental, sentiment, and options/institutional flow data and normalizes it into a unified signal layer.

Stage 2 – AI-Driven Synthesis & Scenario Generation: The platform fuses signals into scenario-based, decision-ready output with clear opportunity and risk zones, followed by confidence scoring for explainability and governance.

AI Capabilities

AI is embedded natively across Minsky™ StocksIQ — not a bolted-on add-on tier.

AI Signal Fusion – combines technical, fundamental, sentiment, and flow data into a single predictive intelligence layer

Fundamental & Business-Quality Scoring – AI-driven assessment of growth quality, valuation, and structural risk

Real-Time Sentiment Intelligence – continuously interprets market sentiment shifts as they develop

Options & Institutional Flow Awareness – detects derivatives and large-holder positioning ahead of price action

Scenario-Based Risk Mapping – generates opportunity and risk zones with clear, actionable boundaries

Confidence Scoring & Exception Routing – every output carries a confidence score; low-confidence signals route for review

Explainable Decision Logic – every signal and score is traceable to its underlying inputs

Ask Minsky™ – conversational AI assistant for natural-language queries against signals, portfolios, and research history

AI in Action

Signal Confluence Detection	Ask Minsky™	Risk Zone Alerts
The AI layer continuously scores technical, fundamental, and sentiment confluence across watchlists and surfaces high-conviction opportunities before they move.	Ask in plain English — “Which names in my watchlist show bullish confluence today?” — and get instant, explainable answers grounded in the underlying data.	Scenario-based risk and opportunity zones are monitored in real time, with AI-suggested adjustments so investors act in minutes, not hours.

Architecture

A modern, LLM provider-agnostic pipeline: an Angular frontend for monitoring and research review; a FastAPI orchestration backend; a provider-agnostic AI layer with multi-source data fusion; confidence-scored signal validation; and full audit and result aggregation logged to SQL Server before output review.

User →	1 Dashboard / Monitor / Review Angular Frontend	2 Orchestration FastAPI Backend	3 Multi-Source Data Fusion Technical, Fundamental, Sentiment, Flow
	4 AI Layer LLM Provider-Agnostic	5 Signal Validation & Confidence Scoring	6 Exception Handling & Retry Logic
	7 Metadata, Results, Audit SQL Server	8 Result Aggregation	9 Output Review & Dashboards Angular Frontend

User Journeys

Active Traders & Investors – watchlist monitoring, signal confluence review, scenario alerts

Portfolio Managers – portfolio analytics, risk-zone tracking, rebalancing decision support

Risk & Compliance Teams – audit and explainability review, model governance, exception oversight

Research Analysts – research report generation, sentiment tracking, and Ask Minsky™ natural-language queries

Security & Governance

Enterprise-grade security and governance are built into every layer of Minsky™StocksIQ.

Role-Based Access Control – field-level and portfolio-level permissions by role and team

Explainable Validation – confidence-scored checks applied after every AI synthesis, ensuring accuracy and repeatability

Encryption – end-to-end, at rest and in transit

Full Audit Logs – every signal, score, and research output tracked and retained

Data Residency Control – via On-Prem and Sovereign Cloud deployment

Tenant Isolation – strict row-level data separation between clients

Integration Ecosystem

Minsky™StocksIQ connects directly into market data feeds, brokerage and OMS platforms, and portfolio management systems — plus SQL Server for metadata and audit storage, and open REST APIs and webhooks for the broader research and execution toolchain.

How Research Runs



Why Enterprises Choose Minsky™StocksIQ

2-Stage	60–70%	Full	Any LLM
AI synthesis + confidence-scored output, not a single black-box pass	Reduction in research and analysis time vs. manual workflows	Explainable, audit-ready decision logic from signal to output	Provider-agnostic AI layer — no single-vendor lock-in

Minsky™ StocksIQ vs. Traditional Research Tools

Capability	Minsky™ StocksIQ	Traditional / Legacy Tools
Signal Synthesis	AI-fused technical, fundamental, sentiment, and flow signals	Siloed indicators reviewed manually across tools
Data Understanding	AI-driven semantic and contextual analysis	Relies on analyst tribal knowledge
Research Output	Scenario-based, decision-ready, continuously updated	Static reports, quickly outdated
Validation	Confidence-scored, applied to every signal	Inconsistent, often spot-checked only
Exception Handling	Confidence-scored routing to review queue	Manual discovery, often after the fact
Auditability	Full metadata, results, and audit log by default	Limited or bolted-on after the fact
Deployment Model	Cloud, On-Prem, or Sovereign Cloud	Typically fixed to a single environment

Deployment Options: Subscription Multitenant Cloud | White-Label on Client Server | On-Prem Servers | Sovereign Cloud Servers | Full Solution with Source Code

See Minsky™ StocksIQ in Action

Schedule a live walkthrough and discover AI-driven investment decision intelligence at a fraction of the cost of institutional research terminals.

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