

Home (<http://ipindia.nic.in/index.htm>) About Us (<http://ipindia.nic.in/about-us.htm>) Who's Who (<http://ipindia.nic.in/whos-who-page.htm>)
 Policy & Programs (<http://ipindia.nic.in/policy-pages.htm>) Achievements (<http://ipindia.nic.in/achievements-page.htm>)
 RTI (<http://ipindia.nic.in/right-to-information.htm>) Feedback (<https://ipindiaonline.gov.in/feedback>) Sitemap (<http://ipindia.nic.in/itemap.htm>)
 Contact Us (<http://ipindia.nic.in/contact-us.htm>) Help Line (<http://ipindia.nic.in/helpline-page.htm>)

[Skip to Main Content](#)

[\(http://ipindia.nic.in/index.htm\)](http://ipindia.nic.in/index.htm)

[\(http://ipindia.nic.in/inc\)](http://ipindia.nic.in/inc)

Patent Search

Invention Title	ARTIFICIAL INTELLIGENCE DRIVEN PORTFOLIO MANAGEMENT SYSTEM
Publication Number	20/2024
Publication Date	17/05/2024
Publication Type	INA
Application Number	202441036582
Application Filing Date	09/05/2024
Priority Number	
Priority Country	
Priority Date	
Field Of Invention	COMPUTER SCIENCE
Classification (IPC)	G06Q0040060000, G06Q0040040000, G06Q0040000000, G06N0003020000, G06F0003048470

Inventor

Name	Address	Country	Nat
Dr. Madhumala RB	Associate Professor, Dayananda Sagar Academy of Technology and Management, Bangalore, Pin: 560082, Karnataka, India.	India	Indi
Dr. Atul Upadhyay	Assistant Professor, Vivekananda Institute of Professional Studies, Outer Ring Rd, AU Block, Pitampura, New Delhi, Pin: 110034, Delhi, India.	India	Indi
Dr. Sunny Kumar Gond	Assistant Professor, Vivekananda Institute of Professional Studies, Outer Ring Rd, AU Block, Pitampura, New Delhi, Pin: 110034, Delhi, India.	India	Indi
Dr. Narendra Kumar Kamila	Professor, GITA Autonomous College (BIJU Patanaik University of Technology), Bhubaneswar, At/Po: Madanpur, Khordha, Pin: 752054, Odisha, India.	India	Indi
Mr. Paladugu .Yogeswara Prasad	Associate Director – Projects, Cognizant Technology Solutions India Pvt Ltd, Building 12A, Raheja Mindspace IT Park, Mindspace Madhapur Rd, HITEC City, Hyderabad, Pin: 500081, Telangana, India.	India	Indi
Dr. K. Karthikeyan	Assistant Professor, Department of Corporate Secretaryship and Accounting & Finance, Faculty of Science and Humanities, SRM Institute of Science and Technology, Kattankulathur Campus, Chengalpattu District, Pin: 603 203, Tamil Nadu, India.	India	Indi
Mr. U Soma Naidu	Assistant Professor, Department of Electronics and Communication Engineering, Institute of Aeronautical Engineering, Dundigal, Hyderabad, Pin: 500043, Telangana, India.	India	Indi
Mr. P.P.M. Prasad	Assistant Professor, Bapatla Engineering College, Mahatamgipuram, Bapatla, Pin:522102, Andhra Pradesh, India.	India	Indi
Ms. Sukhpreet Kaur	Assistant Professor, PMLSD Business School, Sector, 32C, Pin: 160030, Chandigarh, India.	India	Indi
Mr. Pankaj	Research Scholar, Desh Bhagat University, Amlah Road, Mandi Gobindgarh, Mohali, Pin: 147301, Punjab, India.	India	Indi
Dr. K. Sivaperumal	Assistant Professor, Department of Commerce Faculty of Science and Humanities, SRM Institute of Science and Technology, Kattankulathur, Chennai, Pin: 603203, Tamilnadu, India.	India	Indi
Dr. Harikumar Pallathadka	Director and Professor, Manipur International University, Ghari, Imphal, Imphal West, Pin: 795140, Manipur, India.	India	Indi

Applicant

Name	Address	Country	Nat
Dr. Madhumala RB	Associate Professor, Dayananda Sagar Academy of Technology and Management, Bangalore, Pin: 560082, Karnataka, India.	India	Indi
Dr. Atul Upadhyay	Assistant Professor, Vivekananda Institute of Professional Studies, Outer Ring Rd, AU Block, Pitampura, New Delhi, Pin: 110034, Delhi, India.	India	Indi
Dr. Sunny Kumar Gond	Assistant Professor, Vivekananda Institute of Professional Studies, Outer Ring Rd, AU Block, Pitampura, New Delhi, Pin: 110034, Delhi, India.	India	Indi
Dr. Narendra Kumar Kamila	Professor, GITA Autonomous College (BIJU Patanaik University of Technology), Bhubaneswar, At/Po: Madanpur, Khordha, Pin: 752054, Odisha, India.	India	Indi
Mr. Paladugu .Yogeswara Prasad	Associate Director – Projects, Cognizant Technology Solutions India Pvt Ltd, Building 12A, Raheja Mindspace IT Park, Mindspace Madhapur Rd, HITEC City, Hyderabad, Pin: 500081, Telangana, India.	India	Indi
Dr. K. Karthikeyan	Assistant Professor, Department of Corporate Secretaryship and Accounting & Finance, Faculty of Science and Humanities, SRM Institute of Science and Technology, Kattankulathur Campus, Chengalpattu District, Pin: 603 203, Tamil Nadu, India.	India	Indi
Mr. U Soma Naidu	Assistant Professor, Department of Electronics and Communication Engineering, Institute of Aeronautical Engineering, Dundigal, Hyderabad, Pin: 500043, Telangana, India.	India	Indi
Mr. P.P.M. Prasad	Assistant Professor, Bapatla Engineering College, Mahatamgipuram, Bapatla, Pin:522102, Andhra Pradesh, India.	India	Indi
Ms. Sukhpreet Kaur	Assistant Professor, PMLSD Business School, Sector, 32C, Pin: 160030, Chandigarh, India.	India	Indi
Mr. Pankaj	Research Scholar, Desh Bhagat University, Amlah Road, Mandi Gobindgarh, Mohali, Pin: 147301, Punjab, India.	India	Indi
Dr. K. Sivaperumal	Assistant Professor, Department of Commerce Faculty of Science and Humanities, SRM Institute of Science and Technology, Kattankulathur, Chennai, Pin: 603203, Tamilnadu, India.	India	Indi
Dr. Hari Kumar Pallathadka	Director and Professor, Manipur International University, Ghari, Imphal, Imphal West, Pin: 795140, Manipur, India.	India	Indi

Abstract:

The invention relates to a system and method that integrates cutting-edge artificial intelligence (AI) algorithms to optimize investment portfolios in dynamic financial markets by collecting and analyzing diverse data sources including historical market data, real-time financial information, economic indicators, and investor-specific data. AIDPMS generates personalized investment strategies tailored to individual investor goals and risk preferences. Through modules such as AI Analysis and Prediction, Portfolio Optimization, Risk Management, and Dynamic Adjustment, the system continuously adapts to changing market conditions, maximizes returns, and minimizes risk exposure. AIDPMS represents a paradigm shift in investment management, offering investors and financial professionals a scalable and efficient solution for navigating the complexities of modern financial markets and achieving superior portfolio outcomes.

Complete Specification

Description:The present invention relates generally to the field of financial technology (fintech), and more particularly, to an Artificial Intelligence Driven Portfolio Management System. The invention pertains to systems and methods for managing investment portfolios using artificial intelligence techniques to analyze market data, investor preferences, risk tolerance, and other relevant factors. The system optimizes portfolio performance, minimizes risk, and dynamically adapts investment strategies to changing market conditions.

BACKGROUND OF THE INVENTION

The following description of related art is intended to provide background information pertaining to the field of the disclosure. This section may include certain aspects of the art that may be related to various features of the present disclosure. However, it should be appreciated that this section is to be used only to enhance the understanding of the reader with respect to the present disclosure, and not as admissions of prior art.

In today's complex financial markets, managing investment portfolios efficiently and effectively presents significant challenges to investors and financial professionals alike. Traditional portfolio management approaches often rely on static strategies based on historical data and simplistic models, which may fail to adapt to dynamic market conditions or capture subtle trends and patterns.

The emergence of artificial intelligence (AI) and machine learning (ML) technologies has revolutionized various industries, including finance. AI-driven approaches offer the potential to enhance investment decision-making processes by analyzing vast amounts of data, identifying complex patterns, and generating actionable insights in real-time.

[View Application Status](#)


Terms & conditions (<http://ipindia.gov.in/terms-conditions.htm>) Privacy Policy (<http://ipindia.gov.in/privacy-policy.htm>)

Copyright (<http://ipindia.gov.in/copyright.htm>) Hyperlinking Policy (<http://ipindia.gov.in/hyperlinking-policy.htm>)

Accessibility (<http://ipindia.gov.in/accessibility.htm>) Archive (<http://ipindia.gov.in/archive.htm>) Contact Us (<http://ipindia.gov.in/contact-us.htm>)

Help (<http://ipindia.gov.in/help.htm>)

Content Owned, updated and maintained by Intellectual Property India, All Rights Reserved.

Page last updated on: 26/06/2019

