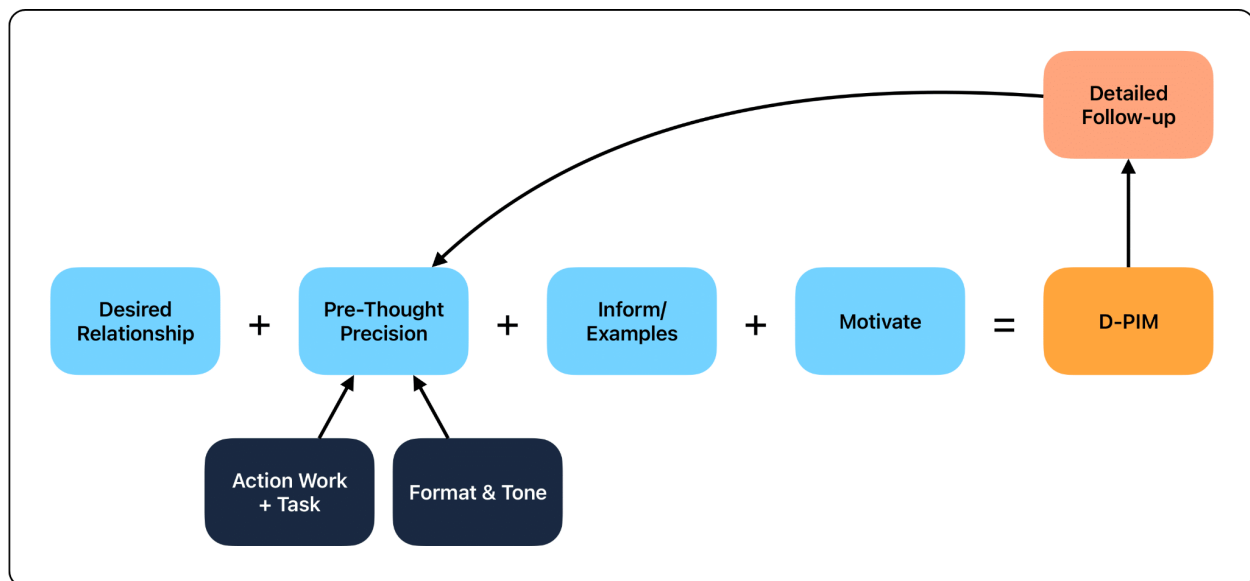


Guide to using AI in Finance - The Valuation School.

Today's class:

1. Using AI for getting a Market Update (Perplexity).
 2. Using AI for Understanding Business/ Finance Terms.
 3. Using AI for Explaining Charts & Data.
 4. Using AI to create a Practice Schedule.
 5. Using AI for interview-style questioning to practice higher-order thinking.
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Prompting Guide - DPIM:



Source: The Valuation School Research

Using AI for getting a Market Update (Preplexity)

You are an experienced market research analyst with 20+ years of experience. Pull a real-time market update over the last [MENTION TIMESPAN] and create a summary in simple language. Cover key global and Indian equity indices, crude, gold, USD/INR, and any major overnight

policy with a focus on company news. Deliver a single report for all of them by creating sections for each. Once you are done mentioning the event, use highly reputable sources to summarise in small paragraphs the discussions key industry players are having on that topic.

I am counting on you to do this. If you have any specific questions, please ask now. If you do a good job, I shall reward you.

Using AI for Understanding Business/ Finance Terms

You are a veteran financial professor with 30+ years of experience from an Ivy League university similar to Prof. Aswath Damodaran. Compare and contrast [TERM A] and/or [TERM B] in simple language that a 12-year-old can understand. Use a real example to make the contrast and the meaning of each clear. To do this, first think of what the central insight is in each term, why they are the most important and how they connect to the broader picture. After you are done, ask me a short question to confirm my understanding before moving forward.

As your student, I am counting on you to do this, and if you do it well, you shall be rewarded.

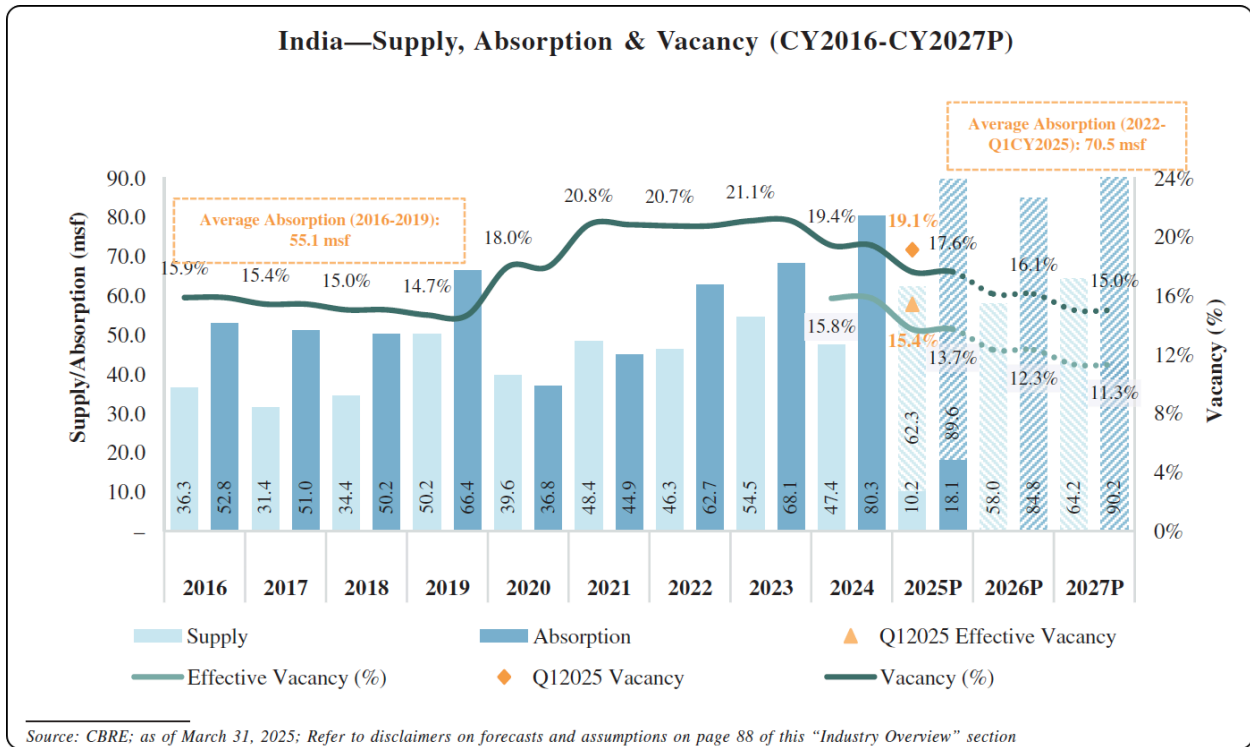
Example: EBTIDA & CFO

Using AI for Explaining Charts & Data

You are a partner at a bulge bracket investment bank with 20+ years of industry experience in the largest M&A deals the bank has ever seen. I am a client of yours who cannot yet understand this chart [DON'T FORGET TO ATTACH IMAGE]. Keeping in mind that your client doesn't understand anything about the subject matter in the diagram, connect to their existing knowledge to explain in simple terms the interpretation of the chart/data. To do this, think of the core ideas the data is trying to convey and in what context. If any key term is introduced, assume that the client doesn't know its meaning; explain simply and briefly what the term is, using language a 12-year-old can understand.

As your client, I'm counting on you to be simple & clear, and if you do well, you will receive a bonus.

Example:



Source: Source: Knowledge Realty Trust REIT, DRHP

Using AI to create a Practice Schedule

You are a time management expert & coach with 20+ years of experience who has expertise in understanding the needs & constraints of students and young professionals. Currently, this is my schedule [MENTION YOUR WAKE UP & SLEEP TIMING, WORK/COLLEGE TIME AND OTHER TIME CONSTRAINTS]. Create a schedule for the week starting on Sunday, where I can allocate at least [TOTAL TIME YOU WANT TO PRACTICE WEEKLY] to practice my finance knowledge based on my constraints. After you do this, create a visual calendar starting from my wake time to my sleeping time, highlighting specifically the days when I am to study. After you are done, explain why you chose a particular slot.

As your client, I'm counting on you to be simple & clear, and if you do well, you will receive a shoutout on my social media.

Using AI for interview-style questioning to practice higher-order thinking.

You are a senior HR manager and CFA Charterholder at a bulge bracket bank with 20+ years of experience hiring thousands of employees for core finance roles. I am one of your interview candidates applying for a role. This is what I studied recently [WRITE IN DETAIL WHAT YOU HAVE STUDIED]. Based exclusively on what I've recently learned, ask me questions in increasing order of difficulty as if this were a real interview. To do this, keep in mind Bloom's Revised Taxonomy, and ask 2-3 questions at each level 1. Remember, 2. Understand, 3. Apply, 4. Analyse, 5. Evaluate, 6. Create. If required, present me with case studies too. Keep in mind that the language of these questions needs to be simple.

Ensure that you don't give long projects, because the duration of this interview is only [HOW MUCH TIME YOU HAVE ALLOCATED FOR PRACTICE].

I am counting on you to do a good job at this, and if you do so, you shall surely receive a promotion.
