



Generative AI for Asset Managers Workshop Recording

Unleash the Potential of Generative AI in Asset Management: Discover, Learn, and Apply!

The recorded content from our enlightening 2-day workshop held from September 30 to October 1, 2023, is now available for purchase. Hosted by industry stalwarts Dr. Ernest Chan, Dr. Roger Hunter, Dr. Hamlet Medina, and featuring an insightful keynote by Dr. Lisa Huang, this workshop meticulously explores the deployment of Large Language Models (LLMs) in asset management, particularly focusing on crafting robust discretionary trading strategies.

CLICK HERE TO PURCHASE THE GEN AI WORKSHOP FOR \$899.00 USD

Learning Goals

A thorough understanding of Generative AI fundamentals and advanced techniques, tailor-made for asset management applications.

Practical acumen to design, evaluate, and deploy LLMs for innovative trading strategies.

An in-depth exploration of prompt engineering and risk mitigation strategies associated with LLMs.

Strategies to enhance trading methodologies with sentiment analysis employing LLMs.

Generative AI for Asset Managers is a 2-day online workshop to demonstrate how we construct a discretionary trading strategy using a LLM. We will demonstrate how asset managers and traders can use Google's BARD to turn unstructured data such as the audio feed of the Federal Reserve's Chair's speech into high frequency trading signals and backtest such strategies, all at minimal cost. Participants can explore and experiment with variations and improvements on the basic code, as well as other use cases of LLM for asset management.



Workshop Speakers



Host:

Dr. Ernest Chan

Founder and CEO of
Predictnow.ai



Host:

Dr. Roger Hunter

CTO of QTS Capital
Management



Host:

Dr. Hamlet Medina

Chief Data Scientist
at Criteo



Keynote Speaker:

Dr. Lisa Huang

Head of AI Investment
Management, Fidelity
Investments.

Workshop Overview

Day 1:

Delve into Generative AI and LLMs in Asset Management

- Comprehensive exploration of Large Language Models (LLMs) like BARD, ChatGPT, and their manifold applications in the finance sector.
- Harnessing the power of LLMs to structure discretionary trading strategies efficiently.
- Hands-on session: Transforming unstructured data into actionable high-frequency trading signals.

Day 2:

Advanced Techniques and Real-World Applications

- Fireside Chat with Lisa Huang
- Extensive coverage on prompt engineering and strategies to mitigate risks inherent to LLMs.
- Augmenting trading strategies with nuanced sentiment analysis using LLMs.
- Hands-on exercise: Backtesting trading strategies and a brainstorming session on LLM's potential to revolutionize asset management practices.

Intended Audiences

Asset Managers
Venture Investors

Entrepreneurs
Product Developers

Regulators
Finance & AI Researchers



Testimonials

Behnam Javanparast

PhD, Chief Executive Officer
yiyaniQ

"This workshop provided me with a great overview of current LLM technologies, their use in Financial Industry, and the challenges one might face in using them. Hands-on portion was very useful to get started with recent tools in the space. The fireside chat gave me the perspective of decision-makers in established financial institutions on the topic. Overall, after the workshop one would know where to go next to keep exploring."

Michiel Vos

Manager AI Startups & Scaleups,
Vector Institute

"The Generative AI for Asset Managers Workshop provided a comprehensive and insightful overview of how to leverage Large Language Models in asset management. The hosts, Dr. Ernest Chan, Dr. Hamlet Medina and Dr. Roger Hunter, were exceptionally knowledgeable, breaking down complex concepts into digestible modules. The workshop was particularly beneficial for understanding how to turn unstructured data, such as Federal Reserve Chair speeches, into actionable trading signals. The breakout sessions allowed for hands-on experimentation and were invaluable for brainstorming improvements and new use-cases."

Estelle Inack

PhD, Chief Technology Officer
yiyaniQ

"Thanks, first of all, for organizing such a great workshop. I liked the hands-on part with the code; having such a practical application was insightful. I also enjoyed the Fireside chat; it was pretty informative. The first lecture on Sunday was a little long, though, so we had to rush later on through the second part of the program, but besides that, I did enjoy the workshop."



Course Outline

Lesson 1: Large Language Models (LLMs) & Generative Pre-trained Transformers (GPT)

- Introduction to LLM: BARD, ChatGPT, and other large language models
- Typical Applications of LLMs
- How LLMs work
- Using BARD/PaLM on the web through their API

Lesson 2: Building Applications

- Overview of Prompt Engineering
- Building applications such as text generation, summarization, etc.
- Few-shot learning with BARD
- Introduction to embeddings
- Overview of the BARD embeddings API and its usage

Lesson 3: Risks Associated with LLMs

- Understanding main risks with LLMs, such as, hallucinations, bias, consent and security
- Methods for reducing the risks of Hallucinations, such as, retrieval augmentation, prompt engineering, and self-reflection
- Methods to detect and address hallucinations, including reinforcement learning from human feedback (RLHF) and model-based approaches

Lesson 4: Using LLMs for trading Federal Reserve Chair's speeches

- Why we chose the BARD family among the many available LLMs
- Evaluating BARD's native performance
- Improving performance with embeddings
- Worked example: computing sentiment ratings on public companies using embeddings
- Test data: Video archives of the press conferences of the Federal Reserve Chair.
- Backtesting a discretionary trading strategy using the sentiment output of a LLM.

Lesson 5: Deploying LLMs in Production

- Best Practices for Deploying LLMs in Production
- Overview of alternative generative models such as ChatGPT, BART, Cohere, Alpaca, etc.



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FAQ

How do I purchase the recordings?

Click [here](#) to be taken to our secure payment processing platform, Stripe, where you'll be able to use your preferred payment of choice to purchase the recordings.

What's included in the purchase of this workshop?

For \$899.00 USD, you will gain access to 2 video recordings, one from each day of the original workshop, plus the original source codes. These videos offer a combined total of 6 hours of educational content that you'll be able to download immediately.

Who can I contact for more help?

For any inquiries or support, please email us at info@predictnow.ai