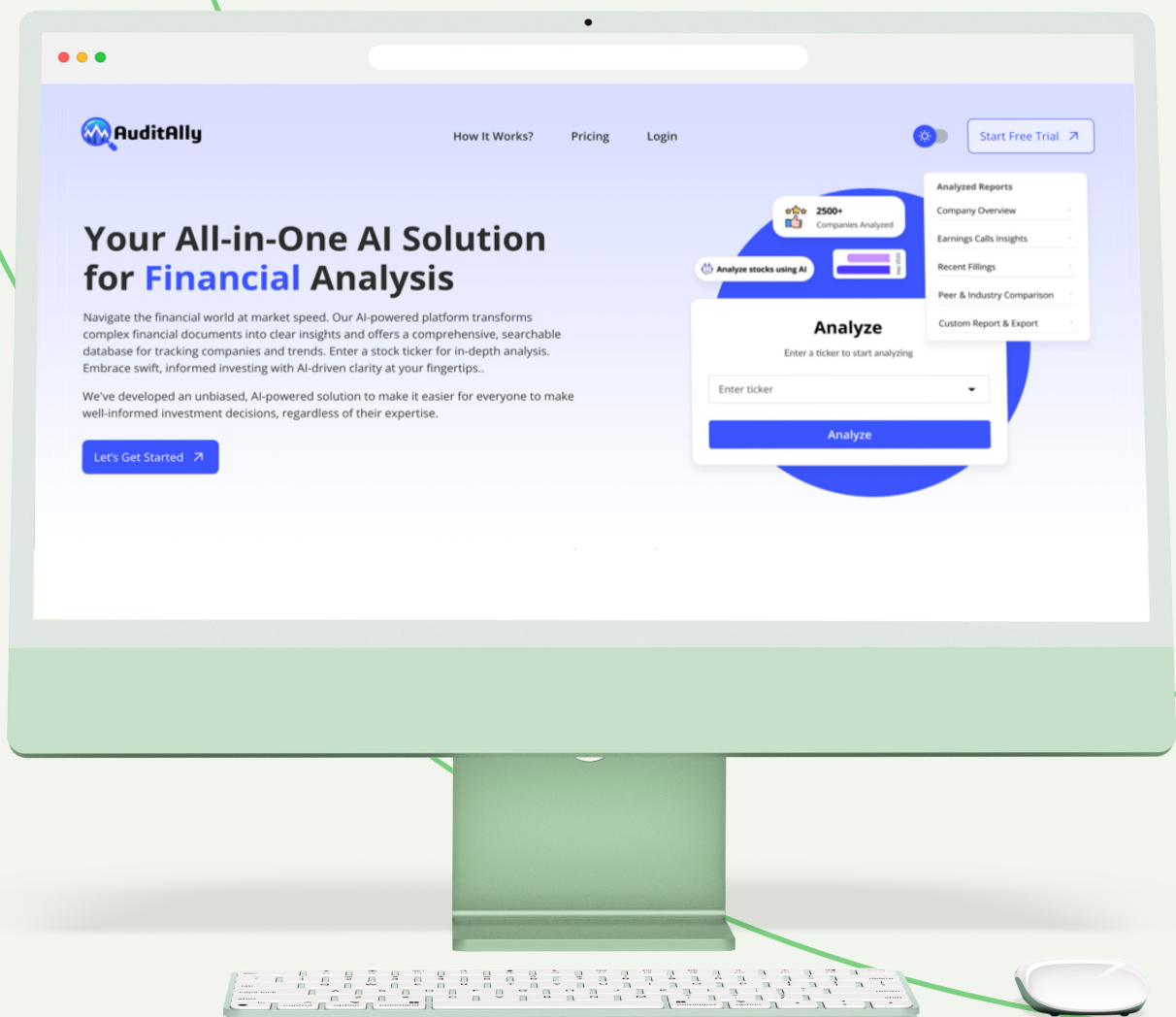




CASE STUDY

Building an AI-Powered Financial Analysis Tool for Smarter Investing



Audit Ally is revolutionizing how investors analyze the stock market. Their platform transforms complex financial data into clear, actionable insights for traders, investors, and business professionals.

The company built something impressive: a system that automatically analyzes quarterly reports, extracts key data points, and generates predictive graphs. Users can upload 10-Q filings and other financial documents, then get sentiment scores, trading volumes, and stock performance predictions in return.

What makes their platform unique is the seamless workflow they created. Companies upload their quarterly reports, and Audit Ally's advanced algorithms categorize different types of filings while extracting essential data points. The system then generates insightful graphs that predict stock trends based on the extracted data.

I. The growth opportunity

Audit Ally was rapidly gaining attraction from investors, traders, and financial analysts. This created a necessity for implementing technical enhancements across all facets of their current platform.

- ✧ The team wanted to build an AI-driven sentiment analysis module capable of interpreting earnings calls. This would help users detect the confidence, enthusiasm, and caution behind the speaker's language
- ✧ For broader market coverage, Audit Ally sought to expand their existing database by integrating it with credible financial sources. Such expansion would allow users to conduct a more comprehensive analysis.
- ✧ A larger user base meant a greater burden on their API. The team wanted to optimize the performance and maintenance of real-time insights without overloading their systems.



2. The problem statement

Audit Ally needed a powerful AI-driven platform to support its growing community of investors, analysts, and portfolio managers with fast and reliable financial insights. The solution had to process complex financial documents like SEC filings and analyze high volumes of earnings calls in real time while maintaining accuracy and clarity.

To deliver a more comprehensive analysis experience, Audit Ally aimed to expand its data sources, improve search and filtering capabilities, and provide clear, visual summaries of key financial metrics. With increasing demand, the platform also needed to scale efficiently, reduce latency, streamline CRM integration, and support secure subscription management within a seamless user interface.

Key priorities included:

Real-time sentiment analysis

Accurately detect tone, confidence, and caution in earnings calls, helping users understand the speaker's intent and market sentiment instantly.

Processing large documents

Break down and analyze long-form SEC filings without hitting token limits, ensuring complete and actionable insights

Low-latency performance

Deliver insights within seconds during live events, even under heavy data loads, to support time-sensitive investment decisions.

Expanded financial data coverage

Integrate credible external sources to enrich the existing database and enable more detailed company and market analysis.



Advanced filtering and benchmarking

Allow users to compare key financial indicators across companies, supported by 5-quarter historical data.

User-centric experience

Simplify access to complex financial data through categorized content, smart visualizations, and a clean, intuitive interface.

Subscription and CRM integration

Enable seamless subscription management and align customer data across sales, marketing, and product workflows.

3. The strategic partnership

Prixite joined Audit Ally's development team to help bring their ambitious roadmap to life. Rather than overhauling their existing system, we focused on strategic enhancements that would amplify what was already working well.

AI-Powered Sentiment Analysis Module

We developed a sophisticated sentiment analysis module for earning calls that went far beyond basic text processing. The module integrated the latest AI models specifically designed for financial context, providing users with meaningful insights that previously required manual analysis.

We trained the AI model with specialized prompts to interpret financial jargon. Users can now gain direct insight into whether other investors are feeling bullish or bearish about the current market. Making them less reliant on manual analysis.



Platform Integration and Expansion

We successfully integrated Audit Ally with multiple external financial data providers, dramatically expanding the platform's coverage. This integration required careful attention to compatibility across different data formats and ensuring seamless synchronization with the existing system.

The expansion created a unified experience where users could access broader market information without complexity. We ensured compatibility with a wider range of financial instruments and markets while maintaining the platform's intuitive interface.

User Experience Enhancement

We redesigned the company overview section to improve how users accessed detailed company insights. The new design made it more intuitive for users to navigate and extract relevant information quickly.

Beyond the overview section, we engineered a customizable user dashboard with advanced UI/UX designs. This incorporated configurable settings tailored for individual users, creating a scalable and flexible experience across the entire platform.

Performance Optimization

We implemented scheduled Cron jobs to optimize API utilization and reduce unnecessary third-party API calls. This strategic approach enhanced the platform's efficiency while maintaining data accuracy and reducing operational costs.

We also conducted a comprehensive codebase enhancement, improving maintainability and scalability without disrupting the platform's core functionality.



4. The tech involved

Our collaboration utilized a robust and modern tech stack:



Backend Infrastructure

Django provided robust server-side functionality for complex financial data processing, while PostgreSQL ensured reliable data management and query performance.



Frontend Development

ReactJS powered the responsive user interfaces, with RTK Query handling efficient state management and data synchronization across the platform.



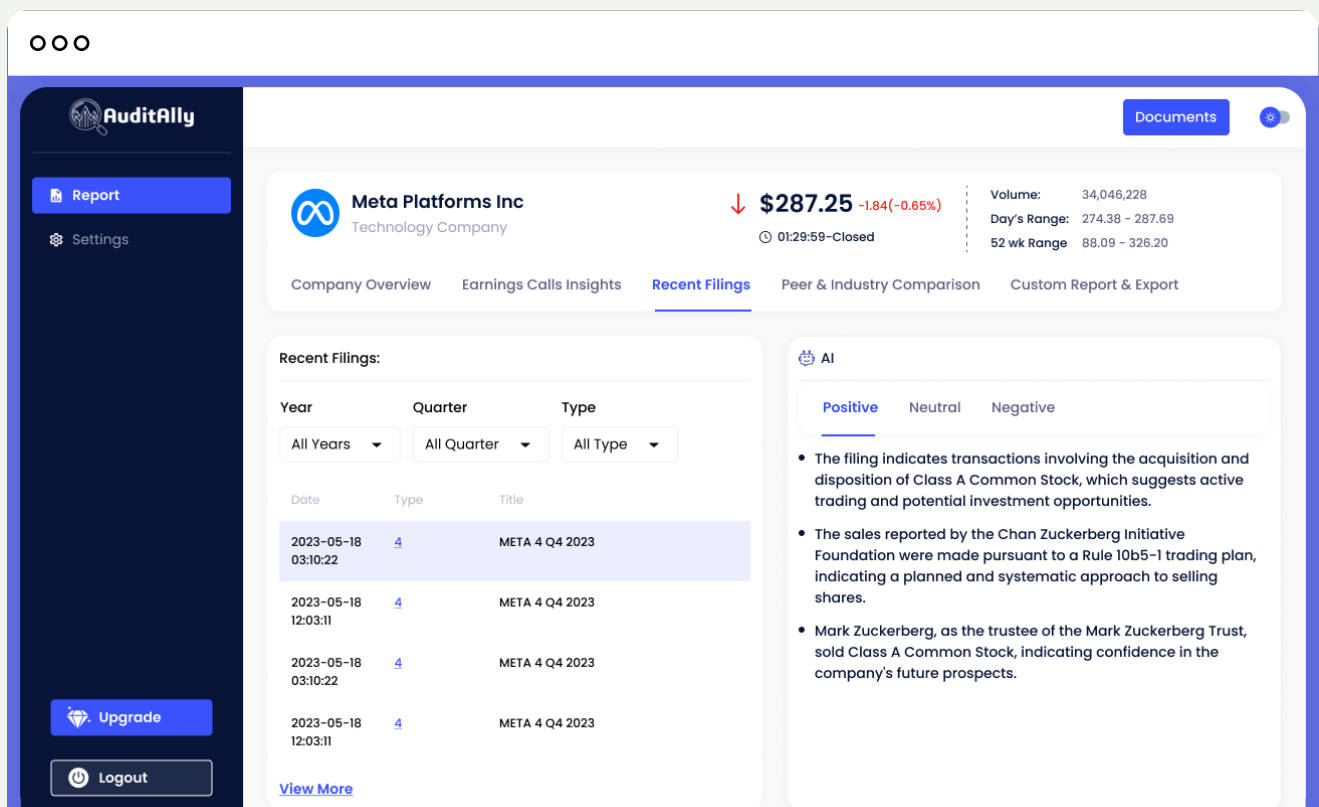
AI Integration

We integrated OpenAI's capabilities for advanced analytical features, carefully managing API calls to balance performance with cost efficiency.



Automation

Cron jobs handled scheduled tasks and optimized resource usage, ensuring the platform could scale efficiently as user demand grew.





5. The development process

While the development posed huge challenges, our motivation to scale Audit Ally's AI performance was equally strong. The partnership emphasized quality, communication, and shared accountability throughout the development cycle.

Clean Code: We implemented comprehensive peer review processes where team members actively evaluated and provided constructive feedback on code. This approach ensured high standards while facilitating knowledge exchange across both teams.

Communication: Regular team meetings promoted open communication and alignment on project objectives. These sessions served as valuable forums for sharing updates, addressing challenges, and making collective decisions.

Project Management: We utilized a centralized platform for task management and collaboration. This provided transparency in task progress and created accountability throughout the development process.

Quality Assurance: Our comprehensive software quality assurance services included rigorous testing methodologies that identified and addressed potential issues before they impacted users.



6. Results!

The collaboration delivered measurable improvements that enhanced both user experience and platform capabilities.

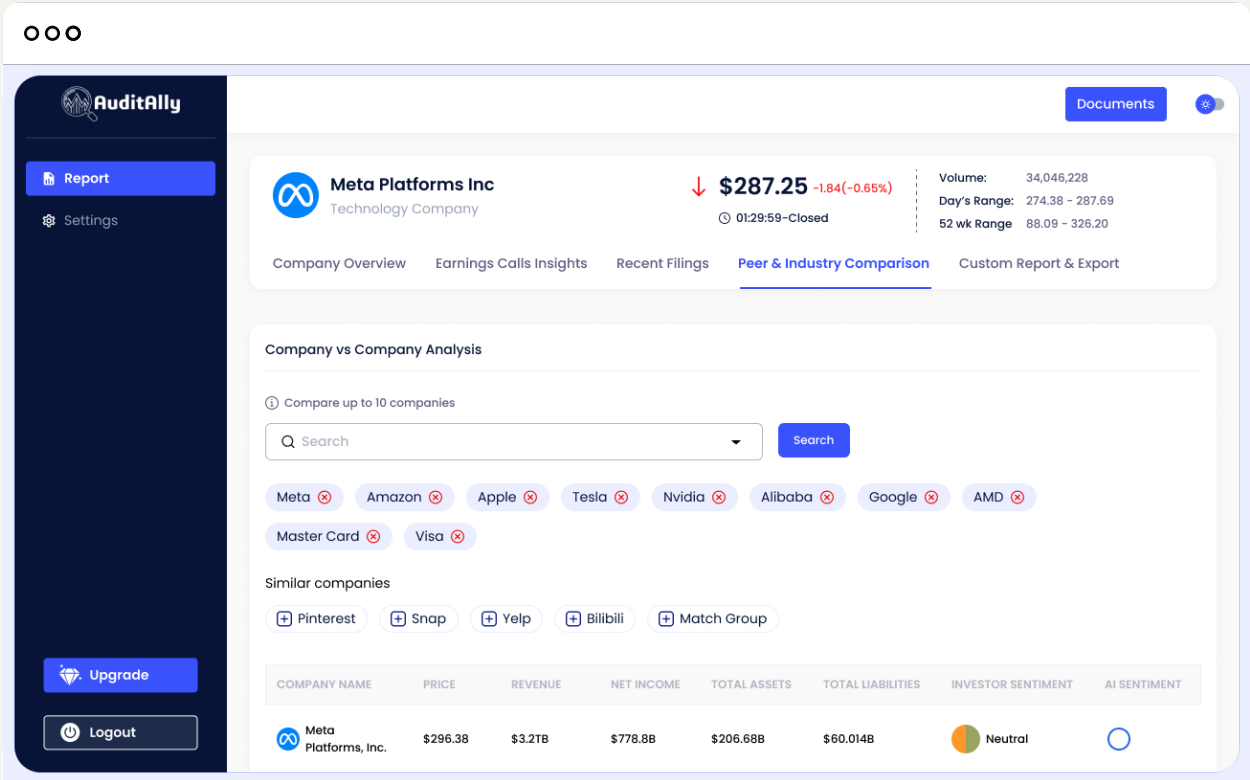
Advanced Analytics: The new AI sentiment analysis module provided users with automated insights that previously required manual research and analysis. Users could now get sophisticated sentiment scoring for earning calls with just a few clicks.

Enhanced Performance: API optimizations and smart caching reduced load times and improved overall platform responsiveness. Users experienced faster data retrieval and more efficient workflows.

Expanded Coverage: Integration with external data providers gave users access to broader financial markets and instruments. This expansion positioned Audit Ally as a more comprehensive solution for diverse investment strategies.

Improved User Experience: The redesigned company overview section and customizable dashboards made it easier for users to access the information they needed. The platform became more intuitive and user-friendly without sacrificing analytical depth.

Scalable Foundation: The enhanced codebase and optimized architecture created a solid foundation for Audit Ally's continued growth and feature expansion.



7. So, what do they think?

"Been working on a large project with Ali and his team for the last few months, everything's been going great. Great communication and progress. No complaints."

Dylan Gluffrida, Director



8. TL;DR

Today, Audit Ally stands as a leader in AI-powered financial analysis, delivering sophisticated insights that modern investors need. The platform successfully combines user-friendly design with powerful analytical capabilities, setting new standards in the financial analysis tools market.

The partnership achieved exactly what both companies envisioned: a more powerful platform that serves users better while positioning Audit Ally for long-term success in the competitive fintech landscape. The enhanced capabilities and scalable architecture ensure Audit Ally can continue innovating and expanding their market presence.



Ready to scale your platform?

Contact Prixite to discuss how we can help enhance your technology capabilities and deliver the user experience your customers expect.