

## Recommender Systems for Personalized Investment Proposals

### Presenter:

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### Abstract:

Many financial institutions offer investment services to individual clients to help them reach their investment objectives. These institutions constantly seek to improve the advisory offering and to provide personalized investment strategies to clients in a timely and cost-effective manner.

Nowadays hybrid robo-advisory processes are becoming used more frequently and thus recommendation technologies become important and effective. However, traditional recommendation algorithms such as Collaborative Filtering are usually inadequate for this complex task of recommending financial products.

In this talk, we will see how Case-based recommender systems can take into account the specificities and constraints of the financial domain to appropriately recommend investment proposals.