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AI-Powered Portfolio Insights: Connecting Claude to IBKR

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AI Connectors

- Available through:
  - ChatGPT
  - Claude
  - Grok
    - Gemini (Coming Soon)
- Connects to:
  - Client Portal
  - IBKR Desktop
  - IBKR GlobalTrader
  - IBKR Mobile
  - Trader Workstation

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Core Functionality

- Analyze Portfolio
- Research Investments
- Monitor Risk
- Draft Trade Instructions
  - Remain in the driving seat!

- AI assistant works with:
  - Positions and cash balances
  - Margin availability
  - Realized and unrealized P&L
  - Historical transactions
  - Option chains
  - Risk exposures
  - Portfolio structures

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Game of Chess

- Starting an AI conversation is like playing a game of chess.
- A single natural language prompt can result in a complex conversation.
- Allows you to challenge your assumptions, run hypotheses and what-ifs.
- Responses and visual artifacts can help you run test iterations.

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Examples

- Show my portfolio risk and where the greatest exposure is.
- Show me my risk by sector.
- How sensitive is my portfolio to a change in interest rates at the Fed?
- How can I best diversify my portfolio?

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Scenario

- I want to make a trade using futures to possibly benefit from movement in the 2-10yr yield curve spread. Analyze the current value of the yield curve and suggest a futures spread trade using contracts for CME 2-year note and 10-year notes under the view that the Fed's next rate move is higher.
  - Asset
  - Analyze
  - Evaluate
  - [Place Trade]

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Scenario

- Part 1. I am concerned about a 10% market correction for the S&P 500 index. Suggest a hedging strategy for a portion of some or all my portfolio using index ETFs.
- Part 2. Ditto, but change the asset class from using ETFs to a suggested options hedge.

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IBKR Tools

- Part 1. I expect the Fed to cut rates two times by Q1, which will likely favor utility stocks. Find me the best four names to invest in.
- Part 2. Ditto, but specify Claude should use IBKR Investment Themes tool.

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Let’s Connect to Claude

- We will run several of these initial probes using Claude
- You will see first responses and how Claude interacts
- And how subsequent conversation can be developed
- Let’s first connect to Claude

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Links

- AI Integration Landing Page
  - https://www.interactivebrokers.com/en/trading/ai-integrations.php?menu=B
- And the AI Hub
  - https://www.interactivebrokers.com/en/trading/ai-hub.php
- IBKR Toolbox
  - https://www.interactivebrokers.com/campus/category/traders-insight/ibkr-toolbox/

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