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Abstract:

The author surveys key requirements and specific design techniques for artificial intelligence (AI) applications in the financial services industry. After discussing some of the fundamental challenges which the financial services industry presents for decision technology, the motivations for the use of AI are related to a number of typical applications, which are broadly categorized into suitable development and delivery environments and generic domain utilities required from shells or customized systems for that industry. Markets and trades are then shown to be well described in terms of knowledge representation and data structures, by object-oriented features embedded into logic programming environments. Conflict resolution strategies, preference aggregation and revealed beliefs are studied. A formal analysis of investment decision criteria is given. An example from currency risk management exemplifies this area. Intelligent information screens are presented to stress the need for knowledge-based techniques in financial information retrieval.< >

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