

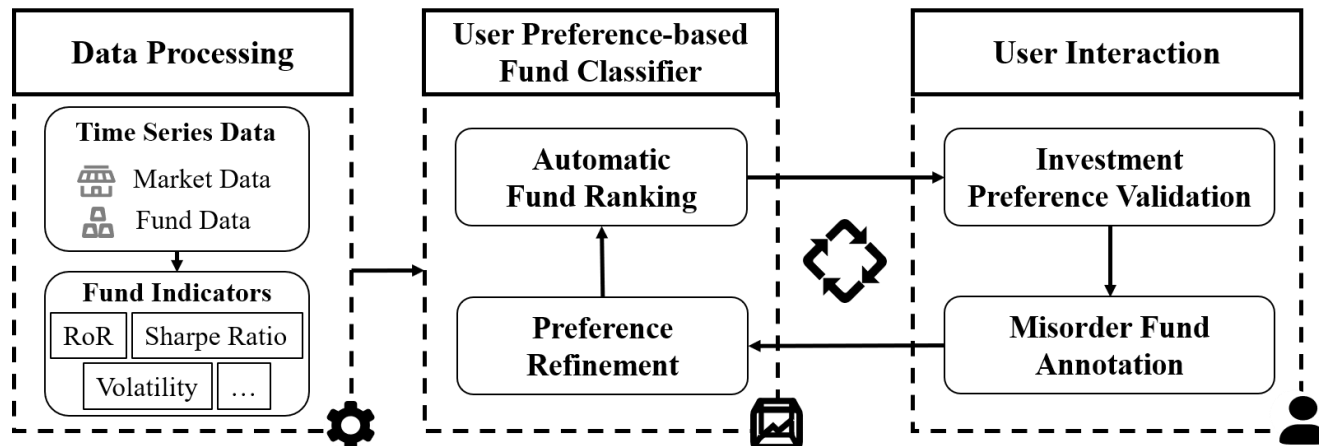
Visual Analysis Approach for Mutual Fund Selection

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Problems & Ideas

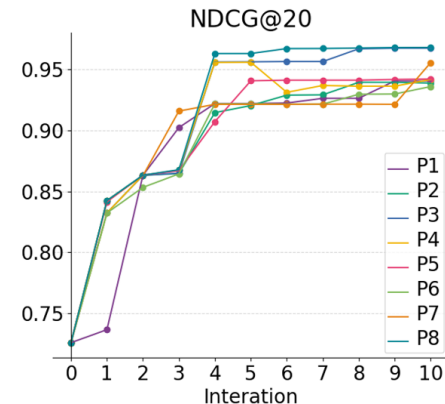
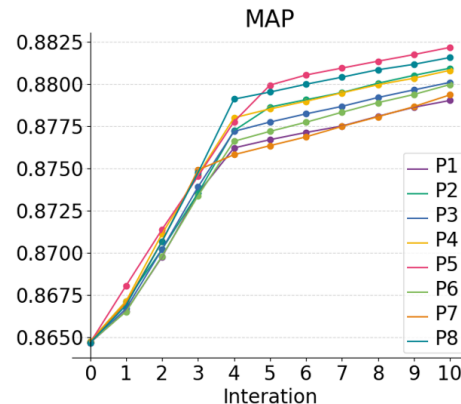
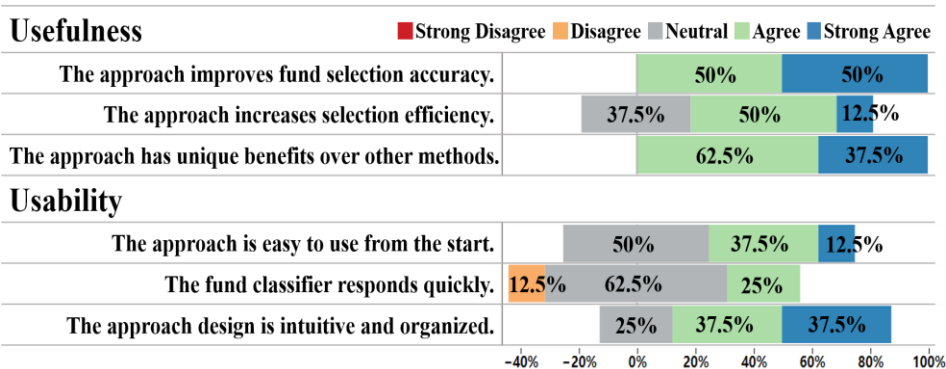
- Problems of conventional fund selection approaches:
 - Existing methods to support fund selection heavily relies on extensive user investment behavior data.
 - Online fund selection platforms primarily offer basic sorting based on *Rate of Return*, ignoring individual investor preferences.
- Ideas: A mixed-initiative approach continuously optimizes a user preference-based fund classifier through iterative investor feedback, enhancing its capability to generate fund rankings that more accurately align with investor preferences.



The approach for mutual fund selection.

Main Contributions

- Contributions:
 - We propose a mixed-initiative approach, informed by domain experts and publicly generated investor content, to achieve efficient mutual fund selection.
 - We conduct a user study and quantitative experiments with eight ordinary investors to demonstrate the usefulness and effectiveness of our approach.



User study and quantitative experiments collectively validate the efficacy and precision of our approach. Left: Results from a five-point Likert scale questionnaire assessing our approach. Right: Performance metrics (MAP and NDCG@20) for our fund classifier across iterations.