



Claude for Quant Investing: AI-Powered Research and Automation for Systematic Investors

What you get: Go from writing your first structured prompt to running your own semi-autonomous research agent, with every project tailored to a real systematic investing workflow.

Course Objectives: This interactive coaching series introduces you to Claude, Anthropic's flagship AI assistant, applied specifically to quantitative and factor-based investing. You will learn how to design high-quality prompts, automate the most time-consuming parts of your research, integrate Claude directly with Portfolio123, and build custom AI workflows that fit your day-to-day process. Each session combines a short theory block with a hands-on project, and every project after Day 1 comes with an assignment you complete before the next session. The pace is deliberately patient and practical, so the course is equally suitable for users transitioning from traditional platforms who have never written a line of code before.

Coaching Content:

- **Day 1: Theoretical Foundations and the RCTCOV Framework:**
 - The RCTCOV prompt structure
 - Skills, MCP servers, and connectors
 - Comparing Claude's three working modes
- **Day 2: Applied Prompt Engineering for Fundamental and Factor Research:**
 - Summarizing 10-K filings, earnings transcripts, and analyst reports
 - Comparing competitors and extracting investment theses from long documents
 - Writing prompts that deliver consistent, reproducible results
- **Day 3: Working with Financial Data Inside Claude:**
 - Uploading CSVs and letting Claude perform descriptive analysis
 - Generating charts, drawdown views, and performance summaries
 - Turning raw strategy data into polished, client-facing narratives
- **Day 4: First Steps with Claude Code:**
 - Running Python scripts with market data from yfinance and similar free sources
 - Iterating with Claude Code to debug, refine, and extend your scripts
- **Day 5: Connecting Claude to Portfolio123 via API:**
 - Retrieving ranks, screens, and backtest results from Python
 - Using Claude Code to write and refine your P123 API calls
 - Automating data pulls that would otherwise take hours of manual work
- **Day 6: Building Custom Skills and Connectors for Recurring Workflows:**
 - What a Skill is and how to design one around your own process
 - Using connectors to bring in data from email, Drive, and other everyday tools
 - Automating recurring reporting tasks for clients or for internal use
- **Day 7: Introduction to MCP and Integration with External Systems:**
 - What MCP is and how it extends what Claude can do for you
 - Connecting Claude to brokers such as Interactive Brokers and to your own data sources
 - Building a simple MCP server from scratch, step by step
- **Day 8: Capstone Project: Your Own Semi-Autonomous Research Agent:**
 - Combining Claude Code, a custom Skill, and at least one MCP connection
 - Generating a professional research report automatically
 - Reviewing the full workflow together and planning next steps

Target audience: Quant practitioners, portfolio managers, financial advisors, and systematic investors, including current Portfolio123 users, who want to integrate Claude into their daily research and portfolio management workflow.

Prerequisites: Basic familiarity with systematic investing concepts and comfort using at least one professional investment platform. No prior experience with AI tools or Python coding is required. Access to a Portfolio123 account is recommended. If you do not yet have one, you can have an extended trial using this link: <https://www.portfolio123.com/index.jsp?apc=morales>

Session Duration: 1-hour sessions.



Pricing:

Level	Hours	Rate	Full-Course Fee
Claude Course	8 hrs	€185 /hr	€1,480 (<u>€1,184 if paid up front!</u>)
P123 + Claude Full Course	32 hrs	€137.78 /hr	€4,409 (€3,968 if paid up front!)

Conditions:

- Total Hours: 8
- Delivery: All sessions via Google Meet (recording only with prior approval)
- Scheduling: 100% flexible, tailored to your calendar and learning pace
- Who It's For: Anyone committed to mastering systematic, factor-based investing: from novices to pro quants
- Price per person, possible discount for large groups
- Payment in EUR (€) or equivalent amount depending on the market rate.
- Payment in advance.

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