

OPCUG/PATACS Saturday Meeting

Getting AI to Dig Through Emails

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Creative Laziness

- ❖ The Problem:
 - ❖ Every week I have to dig through long email chains and format the results for an Investment Forum presentation
 - ❖ Its a lot of error-prone grunt work
 - ❖ It's also boring
- ❖ The solution
 - ❖ Perhaps an AI can do that grunt work for me

Why did I think of this?

- ❖ Every App has an AI assistant, including email apps
- ❖ I've read about vibe coding success stories including:
 - ❖ A plumber with no coding experience is running his business using Gemini to integrate Gmail, Google Docs and Google sheets to mail out job proposals, create estimates, collect approvals and send out bills.
- ❖ I figured if he could do it, so could I
 - ❖ (that is, integrate emails and sheets, not run a plumbing business)

The manual process

1. Every Friday send out an email request to OLLI's Investment Forum members to respond with their trades from that week
 2. I also ask for some rationale for the trades to help me organize the discussion
 3. Collect the emails in my Gmail account
 4. Read through the emails and for each respondent, extract the items that were bought or sold
 5. Also extract responses about activities they were considering but have not yet acted upon
 6. Get clarifications when the email is unclear
1. By the end of the weekend, there may be 10-35 emails in the chain.
 2. Monday morning, pull out the relevant information from the chain into a spreadsheet.
 3. Format the spreadsheet in a way that facilitates discussion
 4. Generate presentation PDFs for discussion at the forum on Wednesday morning
 5. Mail the PDFs to the class so they can read the list before the class
 6. Put the PDFs on a memory stick to take to the class for the to load on the presentation computer

This process has the usual manual process difficulties

- ❖ The responses are *free format*, but I need to produce slides in a *specific format*
- ❖ I'm a terrible typist so my transcriptions are of variable quality at best (even with cut and paste)
- ❖ There are usually 20-50 individual trades reported - so, I have lots of opportunity for errors
- ❖ I sometimes miss someone's trades as I read through the emails
- ❖ Below is an example of the output from the 3/4/26 forum
 - ❖ Showing the expected format
 - ❖ And my inability to type "Financial"

	B	C	E
1	Buy, Sell, & Thinking About for WE 02/27/2026		OLLI-GMU Investment Forum, 03/04/2026/
3	Buy		Sell
4	Amazon (AMZN) [+] [FA]		Alphabet (GOOGL) [-]
5	Broadbridge Financial Solutions (BR) [N] [FA]		Roche Holding AG (RHHBY) [FA] [C]
6	Vanguard Total Intl Stock fund (VXUS) [+]		Vanguard S&P 500 (VOO) [C]
7	Vanguard Europe fund (VGX) [+]		IShares S&P Momentum fund (SPMO) [-]
8	Corning (GLW) [N]		
9	Gilead (GILD) [+]		
10	IShares MSCE Chile ETF (ECH) [+]		
11	Invesco Aerospace and Defense ETF (PPA) [N]		Akre Focus ETF (AKRE) [-]
12	Lord Abbott Short Duration Hi-Yield bond (LSYAX) [N]		FAM Dividend Focus (FAMEX) [C]
13	PIMCO Income Fund (PONAX) [+]		
14	Vanguard Int'l Equity Developed Markets ETF (VEA) [+]		Vanguard S&P 500 (VOO) [-]
15	Vanguard Int'l Equity Emerging Markets ETF (VWO) [+]		
16	ONEOK Inc (OKE) [+]		Williams Companies Inc (WMB) [C]

The inputs are free form and varied (examples are from the 3/11/26 meeting)

❖ In a thread of 28 emails, including some that were not on topic, we had:

Terse

BUYS:

OKE [+]
HTGC [+]

SELLS:

WMB [C]
ARE [C]

Verbose

Sells: 1) A trim of **AKRE**. This had been a star for several years for our account but it has giving it only 2 stars and a Neutral outlook. (AKRE recently transmogrified from a mutual t downturn.) 2) A sale of **FAMEX**, FAM Dividend Focus. Had a small profit on this but I had investments were doing better.

Buys: 1) **PPA**, an Invesco Aerospace and Defense ETF. Bought prior to the Iranian attack story last week that DOD still had \$500 billion to spend on defense. And as additional the on short supply prior to any Iran action. New purchase. 2) **LSYAX**, a Lord Abbott Short D yield of 6.48%. Morningstar says risk is below average, while return is above. Returns ha is 0.66%. New purchase. in a tax-deferred account. 3) **PONAX**. the PIMCO Income Fund

Somewhere in between

Lou - I sold off a large portion of SPY; reinvested it in VEA and VWO.

The inputs ... cont.

❖ Also, we had

Nicely formatted

Buy: Amazon.com, Inc (AMZN) FA [+]

Buy: Broadbridge Financial Solutions, Inc. (BR) FA [new]

Nicely organized

Buys:

Gilead (GLD) - add

IShares MSCE Chile ETF ((ECH) - add

A little more free form

I bought a 3.701% 6 week T Bill through Treasury Direct

On my own I continued my attempt to rebalance my portfolio by buying BND, BNDX and FBND ETFs.

I also added to my NVDA as I think the drop is temporary.

I am investigating FIDI and FDEV for diversification away from stocks.

More prose than a list

Bought a (new) stock, Corning. GLW. Purchased based on statement that cables made of fiber optics (which Corning makes) will replace copper in semi-conductors as fiber cables transmit data using light, which generates minimal heat, especially compared to using copper wiring which transmit data using electricity. The heat produced in high density

The output format I need

- ❖ Two columns
 - ❖ Buys on one side
 - ❖ Sells on the other side
- ❖ For each stock or fund
 - ❖ The full or commonly know name
 - ❖ The ticker symbol in parens
 - ❖ Then some symbols after
 - ❖ [N] New position
 - ❖ [+] Add to a position
 - ❖ [C] Closed Position
 - ❖ [-] Trimmed position
 - ❖ [FA] Financial Advisor made the trade
 - ❖ [#] number of members making that trade, if >1

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6	Vanguard Total Intl Stock fund (VXUS) [+]		Vanguard S&P 500 (VOO) [C]
7	Vanguard Europe fund (VGX) [+]		IShares S&P Momentum fund (SPMO) [-]
8	Corning (GLW) [N]		
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10	IShares MSCE Chile ETF (ECH) [+]		
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16	ONEOK Inc (OKE) [+]		Williams Companies Inc (WMB) [C]

example from the 3/4/26 meeting

I created the prompt iteratively

- ❖ *Gemini, please scan through the email thread in my inbox with the subject line: Trades for W/E 02/27/2026. Extract every buy or sell made and produce a list of the items in the trade along with the name of the person making the trade.*
 - ❖ First it asked if it was ok to connect to my emails
 - ❖ As it was part of my google workspace, I went through the process to do so, including logging in.
 - ❖ It produced a pretty good list, so we were off to the races
- ❖ *Now, for those items that have just ticker symbols, please expand out the full stock name. And for those with names but not symbols, add the ticker symbol*
- ❖ *Put the name in column 1 and item traded in column 2*
- ❖ *Now reformat the trade to have the format Equity Name (Ticker Symbol)*
- ❖ *Now, based on what the author of the email said add the annotations [N], [+], [C], [-] ... (as I described before) and if it is unclear just don't add an annotation*
- ❖ *Please put the buys in the left 2 columns and the sells in the right two columns*
 - ❖ Looking good, so..
- ❖ *Now do the same report for the email titled Trades for W/E 3/06/2026*
 - ❖ *And it just did it*

I had to stop when getting fancier didn't work

- ❖ I was really close.
- ❖ So I tried one more thing:
*Now read through and list all the trades the members were **thinking about***
- ❖ This was a flop.
- ❖ It reported lots of trades that no one said they thinking about.
- ❖ Either it made things up, or it read other emails, or it just hallucinated, or it read people's minds
 - ❖ Regardless, it was useless

- ❖ So, I reverted to the prior prompt
- ❖ I clicked the little spread sheet icon and it added a Google Sheet to my Google Workspace (See below. people's names were removed for this presentation):

	A	B	C	D
1	Person	Buy (Symbol)	Person	Sell (Symbol)
2		Goldman Sachs Nasdaq-100 Premium Income ETF (GPIQ) [+]		AES Corporation (AES) [C]
3		Capital Southwest Corporation (CSWC) [+]		Blackstone Private Credit Fund Bond [C]
4		Microsoft Corp. (MSFT) [+]		Goldman Sachs Nasdaq-100 Premium Income ETF (GPIQ) [C]
5		Goldman Sachs BDC Bond [N]		SPDR S&P 500 ETF Trust (SPY) [C]
6		iShares Global Infrastructure ETF (IGF) [+]		
7		Vanguard Value ETF (VTV) [+]		
8		Vanguard Total International Stock ETF (VXUS) [+]		
9		SPDR Portfolio Emerging Markets ETF (SPEM) [+]		
10		Newmont Corporation (NEM) [+]		
11		Vanguard Industrials ETF (VIS) [+]		
12		Getty Realty Corp. (GTY) [N]		
13		Vanguard S&P 500 ETF (VOO) [+]		

So I need to do some minor reformatting

It created this

	A	B	C	D
1	Person	Buy (Symbol)	Person	Sell (Symbol)
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4		Microsoft Corp. (MSFT) [+]		Goldman Sachs Nasdaq-100 Premium Income ETF (GPIQ) [C]
5		Goldman Sachs BDC Bond [N]		SPDR S&P 500 ETF Trust (SPY) [C]
6		iShares Global Infrastructure ETF (IGF) [+]		
7		Vanguard Value ETF (VTV) [+]		
8		Vanguard Total International Stock ETF (VXUS) [+]		
9		SPDR Portfolio Emerging Markets ETF (SPEM) [+]		
10		Newmont Corporation (NEM) [+]		
11		Vanguard Industrials ETF (VIS) [+]		
12		Getty Realty Corp. (GTY) [N]		
13		Vanguard S&P 500 ETF (VOO) [+]		

So I did it by hand

But, I needed this:

	Buy, Sell, & Thinking About for WE 03/06/2026	OLLI-GMU Investment Forum, 03/11/2026
1	Buy	Sell
2		
3	Microsoft Corp. (MSFT) [+] [FA]	
4	Energy Transfer LP (ET)	
5	Plains All American Pipeline LP (PAA)	
6	Stevanato Group SpA (STVN)	
7	iShares Global Infrastructure ETF (IGF) [+]	
8	Vanguard Value ETF (VTV) [+]	
9	Vanguard Total International Stock ETF (VXUS) [+]	
10	SPDR Portfolio Emerging Markets ETF (SPEM) [+]	
11	Newmont Corporation (NEM) [+]	
12	Vanguard Industrials ETF (VIS) [+]	
13	Getty Realty Corp. (GTY) [N]	Goldman Sachs Nasdaq-100 Income ETF (GPIQ) [C]
14	Goldman Sachs Nasdaq-100 Income ETF (GPIQ) [+]	
15	Capital Southwest Corporation (CSWC) [+]	AES Corporation (AES) [C]
16	Vanguard S&P 500 ETF (VOO) [+]	SPDR S&P 500 ETF Trust (SPY) [C]
17		
18		

Where Did I end up?

- ❖ Things it didn't do:
 - ❖ Table formatting
 - ❖ Special ordering
 - ❖ Putting similar orders together (vertically)
 - ❖ Aligning member's buys and sells
 - ❖ Putting buys opposite another person's sells
 - ❖ Information from other emails not in the thread
 - ❖ The thinking about list (not pictured)
 - ❖ Print out my PDFs
- ❖ I still had to scroll through the email chain to verify that the AI did things right
 - ❖ I had to do that when I did the transcriptions, too
- ❖ In the end, *it saved me about an hour of drudgery*

Other things it might have done (or I might do)

- ❖ Things it offered to do that I might consider
 - ❖ Retrieving performance info on the stocks & funds
 - ❖ Monitoring the email thread and updating the table on Sunday night
 - ❖ Summarize common narratives shared by the group
- ❖ Going forward what else could I try?
 - ❖ Include Bond buys/sells
 - ❖ Fix “thinking about” issues
 - ❖ Better ordering and formatting
 - ❖ Run automatically Sunday night on the newest email chain
 - ❖ Create other formats for other uses
 - ❖ A report of each person’s rationale (almost ready)
 - ❖ A Morningstar Watchlist