PacificCPE

COURSE

82001B

AI-Driven Strategies: The Basics ad Stock Investing

Artificial intelligence is transforming investing, and this course helps you get your bearings. Starting with AI fundamentals and a hands-on look at ChatGPT, you'll build a solid foundation before exploring the broader AI landscape and what it means for financial assets. From there, the course covers large-cap and small-cap AI stocks, IPOs, ETFs, mutual funds, and robo-advisors—with practical cautions flagged along the way. Fundamental and technical analysis wrap things up, equipping you to evaluate AI-related investment opportunities with a sharper, more informed eye.

CREDIT HOURS **2** | FIELD OF STUDY **BUSINESS** | EXAM QUESTIONS **10**

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LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Recall examples of various types of AIs.
- Recall specific benefits or services that ChatGPT can provide to investors.
- Recognize the most well-known chatbot.
- Identify the various levels of market capitalization.
- Recall the characteristics of small-cap stocks.
- Recall the primary difference between ETFs and mutual funds.
- Identify the characteristics and features of robo-advisors.
- Identify the top consideration in the world of fundamental analysis.

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Publication Date: July 2026

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Chapter 1: ARTIFICIAL INTELLIGENCE 101

Chapter Objective

After completing this chapter, you should be able to:

- Recall examples of various types of AIs.

Artificial intelligence, more commonly known as AI: It's all the rage today, and it will likely end up in every corner of modern life. It stokes both excitement and fear. It's changing the business, social, and financial landscape as I write this.

When it comes to AI, the best choice for people is to do what you're doing right now — learning what it is, what it can do, and how you can use it to your advantage in today's competitive economy. Like every major innovation in human history, it can have amazing positive power, and it can have the power to harm. Use it to make yourself stronger. This chapter gets you started on the road to investing with AI.

FIRST THINGS FIRST: WHAT IS AI?

As a business person and a financial educator, I generally avoid in the scope of this singular book the techie stuff and stick to the how-do-I-use-this-stuff approach. I pride myself on being an educator, and I look at artificial intelligence the same way I look at a laptop computer or a smartphone — like a tool. I may not be able to explain the inner workings of it with much precision, but I know how to use it to achieve my goals or to satisfy my wants and needs.

As for AI, let's do the obvious thing here and ask AI about AI. I use ChatGPT (which is covered in greater detail in Chapter 2). My question (more commonly known as a prompt):

> "Please define and explain AI in less than 150 words as if I were an eighth grader."

The response from ChatGPT is in Figure 1-1.

FIGURE 1-1: ASKING AI ABOUT AI.

ChatGPT's Response

Artificial intelligence, or AI, is like giving computers the ability to think and learn on their own. It's a smart computer system that can understand things, make decisions, and even solve problems without being explicitly programmed for each task. Imagine a really smart robot that can figure out how to play a new game or help you with your homework by learning from examples. AI uses data and patterns to make predictions and choices, making it a bit like a computer brain. From virtual assistants to video game opponents, AI is all around us, making machines smarter and more helpful.

Cool! ChatGPT says it's like a smart robot that can help you with your problems and tasks. That's my kind of answer. Throughout the book I use examples from AI tools, predominately from ChatGPT and also AI-enhanced tools such as Bing Chat (yes, the turbo-charged version of Microsoft's Bing Search engine).

Tip

I wrote this course fully mindful that AI is constantly changing and improving. Make it a point to visit any resource listed throughout this course (especially in Part 6) that is relevanttoyourc oncerns (and plentyofvaluabl eresourcesarein cluded). Ther esources are both general and specific, but timely, and they are constantly updated to help you keep up with AI's development.

DISTINGUISHING THE TWO TYPES OF AI

Although I could ask AI to provide an extensive explanation of AI and I could spew all the facets and jargon about it, I'll stick to my terminology about AI in the following sections. The two types of AI are general and specific. Horizontal and vertical would also do.

General AI

The reason I also refer to general AI as "horizontal" is that this type of AI spans the vast digital landscape to produce the response to your inquiry or request. It can be good for starters and for general knowledge.

A good example of this type of AI is the popular ChatGPT (see Chapter 2). Despite its awesome capabilities, I wouldn't use it for an intense, specific purpose. For example, I could use it to learn skills such as creating a web page, but I wouldn't rely on it to learn about brain surgery or cancer. I would go to specialized sources for that or (better) human experts.

Tip

Another general AI tool to add to your arsenal would be AI-enhanced search engines. The last time I looked, you could choose from 18 AI-enhanced search engines, but that number may have changed in the time it took for you to read this! You can find them in Appendix B.

Specific AI

Vertical or specific AI concentrates on a given topic or specialty. Good examples of this are robo-advisors (covered in Chapter 7). Keep in mind that part of the power of AI is that it uses its technological power to learn about what it's working on. Some AI tools specialize in finance, but other tools specialize in healthcare, and so on.

Tip

I think the best example of this is when you need medical treatment or the attention of a doctor. You would first go to a general practitioner (GP). But after that you may need some specialized attention. The GP may know about your heart, for example, but the GP would ultimately need to refer you to a cardiologist. Think of general and specific AI in the same way.

In Chapter 3, different categories of AI are covered; take a look there for some excellent AI directories that can help you find the right AI tool for whatever issue you want to address.

INVESTING IN STOCKS WITH AI'S HELP

The primary reason you may have gotten this course is because the title includes both "AI" and "investing," and the heart of this combo is covered in Part 2.

Remember

Keep in mind that in this course, as with most of the investing books I author, I point out the crucial distinctions between "investing" and "speculating." To put it simply, investing is putting your money into assets and/or vehicles that have value today and the possibility of much greater value over time. Meanwhile, speculating is essentially like educated gambling, hopefully to make greater gains sooner despite greater risks. Everybody wants to get that amazing stock when it's cheap and obscure and to watch it soartomind-bogglinglevels as"ka-ching"is ringinginourbro kerageaccounts. Itcould happen with your investing (such as large-cap tech stocks), and you could hit it big with your speculating (such as with small-cap stocks), but you should know the difference.