

## AI/ML Tools for U.S. Stock Investing (2024–2025)

Retail investors now have many AI-powered platforms for stock analysis, ranging from real-time trade alerts to fundamental screening and sentiment analysis. Below we survey leading tools (free and paid) and recent research. Each table lists a product's key capabilities, pricing model, intended users, and underlying technology.

### Real-Time Trading Insights & Alerts

These tools scan markets and news in real time, alerting traders to technical patterns, event-driven moves, or momentum shifts. They target active and day traders. For example, **BetterTrader** uses ML algorithms to interpret macroeconomic events as they happen, issuing predictive trade “ideas” and alerts <sup>1</sup> <sup>2</sup>. BetterTrader offers a free tier and paid plans (Starter ~\$39–\$49/mo, Smart ~\$49–\$99, Pro ~\$69–\$129, or a \$2,399 lifetime license) <sup>3</sup> <sup>4</sup>. Likewise, **Trade Ideas** provides an AI-driven stock scanner that spots “explosive moves” and generates trade signals. Its Basic plan (Birdie Bundle) starts at ~\$89/month (annual billing) and Premium at ~\$178/month <sup>5</sup> <sup>6</sup>. **BigShort AI** (TigerGPT) is another paid platform for day/swing traders, offering predictive chart indicators (e.g. a “Squeeze” indicator with a purported ~90% win rate) and real-time alerts <sup>7</sup>. Startup **Zentrix.ai** recently launched “Coach Z,” an AI assistant that analyzes real-time technical indicators and live social/news chatter to produce pre-market reports. Users can schedule Coach Z to email daily analyses (e.g. technical summaries and news sentiment) each morning <sup>8</sup> <sup>9</sup>.

Tool/Platform	Capabilities	Pricing	Target Users	Technology
<b>BetterTrader</b> <sup>1</sup> <sup>2</sup>	Real-time macroeconomic event alerts; predictive trade ideas	Free basic; paid plans (Starter ~\$39–\$49/mo; Smart ~\$49–\$99; Pro ~\$69–\$129; Lifetime \$2,399) <sup>3</sup> <sup>4</sup>	Day and swing traders	Proprietary ML algorithms analyzing historical data and news for event-driven signals <sup>1</sup>
<b>Trade Ideas</b> <sup>5</sup> <sup>6</sup>	AI-powered stock scanner with real-time signals and backtesting	Basic \$89/mo (annual \$1,068); Premium \$178/mo (annual \$2,136) <sup>5</sup> <sup>6</sup>	Active traders (day/swing)	“Second-generation” AI engine scans hundreds of criteria, spotting momentum stocks <sup>10</sup>

Tool/Platform	Capabilities	Pricing	Target Users	Technology
<b>BigShort AI (TigerGPT)</b> <sup>7</sup>	Predictive real-time charting and indicators (e.g. high-accuracy “squeeze” signals)	Paid subscription (details private)	Day/swing traders	Proprietary AI/ machine-learning algorithms analyzing orderflow and price data (real-time) <sup>7</sup>
<b>Zentrix.ai (Coach Z)</b> <sup>8</sup> <sup>9</sup>	AI assistant that analyzes intraday technical indicators, press releases, and social chatter; scheduled reports (e.g. pre-market email briefs)	Beta (coming 2025)	Active traders	Deep-learning and NLP models processing live charts and news; email delivery of AI reports <sup>8</sup> <sup>9</sup>
<b>Tickeron</b> <sup>11</sup> <sup>12</sup>	AI-driven pattern recognition scanner (realtime chart analysis); buy/sell/ forecast signals for stocks, ETFs, forex, crypto	Plans ~\$60–\$250+/mo (Basic ~\$50–100; Pro ~\$120–210; Premium \$250) <sup>12</sup> <sup>13</sup>	Traders seeking quantitative tools	Machine-learning pattern detectors trained on historical price data; provides probability/ confidence for each detected pattern <sup>11</sup>

Table: Real-time trading alert tools (free & paid tiers, tech).

## Fundamental & Quantitative Analysis

These platforms use ML models and big data to assess company fundamentals, valuations, and quantitative signals. **Kavout** offers an “AI Stock Picker” with its proprietary *Kai Score*, ranking ~9,000 US stocks daily by expected return. Kavout’s InvestGPT feature lets users chat with an AI about stocks (“What should I buy?”) <sup>14</sup>. The free tier provides basic data on ~9,000 US stocks and 20+ years of financials <sup>15</sup>. A paid Pro plan (\$20/mo) unlocks unlimited AI queries, the full *Kai Score* screener, consensus leaderboards, social/insider sentiment, intraday movers, and crypto data <sup>16</sup> <sup>14</sup>.

**Danelfin** is an AI stock analytics service with “Explainable AI” scoring. It ingests hundreds of signals (technical, fundamental, sentiment) to give each stock an “AI Score.” Danelfin’s Pro plan (\$52/mo or \$624/yr) provides unlimited stock reports, rankings, technical/fundamental/sentiment signals, portfolio analysis and historical AI-Scores <sup>17</sup>. A lighter Plus tier (\$19/mo or \$228/yr) offers many features in limited quantity <sup>18</sup>; a free tier gives daily “Top 10” newsletters and a few reports per month. For example, Danelfin shows how its top-ranked stocks (by AI Score) have significantly outperformed the S&P 500 historically <sup>19</sup>.

Tickeron's **"Screener"** (now built into tickeron.com) automates stock selection via AI. It combines fundamental filters with technical trend analysis and "Smart Filters" for valuation ratios, sector trends, and growth metrics <sup>20</sup> <sup>21</sup> . This tool is aimed at self-directed investors who want to run quantitative screens quickly. (Tickeron's Screener is part of its paid suite.)

Other tools include **PortfolioPilot (Global Predictions)**, which advises users on portfolio fit to goals, and even a ChatGPT plug-in (Global Predictions) where users paste their holdings and get AI suggestions <sup>22</sup> . Interactive Brokers also offers an "AI Analyst" via **Toggle AI**, a fintech platform that analyzes ~36,000 global assets with machine learning <sup>23</sup> .

Tool/Platform	Capabilities	Pricing	Target Users	Technology
<b>Kavout (InvestGPT)</b> <sup>16</sup> <sup>14</sup>	AI stock screener (Kai Score), realtime movers, insider/ social sentiment, plus a ChatGPT-like stock assistant	Free tier; Pro \$20/mo (annual \$228) <sup>16</sup>	Fundamental traders; quants	Machine learning ranking models and GPT-4 for conversational analysis; big data on fundamentals, news, insider trading <sup>16</sup> <sup>14</sup>
<b>Danelfin AI</b> <sup>18</sup> <sup>24</sup>	AI-driven stock ratings, portfolio scorecards, daily trade ideas; explainable alpha signals (technical, fundamental, sentiment)	Free tier; Plus \$19/mo (annual \$228); Pro \$52/mo (annual \$624) <sup>18</sup>	Individual investors, portfolio managers	Explainable ML models combining hundreds of stock "alpha signals" to compute an overall score <sup>24</sup>
<b>Tickeron Screener</b> <sup>25</sup> <sup>20</sup>	Automated technical/ fundamental stock analysis; sector and theme analytics; "Smart Filter" for valuation, trend and growth criteria	Included with Tickeron subscription (plans \$60–250+/mo)	DIY investors and swing traders	AI-enhanced filters over fundamental metrics and chart patterns for stock ranking <sup>25</sup>
<b>Toggle AI (via IB)</b> <sup>23</sup>	AI-driven analysis of 36,000+ stocks/ETFs (metrics, trend forecasts)	AI Analyst feature via Interactive Brokers (IBKR add-on)	Interactive Brokers clients	Big-data machine learning models on market/financial data; cloud analytics

Tool/Platform	Capabilities	Pricing	Target Users	Technology
<b>PortfolioPilot (Global Predictions)</b> <sup>22</sup>	Personal finance & portfolio advice; matches investments to goals and risk tolerance (and ChatGPT plugin for portfolio queries)	Freemium (basic web tool free, premium features available)	DIY investors planning portfolios	AI advisory models; uses NLP/LLM for chat-based suggestions (GPT-based chat plugin)

Table: AI-powered fundamental/quant analysis tools (free and paid).

## Sentiment & News-Based Analysis

These platforms parse news and social media with NLP models to gauge market sentiment or highlight key events. **StockGeist.ai** is a market-sentiment dashboard that tracks social media (Stocktwits, Reddit, Twitter, etc.) sentiment for 2,200+ US stocks <sup>26</sup>. Its free plan provides the past 24h of sentiment data (5-min resolution), the top-5 ranked companies, and up to 3 watchlist symbols with latest articles (including sentiment highlights) <sup>27</sup>. Paid tiers (\$50/mo Starter, \$100/mo Pro) extend history to 7–30 days, allow 10–20 stocks in watchlists, unlimited recent news items (with sentiment tags), and full fundamental metrics <sup>27</sup> <sup>28</sup>. Notably, StockGeist uses AI to *summarize* each news item: it highlights the most relevant parts of articles via a natural-language (LLM) summary <sup>29</sup>.

**Stock Titan** offers an AI-curated real-time stock news feed. Free users see breaking news on followed stocks (delayed ~30 sec), while “Gold” subscribers get instant alerts <sup>30</sup>. Its RHEA-AI engine provides instant news analysis and summarization with a sentiment score for each item <sup>31</sup>. Users can filter alerts by keywords or sectors. Stock Titan also includes tools like a momentum scanner and keyword alerts, making it useful for traders relying on news flow.

Other sentiment tools include Swissquote’s AI platform (for European investors) which delivers AI-curated stock lists and media sentiment scores. In a different vein, retail investors increasingly use general LLMs: for example, many investors consult ChatGPT or Google Bard on stock news and financial data. A recent survey found nearly half of U.S. investors use generative AI to “gather and interpret financial data,” often to process complex news quickly <sup>32</sup>. Advanced users employ ChatGPT plugins (e.g. Stock Analysis GPT) to fetch real-time quotes and news for LLM analysis.

Tool/Platform	Capabilities	Pricing	Target Users	Technology
<b>StockGeist.ai</b> <sup>29</sup> <sup>27</sup>	AI-processed social media sentiment (dynamic rankings, word clouds); AI-summarized news highlights; fundamentals dashboard	Free (24h data, 3 stock watchlist); Starter \$50/mo; Pro \$100/mo <sup>27</sup>	Retail traders monitoring sentiment and news	Deep-learning sentiment analysis on social/text data; LLM-based text summarization of news <sup>29</sup>

Tool/Platform	Capabilities	Pricing	Target Users	Technology
<b>Stock Titan</b> <small>30 31</small>	AI-powered news feed for individual stocks; real-time sentiment scoring and summarization (RHEA-AI); momentum/keyword scanners	Free basic news feed (30s delay); “Gold” sub for instant alerts	Traders who follow breaking news	NLP and ML to analyze and score news items; proprietary summarization engine <small>31</small>
<b>Social Media/ LLM Tools</b>	(Not a single product) – e.g. ChatGPT/Bard for stock Q&A; Stocktwits/Reddit sentiment scraping tools	ChatGPT/Bard: free/paid tiers; plugins may require subscriptions	Informed retail investors using AI for ad hoc queries	Large language models (GPT-4, Claude, Bard, etc.) parsing news/data; custom sentiment APIs (RavenPack, etc.)
<b>Swissquote AI Platform</b>	AI-curated stock lists and media sentiment scores (for Swiss exchange and global stocks)	Account-based (brokerage account needed)	Swiss/euro investors with Swissquote accounts	AI curation and NLP on news media and social data

Table: Sentiment and news analysis tools.

## Research on AI for Retail Investing

Recent studies examine how AI/LLMs impact retail investment decisions. Papasotiriou et al. (JPMorgan AI Research, 2024) show that GPT-4 (32k model) can ingest fundamentals, market and news data to generate stock ratings; their LLM-based ratings outperformed traditional analyst ratings on forward returns when fundamentals were included 33. In contrast, Li et al. (2025, Edinburgh) find that naïve LLM trading strategies often *underperform* broad market benchmarks over long periods. In extensive backtests across 20+ years and hundreds of stocks, they report LLM-based timing signals were “overly conservative in bull markets (underperforming passive indices) and overly aggressive in bear markets” 34. This suggests LLMs need better trend detection and risk controls.

Blankespoor et al. (Univ. Washington, Dec 2024) surveyed 2,175 US retail investors on generative AI use. They found **≈50% of investors already use AI** (primarily ChatGPT) for gathering and interpreting financial/news data. More sophisticated investors adopt AI for complex tasks, while novices remain skeptical (due to privacy and accuracy concerns) 32 35. Nearly two-thirds expect to continue using AI, but the authors warn this may widen the gap between informed and uninformed investors 32 35. Gimmelberg et al. (2023) conducted interviews showing retail investors prefer **combining LLM insights with human expertise**, acknowledging AI’s help but not full trust—LLMs are seen as aiding “access to expert opinions” rather than replacing financial advice 36.

Industry reports echo these findings. The Ontario Securities Commission’s 2024 AI review notes that “AI analyst” features (e.g. IBKR’s Toggle AI) and standalone chatbots are emerging. It highlights tools like

Tickeron (pattern recognition AI), PortfolioPilot, and even a new ChatGPT plugin for portfolio analysis <sup>22</sup> <sup>37</sup> . The report also lists AI-driven ETFs (e.g. AIEQ, BUZZ) and robo-advisors as automation examples. Overall, academic and regulatory research agree that while AI/ML can greatly expand retail investors' toolkit, users must be aware of model limitations and biases <sup>33</sup> <sup>32</sup> .

**Key References:** Recent papers include *"AI in Investment Analysis: LLMs for Equity Stock Ratings"* (Papasotiriou et al. 2024) <sup>33</sup> , *"Can LLM-based Strategies Outperform?"* (Li et al. 2025) <sup>34</sup> , and *"Generative AI and Investor Processing of Financial Information"* (Blankespoor et al. 2024) <sup>32</sup> <sup>35</sup> . These, along with industry reports <sup>22</sup> <sup>36</sup> , provide evidence on both the promise and caveats of AI in retail stock investing.

---

1 2 Actionable, Real-Time Trading Insights - BetterTrader.co

<https://bettertrader.co/>

3 4 BetterTrader - Pricing & Features

<https://bettertrader.co/pricing.html>

5 6 Trade Ideas Subscription Plans - Standard to Premium Trading Tools

<https://www.trade-ideas.com/pricing/>

7 BigShort AI Reviews: Use Cases, Pricing & Alternatives

<https://www.futurepedia.io/tool/bigshort>

8 9 Zentrix.ai – The Founders of Zentrix.ai Turn Their Passion for Stock Trading and Innovation Into an AI-Powered Stock Insights Platform – Innovations of the World

<https://innovationsoftheworld.com/zentrix-ai-the-founders-of-zentrix-ai-turn-their-passion-for-stock-trading-and-innovation-into-an-ai-powered-stock-insights-platform/>

10 Best Stock Screeners for June 2025

<https://www.investopedia.com/best-stock-screeners-5120586>

11 12 13 Tickeron AI Review: Is It Worth It in 2025?

<https://www.wallstreetzen.com/blog/tickeron-review/>

14 15 16 Unlock AI-Driven Market Insights in Seconds! With Kavout InvestGPT Pro, your next investment move is just a question away.

<https://www.kavout.com/pricing-plans>

17 18 Plans & Pricing | Annual Premium Plans to Pick Best Stocks

<https://danelfin.com/pricing/annual>

19 24 Danelfin | AI Stock Picker to Find the Best Stocks

<https://danelfin.com/>

20 21 25 AI Stock Screener: Empowering Retail Investors with Pro Tools

<https://tickeron.com/trading-investing-101/ai-stock-screener/>

22 23 37 Microsoft Word - Artificial Intelligence and Retail Investing Use Cases and Experimental Research - Final Report.docx

<https://www.bi.team/wp-content/uploads/2024/09/Artificial-Intelligence-and-Retail-Investing-Use-Cases-and-Experimental-Research-Final-Report.pdf>

26 29 Market Sentiment Tracking Platform

<https://www.stockgeist.ai/>

27 28 Dashboard Pricing | Subscription Plans

<https://www.stockgeist.ai/dashboard-pricing/>

30 31 Stock Titan: AI-Powered Tools for Smarter Trading & Investing

<https://www.stocktitan.net/>

32 35 Generative AI and Investor Processing of Financial Information by Elizabeth Blankespoor, Joe Croom, Stephanie M. Grant :: SSRN

[https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=5053905](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=5053905)

33 AI in Investment Analysis: LLMs for Equity Stock Ratings

<https://arxiv.org/html/2411.00856v1>

34 Can LLM-based Financial Investing Strategies Outperform the Market in Long Run?

<https://arxiv.org/html/2505.07078v1>

36 Bridging Human Expertise and AI: Evaluating the Role of Large Language Models in Retail Investors' Decision-Making | International Journal of Finance & Banking Studies (2147-4486)

<https://www.ssbfnnet.com/ojs/index.php/ijfbs/article/view/3910>