

Exercise 3A: Financial Data with MCP

MGMT 675: Generative AI for Finance

Install the Alpha Vantage or Financial Modeling Prep MCP server in Claude Desktop. Use it to retrieve financial data for a company of your choice (e.g., income statement, balance sheet, or stock prices for the last 5 years).

Ask Claude to:

- (a) Retrieve the data using the MCP server tools
- (b) Analyze trends (e.g., revenue growth, margin changes, debt levels)
- (c) Produce a formatted summary table in Excel

Deliverables.

- Excel summary (`3A-Summary.xlsx`)
- Screenshot showing the MCP server in your config (`3A-Config.png`)
- Screenshot showing Claude using the MCP tools (`3A-Tools.png`)
- Screenshot of the final output (`3A-Output.png`)