Investment Report

Business Science

```
library(gt)
library(tidyquant)
library(timetk)
library(tidyverse)
```

This report contains information on a **Technology Portfolio** that consists of **AAPL** over the time period from **2010-01-01** to **2019-12-31**.

```
# Get stock data ----
stock_data_tbl <- tq_get(
        x    = params$symbols,
        from = params$start,
        to   = params$end
    ) %>%
    select(symbol, date, adjusted)

# * Percent Change by Year ----
stock_performance_tbl <- stock_data_tbl %>%
    pivot_table(
        .rows    = ~ YEAR(date),
        .columns = ~ symbol,
        .values  = ~ PCT_CHANGE_FIRSTLAST(adjusted)
    ) %>%
    rename(YEAR = 1)

# PIVOT CHARTS ----

color_fill <- "#1ecbe1"

column_names <- setdiff(names(stock_performance_tbl), "YEAR")

pivot_table_gt <- stock_performance_tbl %>%
    gt() %>%
    tab_header("Stock Returns", subtitle = md(str_glue("_{params$portfolio_name}_"))) %>%
    fmt_percent(columns = vars(column_names)) %>%
    tab_source_note(
        source_note = md("_Data Source:_ Stock data retreived from Yahoo! Finance via tidyquant.")
    )

pivot_table_gt
```

Stock Returns

Technology Portfolio

YEAR	AAPL
2010	50.72%
2011	22.89%
2012	30.56%
2013	4.75%
2014	42.63%
2015	−2.08%
2016	12.38%
2017	48.04%
2018	−7.05%
2019	87.37%

Data Source: Stock data retreived from Yahoo! Finance via tidyquant.