

Citations

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Part E Transcription of Verbal Exchange

Note: some text has been edited for clarity and grammar. No part was manipulated or misconstrued.

At this point the client has used the final application on their own for 3 days.

Client: Ok so I have used this web application for the last 3 days, and I am very impressed with what it does.

Me: Thank you, I just have a few things I want to talk about today for this final meeting. I promise I will try to make it quick.

Client: Sure

Me: So what were your thoughts overall about the project as a whole when you tested it?

Client: Well, I think the program works wonderfully. I have to say the simplicity of the display yet complexity of the program is something I really appreciate. Other technical software literally has hundreds of things which I have no clue about.

Me: That was one of the things we had discussed at the beginning of this program. One of the assessment criterias was ensuring that the project is aesthetically intuitive and simple.

Client: It definitely was, the dropdown menus or I think they're called expanders, either way, were really good and helped hide information I didn't leave. Also I appreciate that you stayed consistent with the 3 click rule. Even if you hadn't it would have been ok. But it helped make it simpler for me.

Me: Thank you, I'm glad you liked that. Another criteria we discussed was being able to apply all the learning models and properly make predictions. How was that for you?

Client: I have to say the models were pretty cool. They obviously took time to load, but I believe a faster computer or caching the results would eliminate that issue. All the models work as they do, I'm glad you implemented the Monte Carlo simulation, it helped condense the information but also seems very accurate. I also noticed you had included the is flip condition for the confidence intervals, I am glad that was added.

Me: I have tried my best to take your input and make sure it was implemented. But let's move on, I know when we first discussed this project you had wanted access to financial news as well as perhaps some sentiment. Was the layout clear or any thoughts you might have?

Client: It was a good idea to separate the market news from the specific stock news. I personally initially read the market news, after which once I felt I was caught up I put the ticker in and looked at the other day. The recommendation tab was very informative, generally if big funds are putting their money into a stock it's because they have optimistic views. I also liked the statistics session. I know the models take

time to load so I could take a look at the news, recommendation trend, as well as the statistics while the models train and load up.

Me: Ya the point was that by keeping the classification tabs in the bottom you would be able to look at other factors before you get to the models. You wouldn't have to wait much after.

Client: Good idea

Me: So how were the visualizations under the statistics section clear and helpful? I know we had discussed using statistics for more holistic trends. Did they help?

Client: The visualizations show the longer trends of the stock. I also noticed that because they all are bounded to zero, they can act as oscillators and can give a good indication of when to buy or sell.

Me: Ya so the moving figures are bounded to zero so if say for instance the rolling sharpe ratio is below 0 it might be a good time to buy, but if the rolling sharpe ratio is reaching an all time high it could be an indication of selling.

Client: That makes sense, if multiple graphs are way above zero it could be a sign to sell and vice versa.

Me: Yup, thats how they work. The more in agreement the better. I had another question about the working - were there any problems or issues you encountered that should have been caught?

Client: The only place where I thought there could be a potential problem would be for verifying if a ticker was accurate. There were some times when I typed an invalid ticker and it caught the mistake. The searching algorithm was fast.

Me: Ya the binary search algo runs just as expected. Were there any issues with the data or the api?

Client: No there were not any issues, but how does the providers work again? I am still unsure as to what I would need to do in terms of Api.

Me: Sure, so on the apiKeys file there are three values. The alpha-vantage api and the finnhub-api were created by simply giving your email address and they give an api key. Both of these are completely free for this project as you generally will not make more than 500 requests a day or 12 a second.

Client: I see. So what's the uptime for both data providers?

Me: I do not know the exact uptime in a form of percentage. However, both of these providers provide data for some of the biggest hedge funds and equities providers. I do not think they will ever afford to make a mistake that lasts long. Those algorithms some funds use need up to the second data.

Client: That makes sense. Anything else {my name}?

Me: Actually one last thing. So this project obviously has potential for more work and extensions. Are there any ideas particularly in mind that you have?

Client: So if you say had more time and wanted to work more on this, I think there are a few things you could do. While the machine learning models are good, they are at the end a series of text blocks. Since this project could incorporate or become a sort of virtual assistant, perhaps a future idea could be turning the models into actual assistants.

Me: I'm sorry I'm not sure I understand

Client: Like what I mean is that so basically, each model when clicked or hovered on can be an actual person saying hi im blah blah model bot. This model has been trained and the accuracy is X percent. If you want to know how the model works say you know something.

Me: Ok so basically a voice assistant which can help you understand the models better.

Client: Yes basically. You could eventually expand this to telling an assistant to open a pop up window or find the news for a stock you tell and it automatically calculates. That would require a lot more work but I think that would help increase interactivity and engagement with the project. I also think that if you want this platform to reach a broader audience or just make this an all in one project, you should consider adding an api to a brokerage. I know that recently a lot of brokerages give apis which you can then use for making trades on this platform.

Me: I understand. The platform could also run all the models. Of course using an api for brokerages would involve security issues and concerns that would need to be handled. But that is actually quite feasible. I believe there are brokerages such as Alpaca that already have that idea.

Client: I don't know enough about that, but I think those are two directions you can look for. Was there anything you'd like to talk about?

Me: I don't have anything else, thank you for your time and I hope you liked the project.

Client: Great work on it. I definitely plan on using it whenever I do any more research on stocks.