



Instructor:
Professor Henry Wong

DOSRI: AMPLIFYING SOCIALLY RESPONSIBLE INVESTING (SRI)

PRESENTATION 5

Team 1: Six Underground

Presented by:

Jephthe Louis-Jacques

Harshal Patil

Samarth Yadav

Kush Shah

Farhan Pasha Mohammed

Naga Sai Kiran Nimmakayala

Team Members



**Jephthe Louis-
Jacques**

Project Manager



Harshal Patil

Developer



Samarth Yadav

QA Analyst



Kush Shah

Developer



**Farhan Pasha
Mohammed**

Cloud Engineer



**Naga Sai Kiran
Nimmakayala**

Tester

AGENDA



1. Project Overview



2. Personas



3. Looking forward this semester



4. Sprint 4 vs Sprint 5



5. Sprint 5



6. Demo



7. Product Backlog



8. Retrospective

PROJECT OVERVIEW

- “Dosri” is a free website that provides investors insight about publicly traded companies social rating base on the ‘Environmental, Social, & Governance’ (ESG) standard rating.
- Provides investors with latest stock price, stock price and third-party brokerages accounts for creating investment accounts if interested in buying the stock
- The differentiator with the site is to amplify Socially responsible investing amongst investors by quickly helping them identify companies that are sustainable, particularly in the three categories below:
 - **Environmental** - Issues such as climate change and pollution
 - **Social** - Issues around workplace practices and human capital
 - **Governance** - Issues such as executive pay, accounting, and ethics

WHAT IS DOSRI?

*DO Socially Responsible
Investing (DOSRI)*

PERSONA 1:

CARLOS, PUBLIC SPEAKER

Background Profile:

- Carlos, a 60 years old, wealthy long-term investors that does financial public speaking, runs his own family office, always looking for new tools to make better investment decisions
- Carlos likes to research companies and read the latest stories about them to quickly identify their long-term financial positions

How Dosri can help?

- Carlos can search various publicly traded companies on Dosri and review their financials.
- Dosri simultaneously provides google articles related to the searched company for additional insight on performance.
- Carlos can search companies on Dosri to gather metrics to better inform his audience of the top performing ESG companies.



PERSONA 2: DONNA, RECENT GRADUATE



Background Profile:

- Donna, a 24 years old, recent college graduate that major in product design, currently making 120K USD, identifies as a vegan and cares about the environment.
- She sees the value of investing her dispensable money, but she is new to the finance and conscious of companies that are known for conducting unethical practices.

How Dosri can help?

- Donna can search various publicly traded companies on Dosri and review their financials.
- Dosri simultaneously provides google articles related to the searched company for additional insight on performance.
- If Donna is ready to make an investment, Dosri provides quick access links to investment brokerages at real time.

PERSONA 3:

PAUL, INVESTOR

Background Profile:

- Paul, 26 years old, a recent college graduate working as an investment advisor at a Bank, is aiming to bring more value himself to the Bank and all the customers.
- His thinking is not only are investments in socially responsible assets vastly growing. The market shows that this interest stems to a significant extent from investors trying to align their investments with their social preferences.

How Dosri can help?

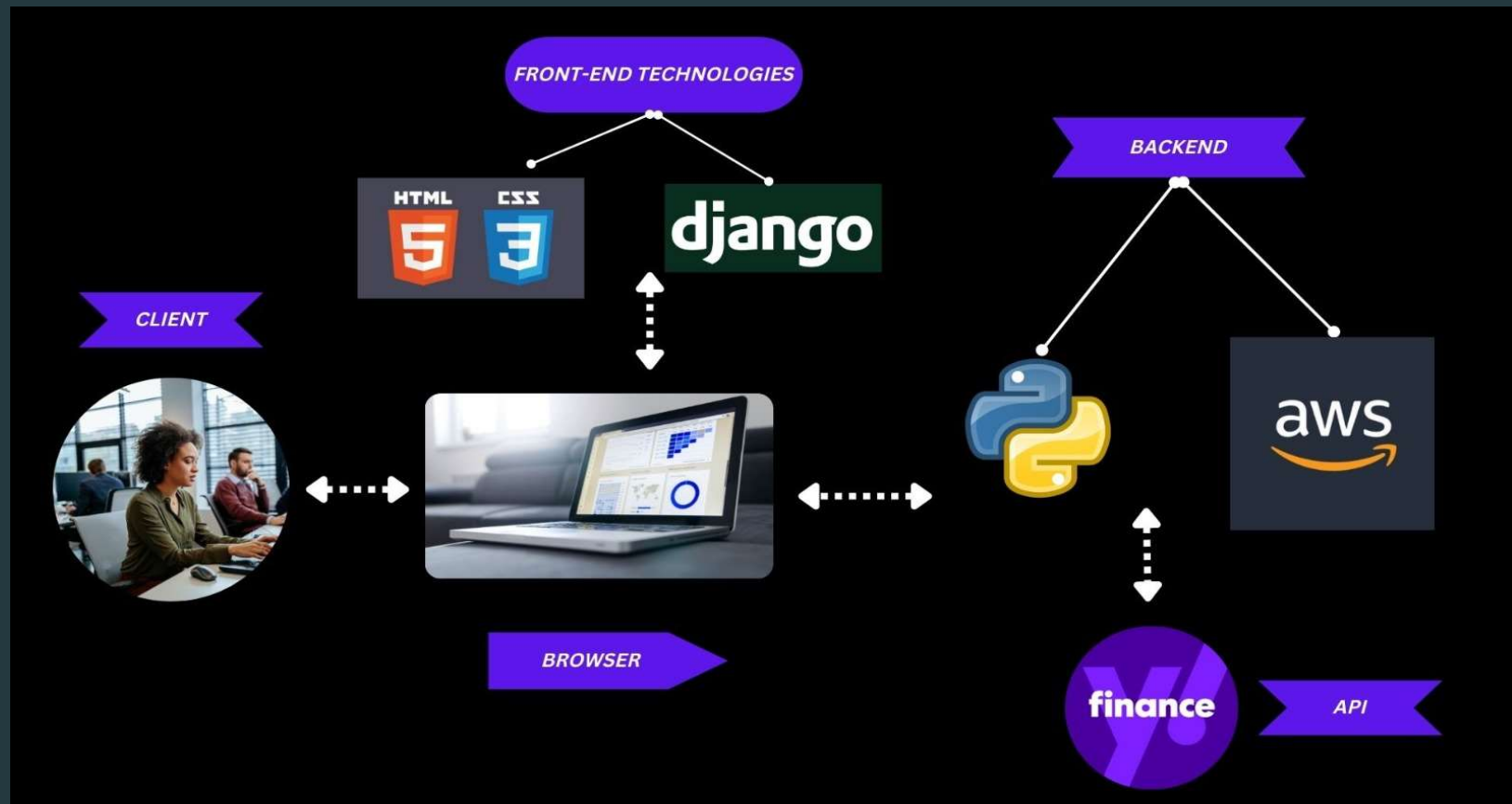
- Dosri helps Paul as he can review SR companies with a sustainable business plan and can get more accurate information for investment.
- Dosri helps provide insights into the company's financial growth with user friendly UI.
- As Paul is completes his review process; Dosri provides quick links to investment brokerages in real-time.



MVP

- User can enter company name in search bar, Search bar detects and gives automatic recommendation of a company name before entering full details
- Once the company name is entered user should be able to click submit button , Resulted ESG Data is displayed in Tabular forms
- Environmental score of a particular company will be displayed individually apart from ESG total rating, Company's information is displayed and it shows along with the environmental score
- Environmental, social and governance total ESG score to determine corporate sustainability , Resulted ESG Data is displayed in Tabular forms
- Historical data of a company is also available in DOSRI website, Data is returned in Tabular form.

Architecture Design



LOOKING FORWARD INTO THE SEMESTER

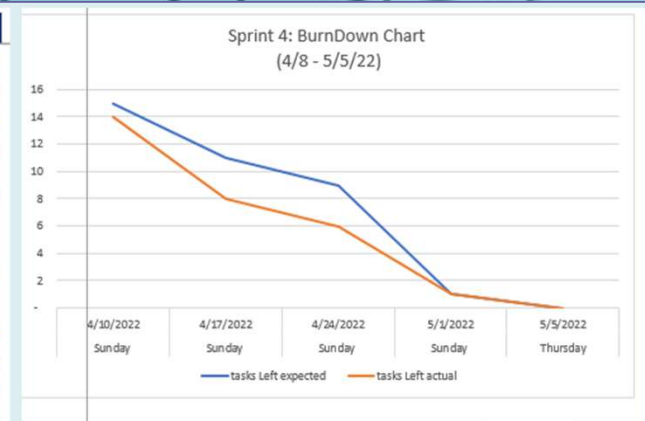
This semester our team is considering enhancing our product roadmap with various features that will expand our offers. We are considering:

- Login + Password UI/UX for savings searches
- Visualization tools for metrics
- Database for storing user data
- Implement AWS & MySQL DB



SPRINT 4: COMMITTED TASKS AND STORIES

Sprint	Description	Priority	Status	Goal date	MileStone
Sprint 4	Testing each feature against user journey	High Priority	Complete	4/10/2022	Deliverable 4 - Presentation Deck
Sprint 4	Create test cases	High Priority	Complete	4/10/2022	Deliverable 4 - Presentation Deck
Sprint 4	Weekly stand up meetings (Retrospective) 8	High Priority	Complete	4/10/2022	Deliverable 4 - Presentation Deck
Sprint 4	add and test error handling for search form	High Priority	Complete	4/17/2022	Deliverable 4 - Presentation Deck
Sprint 4	test page visuals on different screen sizes and document where UI needs to be more responsive	High Priority	Complete	4/17/2022	Deliverable 4 - Presentation Deck
Sprint 4	run performance tests to see page load times. Then see where performance enhancement can be added for better page load	High Priority	Complete	4/17/2022	Deliverable 4 - Presentation Deck
Sprint 4	Weekly stand up meetings (Retrospective) 9	High Priority	Complete	4/17/2022	Deliverable 4 - Presentation Deck
Sprint 4	Revise presentation slides from Deliverable 1 - 2	High Priority	Complete	4/24/2022	Deliverable 4 - Presentation Deck
Sprint 4	Make change to technical Paper	High Priority	Complete	4/24/2022	Deliverable 4 - Presentation Deck
Sprint 4	Update user personas to reflect professor notes	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	Update Product Roadmap for Fall'22 based on current Sprint completions	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	Complete Final Report	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	User Manual	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	Installation Manual	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	Update Github Wiki	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	Final Report	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	Peer Review 4	High Priority	Complete	5/1/2022	Deliverable 4 - Presentation Deck
Sprint 4	Deliverable 4: Present MVP - Live Demo	High Priority	Complete	5/5/2022	Deliverable 4 - Presentation Deck



Total tasks in Scope		18	18
timeline		tasks Left	
date	day	expected	actual
Sunday	4/10/22	15	14
Sunday	4/17/22	11	8
Sunday	4/24/22	9	6
Sunday	5/1/22	1	1
Thursday	5/5/22	-	0

Out of 18 tasks in scope for Sprint 4, the team was able to fully complete all 18 on schedule. The was no extra time available was enough to begin new work that was out of scope for this semester.

SPRINT 4 VS SPRINT 5

COMPARISON

Sprint 4

- We implemented front end UI
 - Didn't complete CSS/HTML
- We implemented Yahoo Finance API
- Create search bar function against API to call financial data related to specific company selected in the search bar
- We data grid to present historical data from API for the selected company
- Begun designing UI/UX

Sprint 5

- Completed front end UI with CSS/HTML
 - Continuous work in progress
- Researched backend for implementing new features that require RDS (i.e., AWS)
- We included data metrics in dynamic visualization tools i.e., Graph

NEW TECHNOLOGIES:



amazon
web services

HTML/CSS – Sprint 5

- CSS stands for Cascading Style Sheets. CSS describes how HTML elements are to be displayed on screen, paper, or in other media. CSS saves a lot of work. It can control the layout of multiple web pages all at once. External stylesheets are stored in CSS files.

AWS - TBD

- Amazon Web Services, Inc. is a subsidiary of Amazon that provides on-demand cloud computing platforms and APIs to individuals, companies, and governments, on a metered pay-as-you-go basis.

SPRINT 5

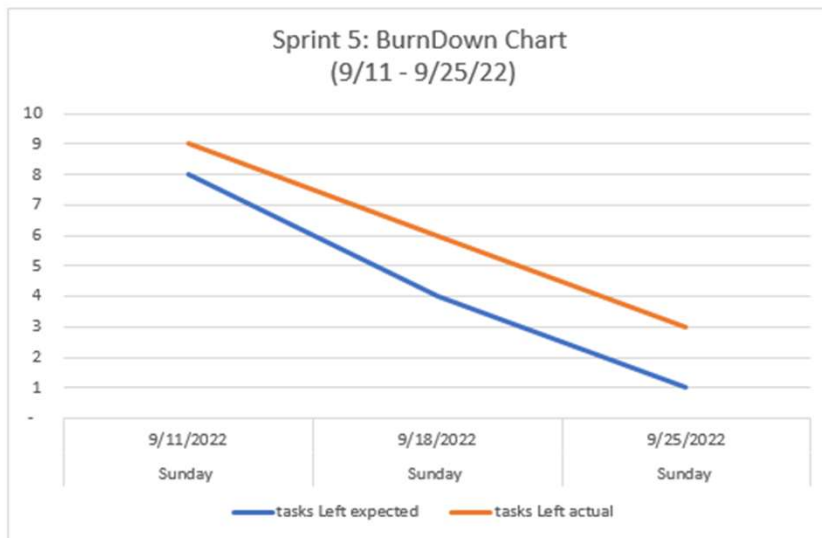
SPRINT 5: COMMITTED TASKS AND STORIES

Sprint	Description	Priority	Status	Goal date	MileStone
Sprint 5	Need to purchase a website domain	Low Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	Update user personas to reflect professor	Medium Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	Update Product Roadmap for Fall'22 based on current Sprint completions	High Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	Select Cloud platform to host user data	High Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	Review Spring'22 UI design for front end and make modifications where applicable	Medium Priority	Complete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	Create new UI to factor in login, password	Medium Priority	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	Implement AWS + MySQL DB for login/password	High Priority	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	Installation Manual	High Priority	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	Peer Review 5	High Priority	Complete	9/25/2022	Deliverable 5 - Presentation Deck
Sprint 5	Deliverable 5: Present MVP - Live Demo	High Priority	Complete	9/25/2022	Deliverable 5 - Presentation Deck
Sprint 5	Revise presentation slides from Deliverable 5	Medium Priority	Complete	9/25/2022	Deliverable 5 - Presentation Deck

We're currently at a 12.6% velocity in Sprint 5. Looking to improve on our Rate by being more precise on what we think we can finish within a sprint by considering holidays, fixing bugs etc.

SPRINT 5: BURNDOWN CHART

Sprint	JIRA #	Description	Priority	Status	Goal date	MileStone
Sprint 5	SRIW-1	Need to purchase a website domain	Low Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-92	Update user personas to reflect professor	Medium Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-93	Update Product Roadmap for Fall'22 based on current Sprint completions	High Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-78	Select Cloud platform to host user data	High Priority	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-80	Review Spring'22 UI design for front end and make modifications where applicable	Medium Priority	Complete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-79	Create new UI to factor in login, password	Medium Priority	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-96	Implement AWS + MySQL DB for login/password	High Priority	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-84	Installation Manual	High Priority	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-87	Peer Review 5	High Priority	Complete	9/25/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-88	Deliverable 5: Present MVP - Live Demo	High Priority	Complete	9/25/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-90	Revise presentation slides from Deliverable 5	Medium Priority	Complete	9/25/2022	Deliverable 5 - Presentation Deck

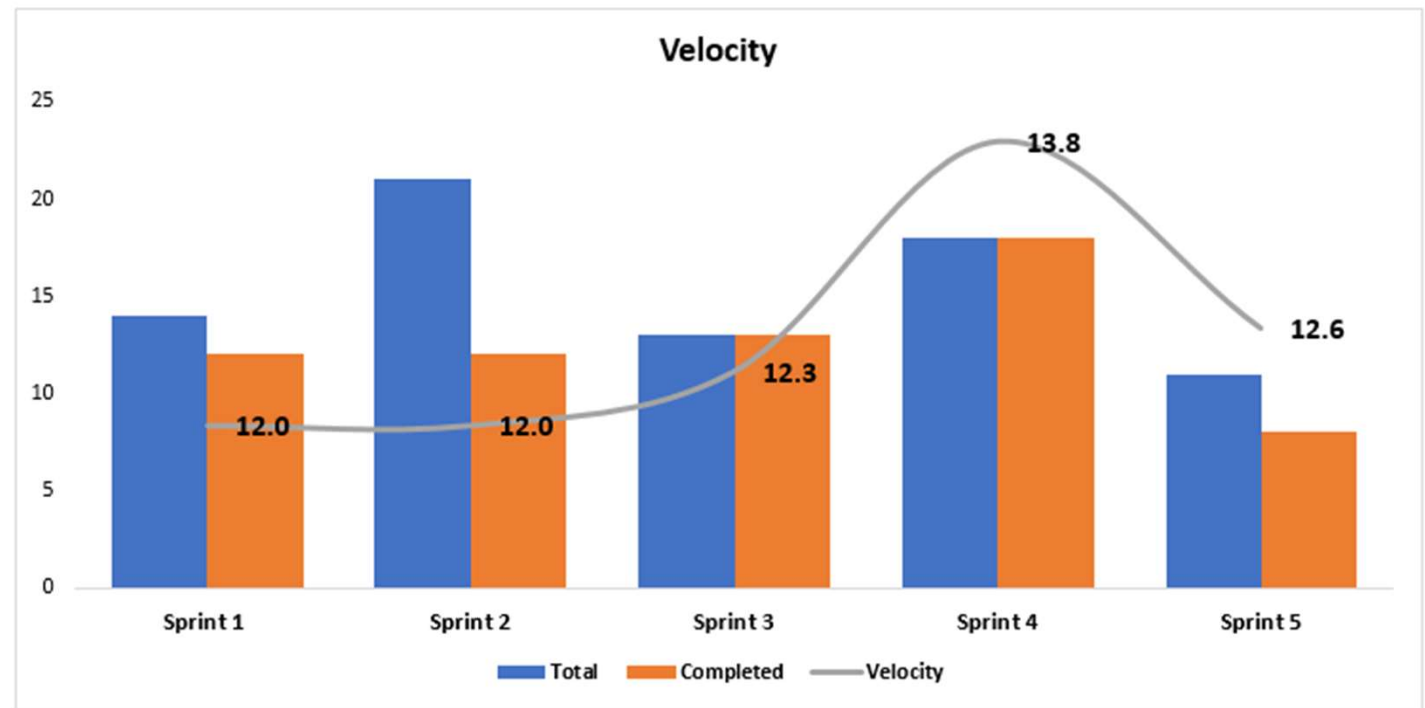


Total tasks in Scope		11	11
timeline		tasks Left	
date	day	expected	actual
Sunday	9/11/2022	8	9
Sunday	9/18/2022	4	6
Sunday	9/25/2022	1	3

In sprint 5, team was not able to implement new AWS backend and MySQL DB for login and password. We're currently at a velocity of 12.6%

Velocity :

We're currently at a 12.6% velocity in Sprint 5. Looking to improve on our Rate by being more precise on what we think we can finish within a sprint by considering holidays, fixing bugs etc.



Sprints	Total	Completed	Velocity
Sprint 1	14	12	12.0
Sprint 2	21	12	12.0
Sprint 3	13	13	12.3
Sprint 4	18	18	13.8
Sprint 5	11	8	12.6

SPRINT 5: USER STORIES & ACCEPTANCE CRITERIA

ID	As a	I want to	So that
Sprint 5	Paul, an Investment advisor	Have required information	I can advice and suggest to get good returns
Sprint 5	Donna as a recent graduate	Get a accurate picture at financial chart of the company	I can start Investing
Sprint 5	Carlos, as a Investor	Learn SRI impact on the company to ensure the sustainability of the company and invest accordingly	Invest in long-term stocks

PROJECT DEMO

DEMO OF NEW CAPABILITIES

Corporate Sustainability Score

Find the current stock price & ESG scores a company

Apple

Submit

AMZN (Amazon)

NYSE - NYSE Delayed Price. Currency in USD

Stock
Price

\$114.41



ENVIRONMENT, SOCIAL AND GOVERNANCE (ESG) RISK RATINGS

Total ESG
Score
20.39

Environmental Score
5.59

Social Score
14.8

Governance
Percentile
0.0

FINANCIALS

	2021-12-31	2020-12-31	2019-12-31	2018-12-31
Research Development	\$56052.0MM	\$42740.0MM	\$35931.0MM	\$28837.0MM

PRODUCT BACKLOG

PRODUCT BACKLOG

Type	Description	Priority	Status	Release Tag	Sprint
API	Add Google articles API	High Priority	WIP	V2	Sprint 6
Feature	Link button for 'invest now' to 3rd party brokerage website	High Priority	WIP	V2	Sprint 6
Feature	Create user Login and password and settings page UI/UX and workflow	High Priority	WIP	V2	Sprint 6
Backend	Implement RDS, Lambda and AWS dev environment to support creating user login/passwords	High Priority	WIP	V2	Sprint 6
Feature	Allow user to compare two companies financial position	High Priority	WIP	V2	TBD
Backend	Implement Artificial Intelligence (ML)	Low Priority	WIP	V2	TBD
Feature	Implement new metrics for searched company's financial position	Medium Priority	WIP	V2	TBD

SPRINT 6 STORIES IN SCOPE

▼ SRIW Sprint 6

✎ Add dates

(8 issues)

0

0

0

Start sprint

⋮

📌 SRIW-69

Create login page for DOSRI website

TO DO ▼

👤

📌 SRIW-70

Improve CSS and front end of application (Continuous process)

TO DO ▼

👤

📌 SRIW-71

Add buttons and finalize styling/font to frontend

TO DO ▼

👤

📌 SRIW-73

Filter raw data from API in backend according to project requirement

TO DO ▼

👤

📌 SRIW-75

User friendly front end and search engine optimization

TO DO ▼

👤

📌 SRIW-76

Generating google articles of a selected company into DOSRI website

TO DO ▼

👤

📌 SRIW-78

Authenticate login using gmail/facebook instead of local DB

TO DO ▼

👤

📌 SRIW-79

adding contact us page for any customer feedback and improvements

TO DO ▼

👤

+

Create issue

RETROSPECTIVES

What went well

- Team collaborative effort to make major changes to presentation
- Group meetings multiple times a week to make sure roadblocks are identified and addressed in a timely fashion

What needs improvement

- Timelines for executing stories in scope for current sprints need to be enforced to avoid mid sprint changes
- Improving our product roadmap by priority and dates

Next Step

- Need to read documentation for AWS deployment
- Need to consider workflow and design for login and password interface

THANK YOU!