



Instructor: Henry Wong

DOSRI

AMPLIFYING SOCIALLY RESPONSIBLE INVESTING (SRI)

PRESENTATION 8

Team 1: Six Underground

Presented by:

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Jephthe Louis-Jacques

Naga Sai Kiran Nimmakayala

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Team Members



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Developer



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QA Analyst



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Developer



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Cloud Engineer



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Tester

PROBLEM STATEMENT

As more investors commit to investing in companies that are socially responsible, these progressive investors struggle to find the metrics that go beyond traditional line items such as traditional performance and expenses. Socially conscious investors struggle to find the metrics that highly business practices that align with their values.

Here is the opportunity we plan to capitalize on, “DOSRI” is a free website that provides investors insight about publicly traded companies social rating base on the ‘Environmental, Social, & Governance’ (ESG) standard rating. Dorsi plans on serving this growing community of investors with thorough analysis of company performances that expand beyond traditional financials along with quick access to investing in these Socially Responsible companies.

PROJECT DESCRIPTION

WHAT IS DOSRI?

*Socially Responsible
Investing (SRI)*

- “Dosri” is a free website that provides investors insight about publicly traded companies social rating base on the ‘Environmental, Social, & Governance’ (ESG) standard rating and more.
- Provides investors with latest stock price, related articles 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

PERSONAS

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 SRI 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.



MINIMAL VIABLE PRODUCT (MVP)

Features:

- Provide stock price, ESG standard rating, Financial reports for the company currently being searched
- Allow user to login and create password to store their historical search data
- Generate latest online news for company currently searched
- Provide quick access to third party platform investment firm (Fidelity)

TECHNOLOGIES

HTML



CSS



django



Bootstrap



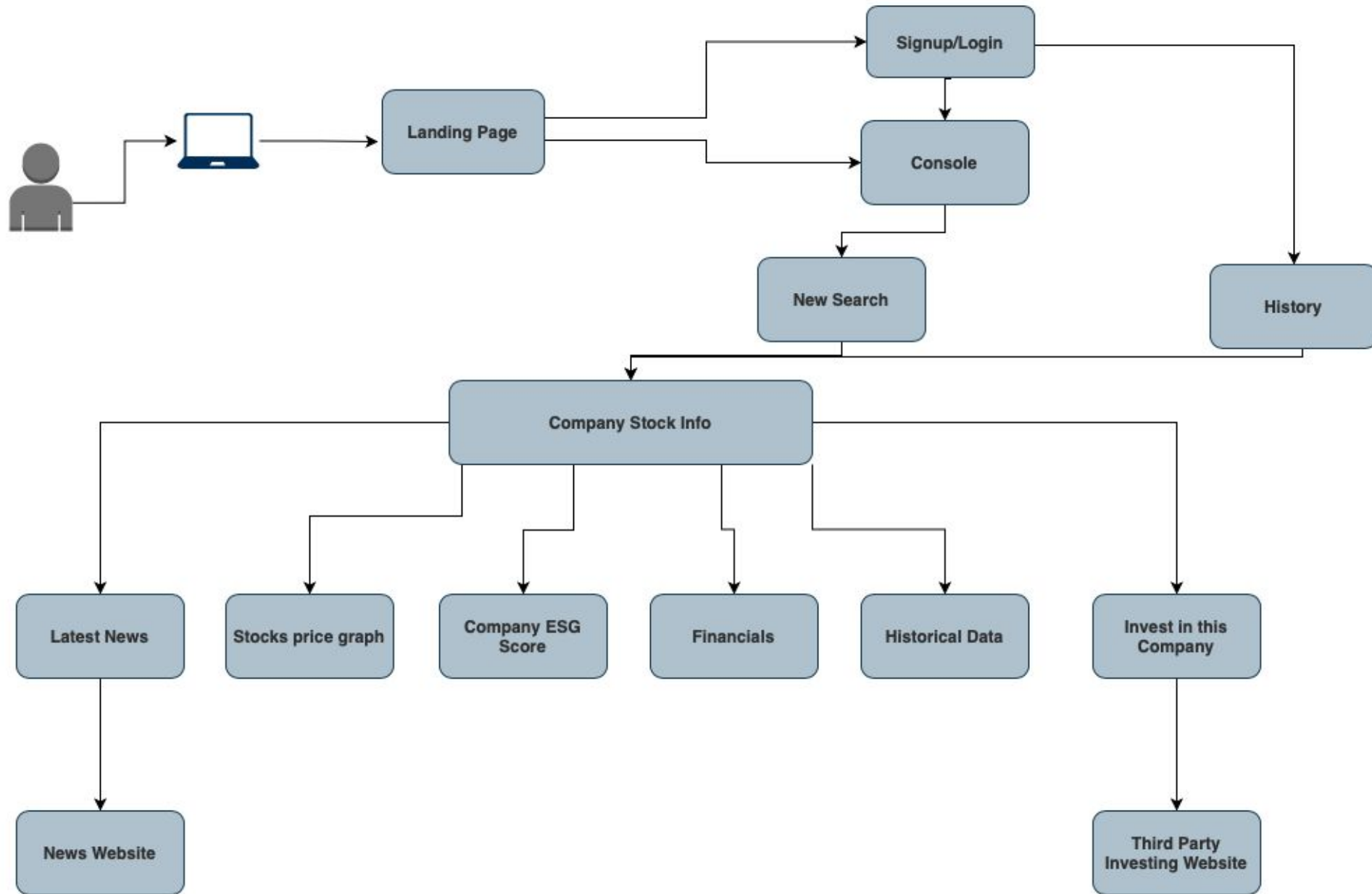
+

yahoo!
finance



miro

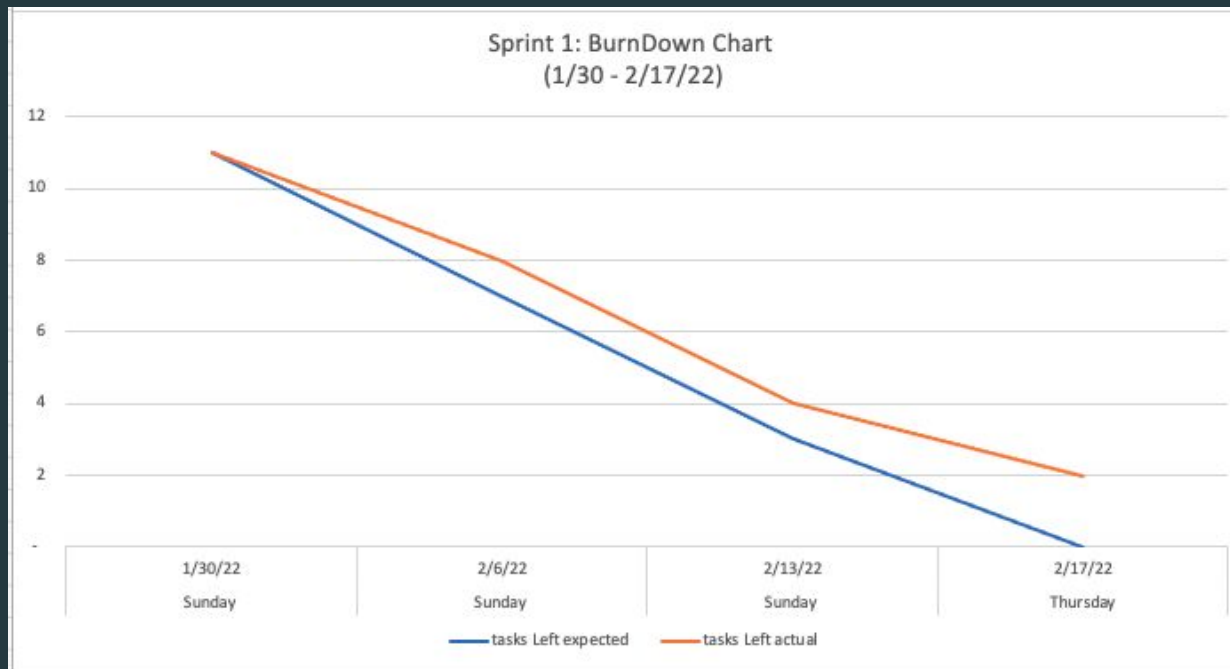
CONCEPTUAL ARCHITECTURE



SPRINT 1 TO SPRINT 4 RECAP

Sprint 1:

- Describe project & Output Goals
- Created personas for user base
- Constructed write detail customer journey for UI/UX

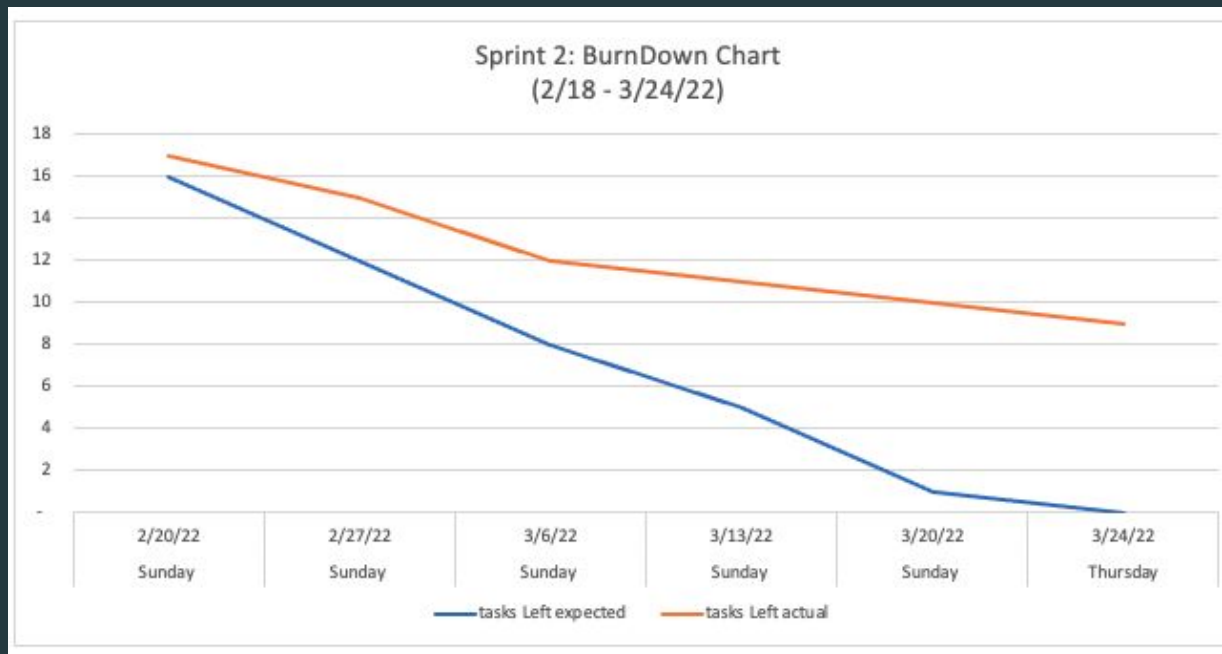


Total tasks in Scope		15	15
timeline		tasks Left	
date	day	expected	actual
Sunday	1/30/22	11	11
Sunday	2/6/22	7	8
Sunday	2/13/22	3	4
Thursday	2/17/22	-	2

Out of 15 tasks in scope for Sprint 1, 13 were fully completed. The remaining two were moved to Sprint 2

Sprint 2:

- Identified APIs available for company stock prices
- Created Database schema for objects and attributes
- Created sketch of tentative UI



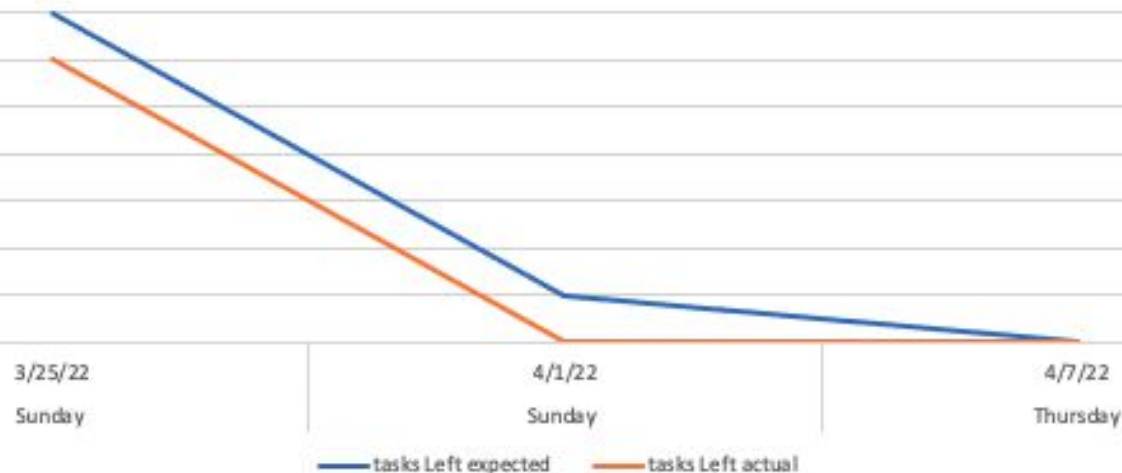
Total tasks in Scope		20	20
timeline		tasks Left	
date	day	expected	actual
Sunday	2/20/22	16	17
Sunday	2/27/22	12	15
Sunday	3/6/22	8	12
Sunday	3/13/22	5	11
Sunday	3/20/22	1	10
Thursday	3/24/22	-	9

Out of 20 tasks in scope for Sprint 2, 11 were fully completed. The remaining 9 were assessed and moved to Sprint 3 and other low priority items were moved to backlog instead of sprint 3

Sprint 3:

- Created website UI/UX
- Coded the front end UI with CSS/HTML
- Impleted Yahoo Finance API

Sprint 3: BurnDown Chart
(3/25 - 4/7/22)

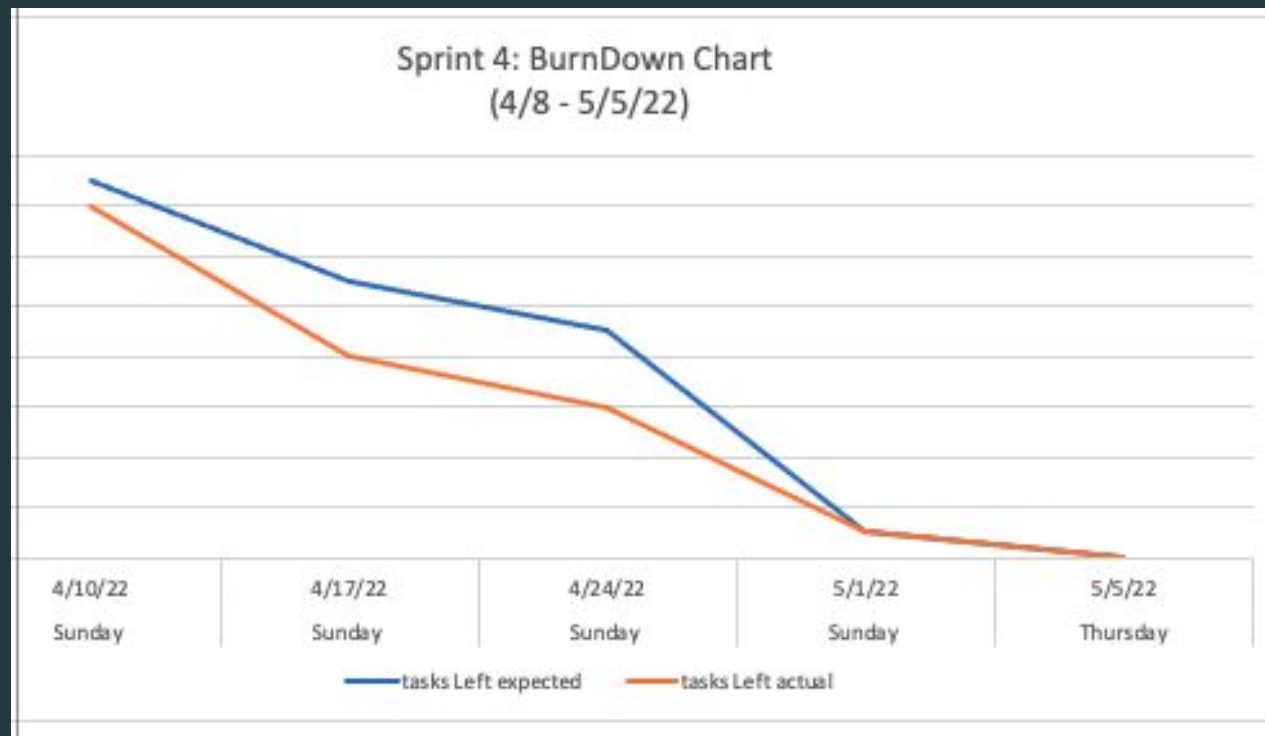


Total tasks in Scope		13	13
timeline		tasks Left	
date	day	expected	actual
Sunday	3/25/22	7	6
Sunday	4/1/22	1	0
Thursday	4/7/22	-	0

Out of 13 tasks in scope for Sprint 3, team was able to fully complete all 13 ahead of schedule. The team used the extra time to begin testing features ahead of schedule but not reflected in this Sprint.

Sprint 4:

- Created Test cases for user stories
- Revised user personas based on professor feedback
- Logged Product Roadmap in anticipation of Fall'22 project goals
- Make changes to previous bugs related to API and UI



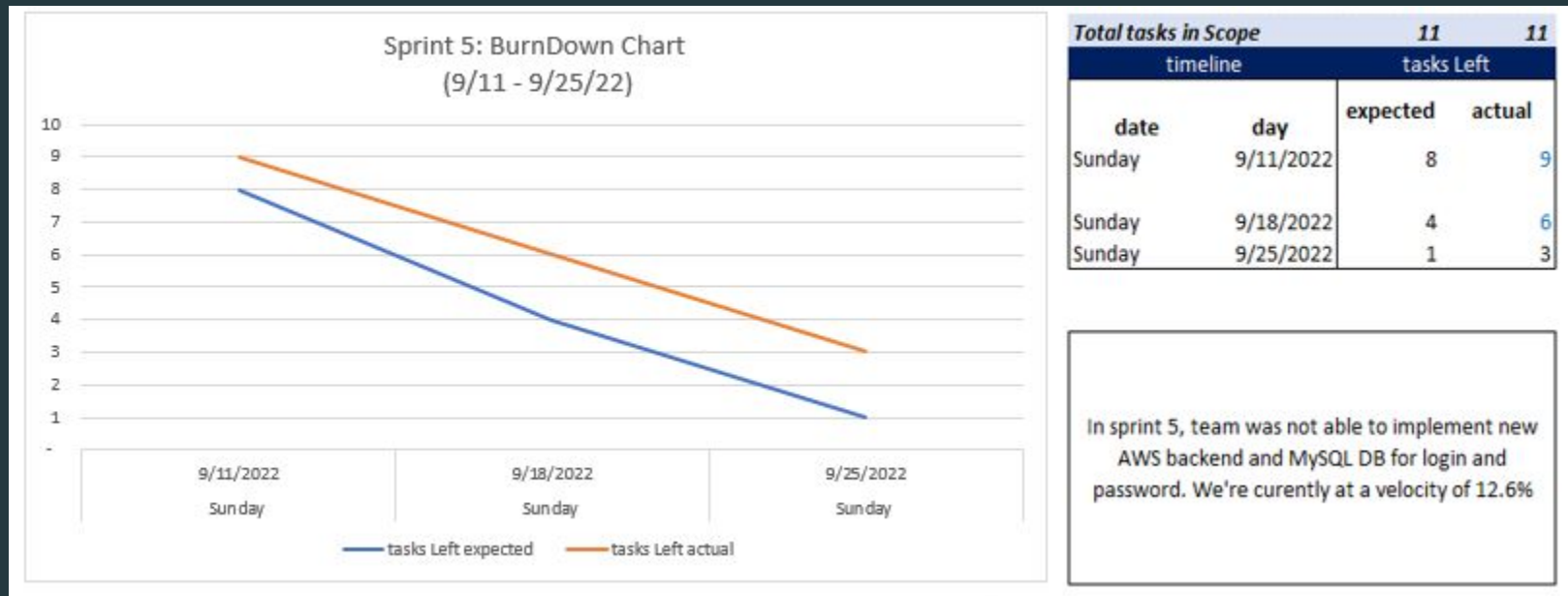
Total tasks in Scope		18	18
timeline		tasks Left	
date	day	expected	actual
Sunday	4/10/22	15	14
Sunday	4/17/22	11	8
Sunday	4/24/22	9	6
Sunday	5/1/22	1	1
Thursday	5/5/22	-	0

Out of 18 tasks in scope for Sprint 4, the team was able to fully complete all 18 on schedule. The wasn't any extra time available to begin new work that was out of scope for this semester.

SPRINT 5 TO SPRINT 7 RECAP

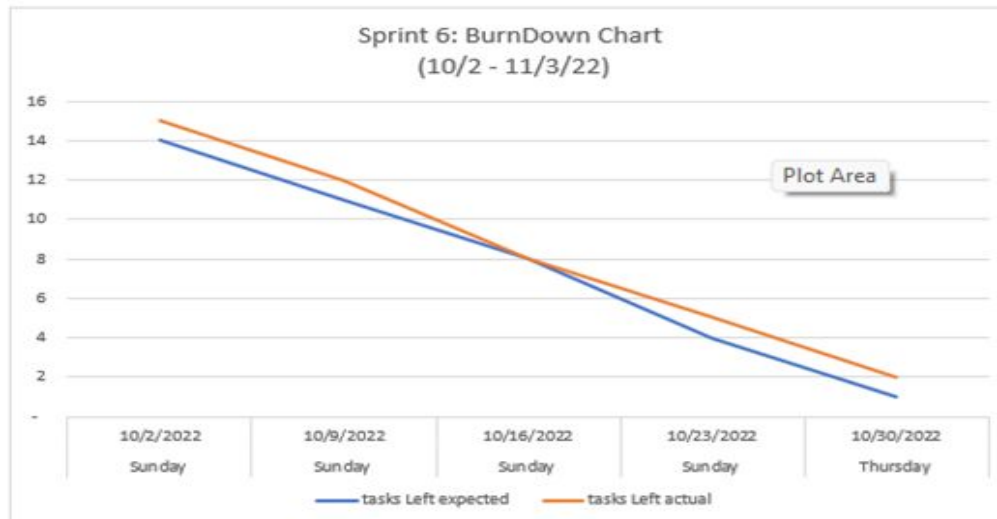
Sprint 5:

- Enhanced the front end UI with CSS/HTML.
- Researched on backend for implementing new features that requires RDS (i.e. AWS)
- We included data metrics in dynamic visualization tool i.e., Graph.



Sprint 6:

- User login feature has been implemented
- Invest in this company button will redirect user to third party where user can now invest into stocks.
- PNG-formatted graphs can be downloaded to give users access to more stock insights.
- The sequence of historical data in tabular form has been changed so that users can view the most recent data first and then older data.

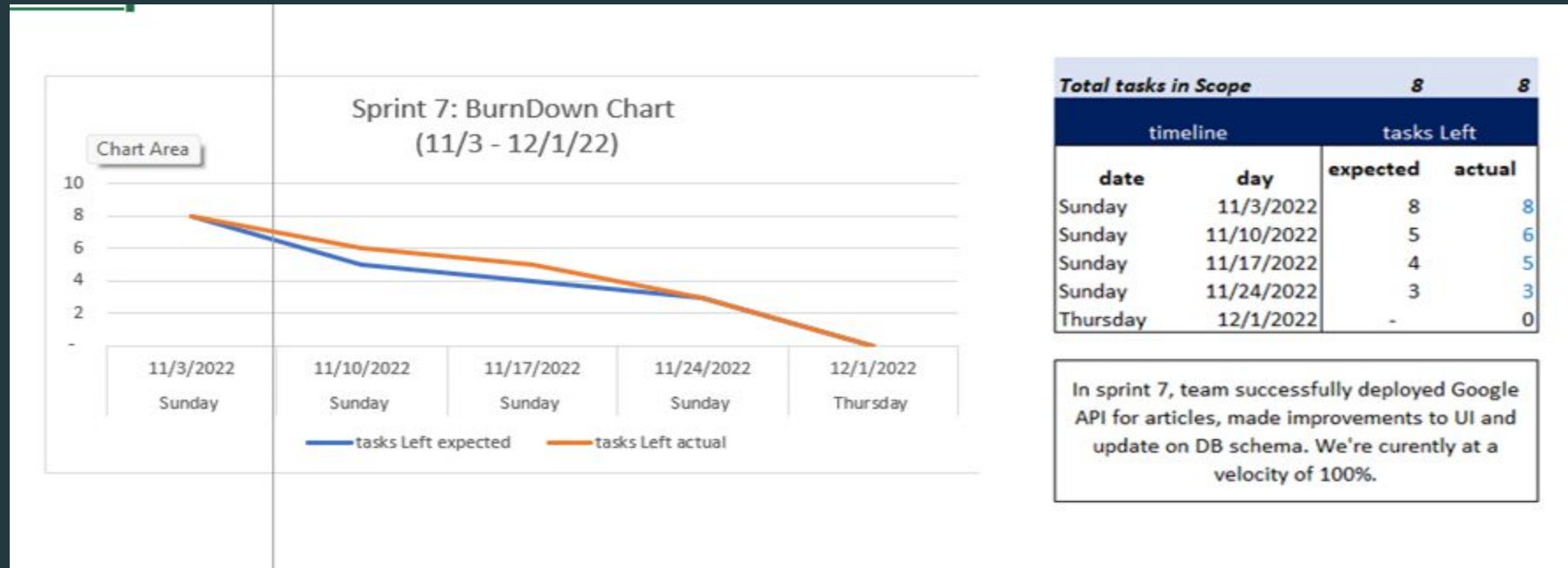


Total tasks in Scope		17	17
timeline		tasks Left	
date	day	expected	actual
Sunday	10/2/2022	14	15
Sunday	10/9/2022	11	12
Sunday	10/16/2022	8	8
Sunday	10/23/2022	4	5
Thursday	10/30/2022	1	2

In sprint 5, team was not able to implement new login and password functionality with MySQL DB. We're currently at a velocity of 87.7. 10/23 week was light because of midterms. Opted out of AWS cloud since requires credit card for mthly billing

Sprint 7:

- Improved UI for login-page and sign-up page.
- Added search history tab for registered users.
- Implemented a new headlines section for users to know more about companies current scenario.
- The sequence of historical data in tabular form has been changed so that users can view the most recent data first and then older data.



SPRINT 7 VS SPRINT 8

SPRINT 7

- Improved UI for login-page and sign-up page.
- Added search history tab for registered users.
- Implemented a new headlines section for users to know more about companies current scenario.
- The sequence of historical data in tabular form has been changed so that users can view the most recent data first and then older data.

SPRINT 8

- Enhanced the UI on console page.
- Added date range filter for better analysis of the stock trends and companies financial history.

IMPROVEMENTS MADE FROM PROFESSOR FEEDBACK

- Update the Acceptance criteria with “given, when & then” keywords (For User story - AS A, WANT TO, SO THAT). (Page 24)
- Can use bullet points for acceptance criteria.(Page 24)
- Put the slide number for the professor feedback slide.(Done)
- Team velocity needs improvement.(Page 29)

PRODUCT BACKLOG

JIRA ID	Description	Priority	Point	Status	Sprint
SRIW-112	As a New social Investor i want to have a wishlist for the companies i have invested in or companies i plan to invest in, so that i can keep a track on the companies of my interest.	Medium Priority	3	Not Complete	Sprint 8
SRIW-113	As a Long-term investor Carlos wants to have a date range filter so that, he can analyze the data for the specific date range.	High Priority	5	Completed	Sprint 8
SRIW-114	As a Investment advisor i want to Be able to share my wishlist portfolio to my clients so that, my client can refer to the companies and the data related with them for their reference.	Medium Priority	3	Not Complete	Sprint 8

SPRINT BACKLOG

Sprint	JIRA ID	Description	Priority	Point	Status	Goal Date
Sprint 8	SRIW-112	As a New social Investor i want to have a wishlist for the companies i have invested in or companies i plan to invest in, so that i can keep a track on the companies of my interest.	Medium Priority	3	Not Complete	12/11/2022
Sprint 8	SRIW-113	As a Long-term investor Carlos wants to have a date range filter so that, he can analyze the data for the specific date range.	High Priority	5	Completed	12/12/2022
Sprint 8	SRIW-114	As a Investment advisor i want to Be able to share my wishlist portfolio to my clients so that, my client can refer to the companies and the data related with them for their reference.	Medium Priority	3	Not Complete	12/15/2022
Sprint 8	SRIW-123	Update Technical paper, Installation manual and User manual.	Medium Priority	3	Completed	12/16/2022
Sprint 8	SRIW-124	Create Deliverable 8 presentation.	High Priority	5	Completed	12/16/2022
Sprint 8	SRIW-125	Record Deliverable 8 presentation and edit.	High Priority	5	Completed	12/17/2022
Sprint 8	SRIW-124	Update Wiki Page.	Medium Priority	3	Completed	12/18/2022

USER STORY & ACCEPTANCE CRITERIA

SRIW 113

User Story:

As a Long-term investor Carlos wants to have a date range filter so that, he can analyze the data for the specific date range.

Acceptance criteria:

- **Given:** that the investor is already on the Console page.
- **When:** he enters the company name and select a specific date range in the date range button besides the search box.
- **Then:** he can see the data for specified date range in history data tab.

SPRINT 8:

TEST CASES

USER STORY ID	TEST CASE ID	TEST CASES	EXPECTED RESULT	PASS/FAIL	TEST DATA
SRIW-113	SRIW-125	Have a date range filter	When Clicked on date button you can see the calendar below the button	Pass	User is able to see calendar to select date range
SRIW-113	SRIW-126	Have a date range filter	After selecting the date range we can see the data for specific date	Pass	Once the date rage is selected we can see the data to be visible for the specific date range

STORIES COMPLETED

USER STORY ID	AS A	I WANT TO	SO THAT	Acceptance Criteria
SRIW 113	Long-term Investor	Have a date range filter	he can analyze the data for the specific date range	<p>Given: that the investor is already on the Console page</p> <p>When: He enters the company name and select a specific date range in the date range button besides the search box.</p> <p>Then: He can see the data for specified date range in history data tab.</p>



STORIES NOT COMPLETED

USER STORY ID	AS A	I WANT TO	SO THAT
SRIW 112	New social Investor	Have a wishlist for the companies i have invested in or companies i plan to invest in	I can keep a track on the companies of my interest
SRIW 114	Investment advisor	Be able to share my Wishlist portfolio to my clients	My client can refer to the companies and the data related with them for their reference



METRICS

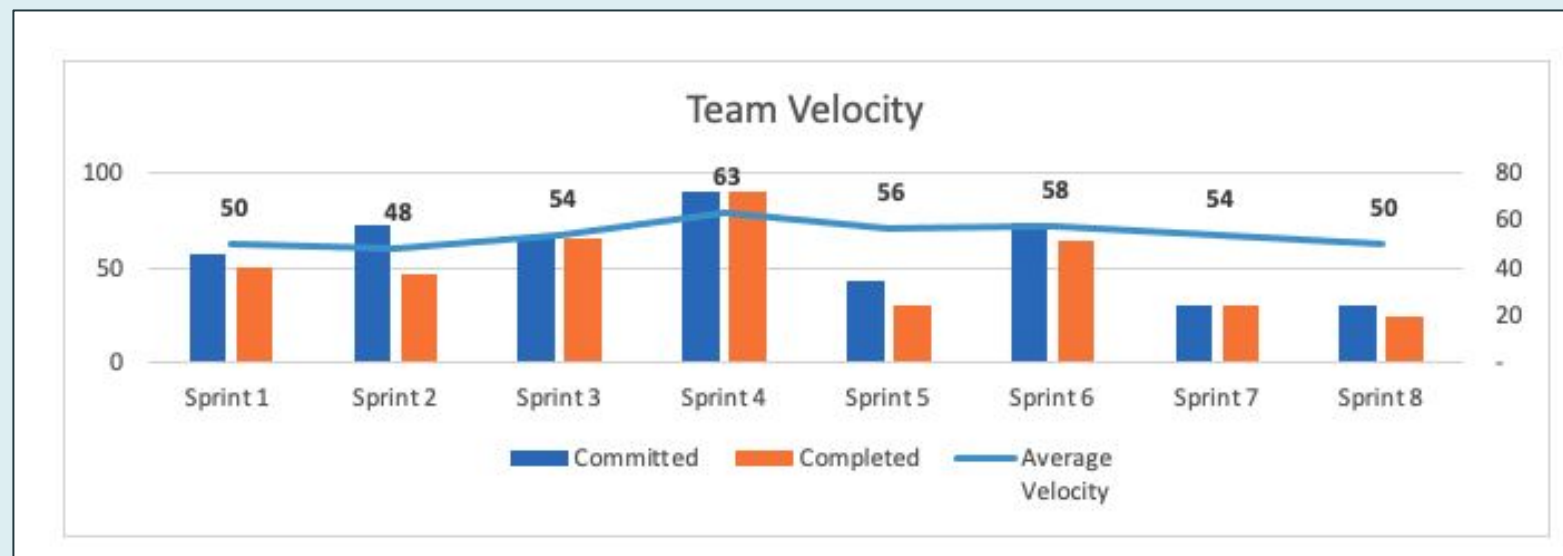
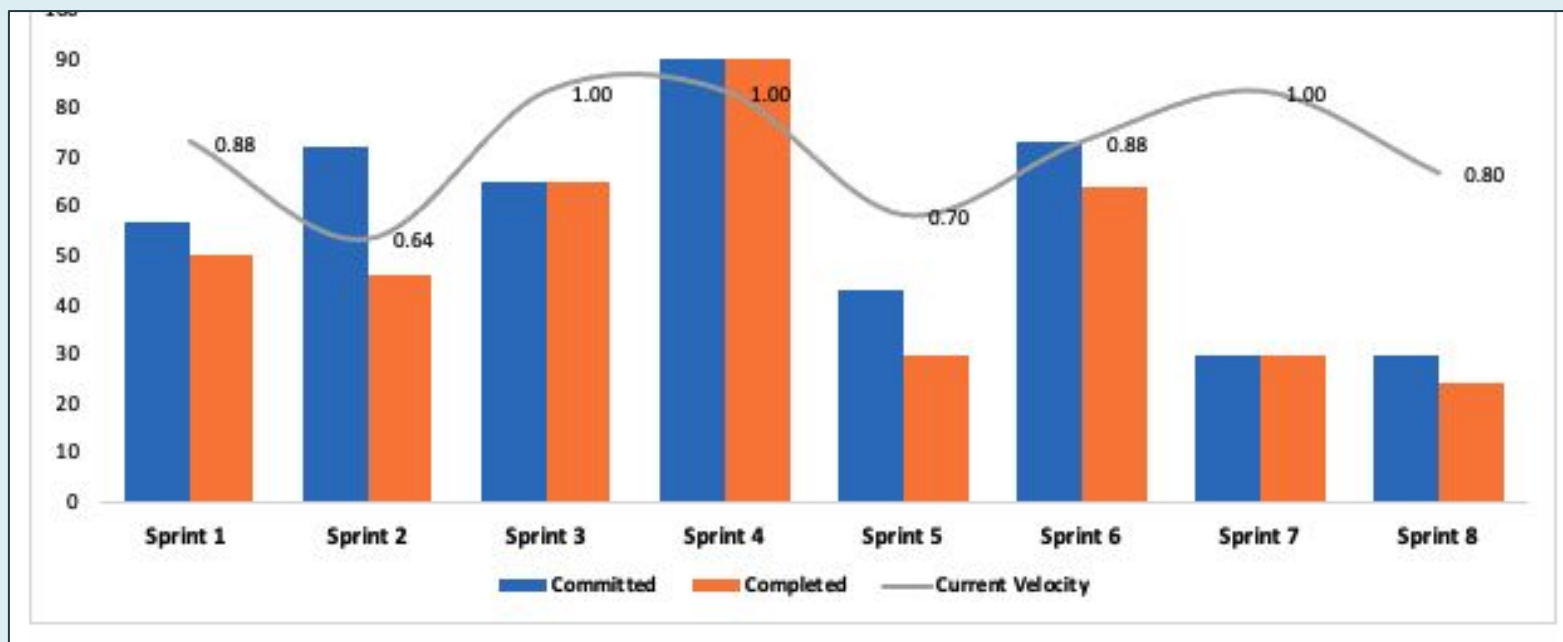
TEAM VELOCITY

BURNDOWN CHARTS

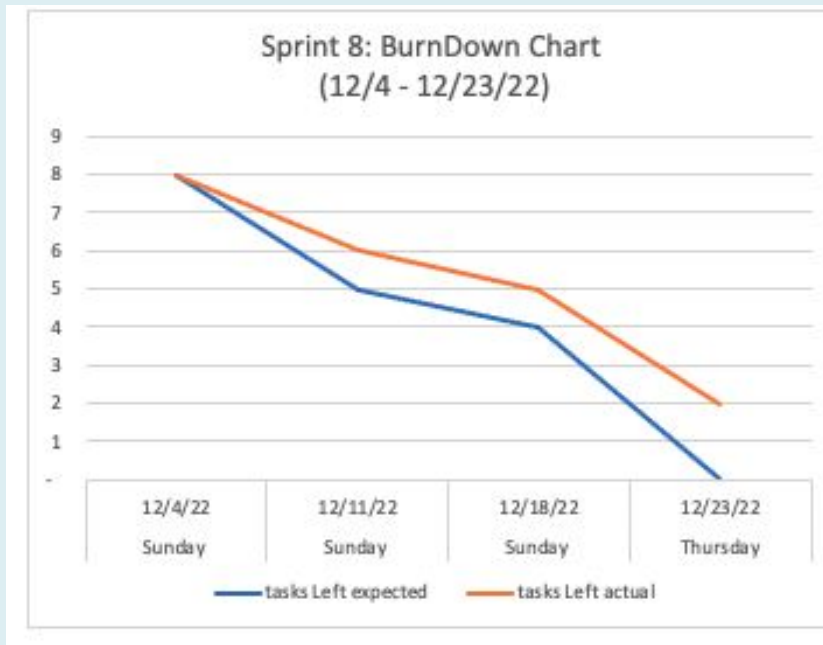
COMMITTED/ COMPLETED RATIO



SPRINT 8: Team Velocity



SPRINT 8: BURNDOWN CHART



Total tasks in Scope		8	8
timeline		tasks Left	
date	day	expected	actual
Sunday	12/4/22	8	8
Sunday	12/11/22	5	6
Sunday	12/18/22	4	5
Thursday	12/23/22	-	2

In sprint 8, team successfully deployed improved date range filter. We're currently at a velocity of 80%.

SPRINT 8:

METRICS

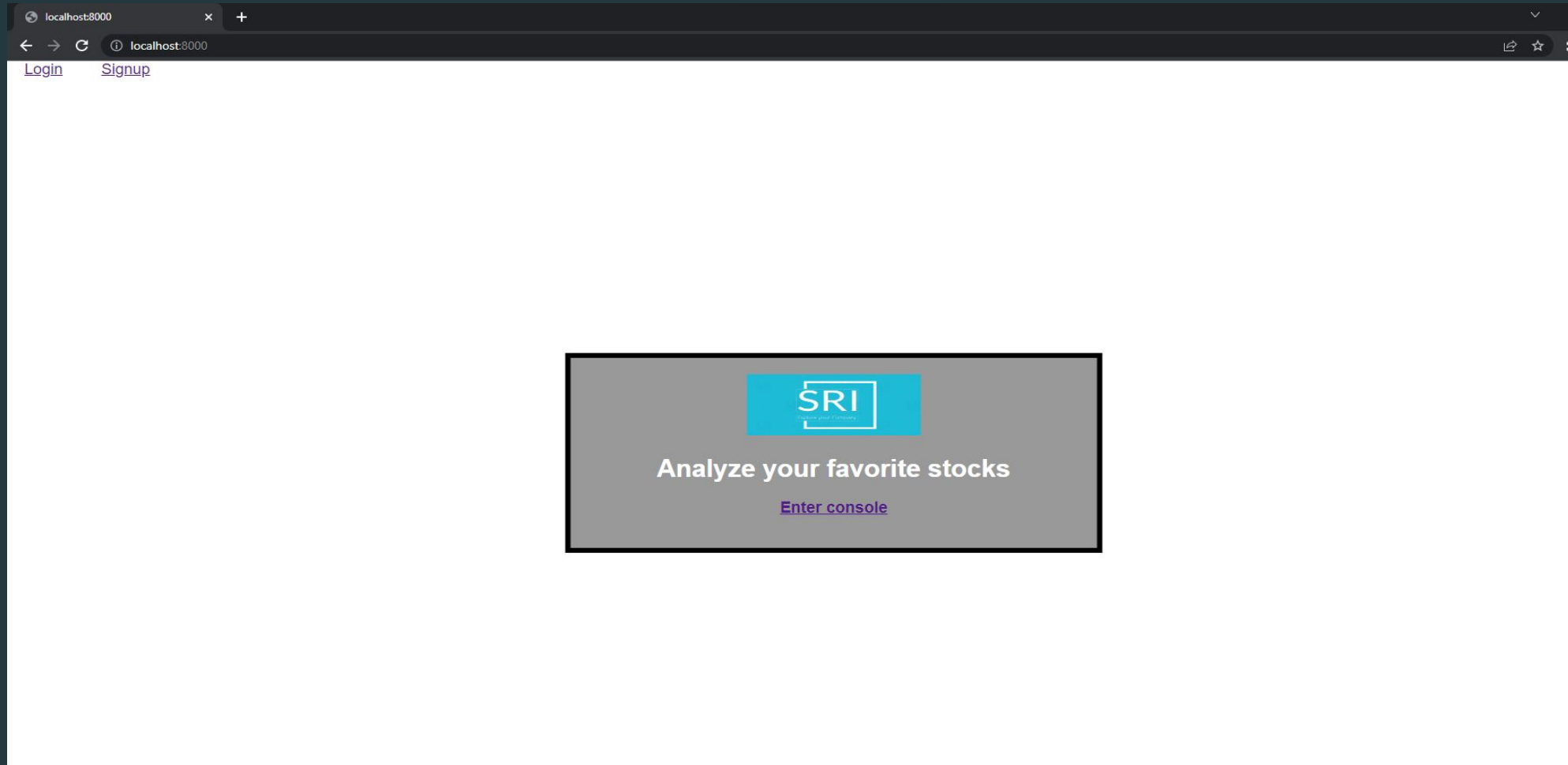
Sprints	Committed	Completed	Average Velocity	Current Velocity	Ratio
Sprint 1	57	50	50	0.88	88%
Sprint 2	72	46	48	0.64	64%
Sprint 3	65	65	54	1.00	100%
Sprint 4	90	90	63	1.00	100%
Sprint 5	43	30	56	0.70	70%
Sprint 6	73	64	58	0.88	88%
Sprint 7	30	30	54	1.00	100%
Sprint 8	30	24	50	0.80	80%

RETROSPECTIVES

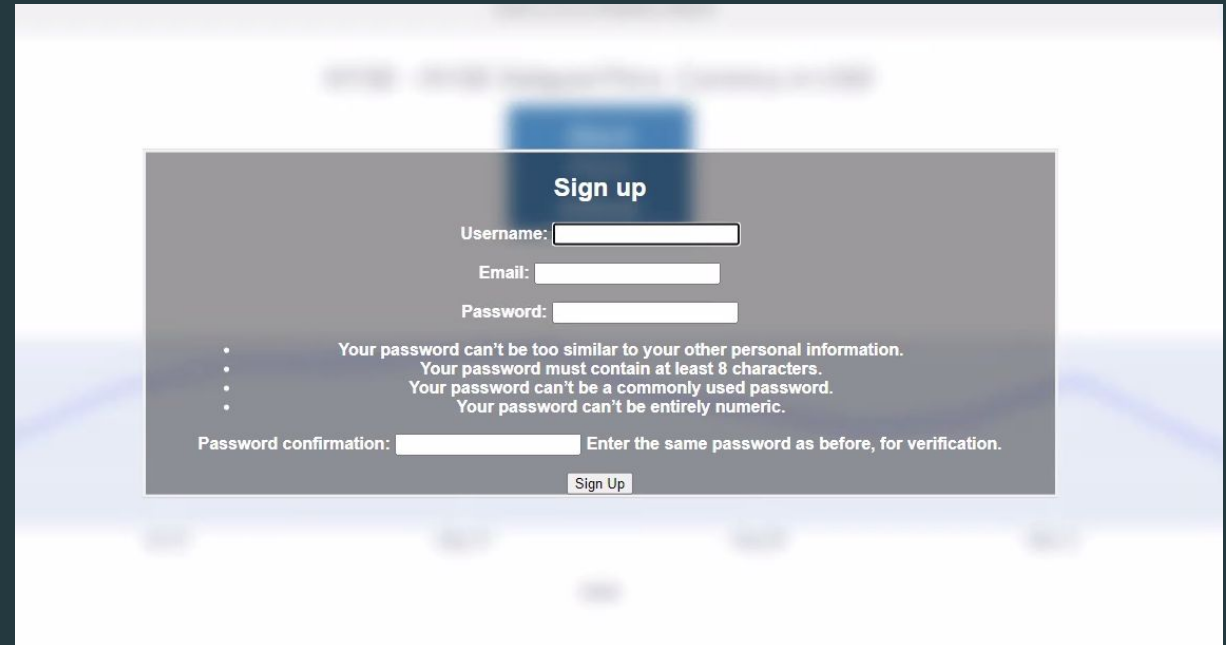
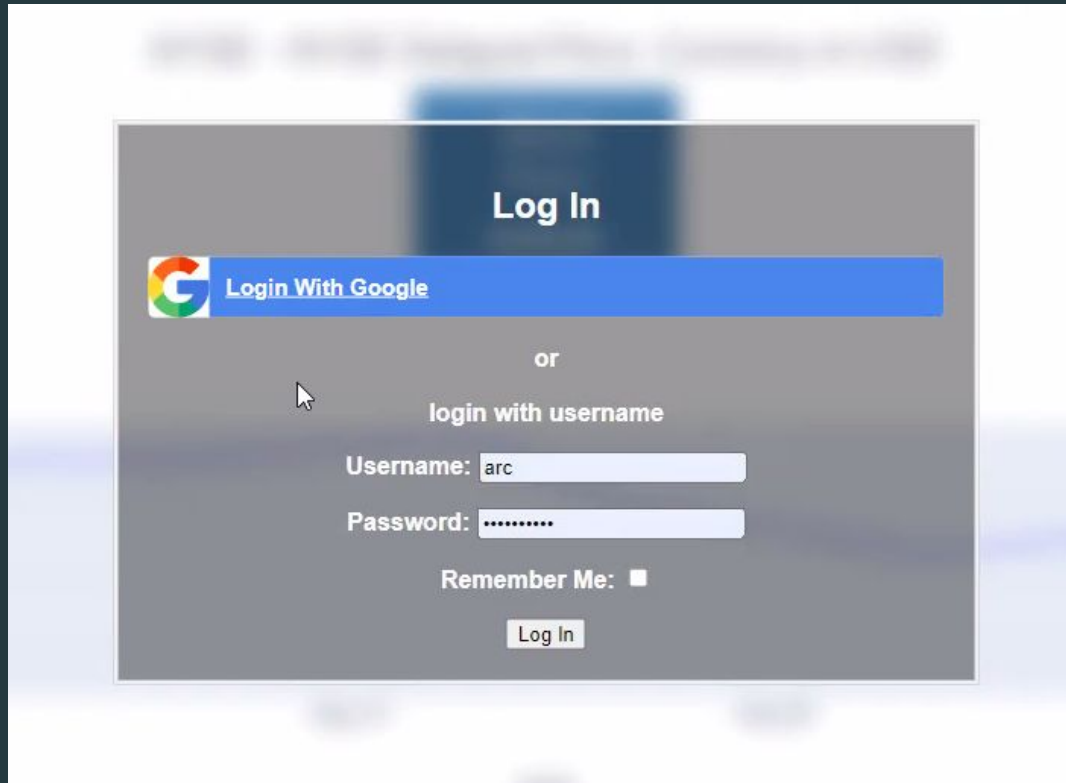
WHAT WENT WELL	WHAT NEEDS IMPROVEMENT	NEXT STEPS	Votes (OUT of 6)
- We finished the project within the time constraint identified early in the semester	- Better time management for debugging QA feedback in addition to working on new tasks and required user stories	-Attempting to measuring how long it takes to debug issues that arise in order to consider escalation time in addition to time needed for tasks	6
- Team communicated their individual tasks and kept everyone informed on their progress during stand up meetings	- All the documentation/notes related the sprint and/or project should be documented on a online platform for future reference when needed.	- Upload all individual files to Google drive and share the link with the team	5

PROJECT DEMO

SCREENSHOTS OF THE WEBSITE



SCREENSHOTS OF THE WEBSITE





Sign In
Home
History

Hi Guest! [\(go\)](#)

Corporate Sustainability Score

AMZN (Amazon)

Find the current stock price & ESG scores a company

08/23/2022 - 08/26/2022

Type In A Company Name

Submit

Want to specify date range? ✓

Latest in News

[Amazon shares have given up all of their gains from the pandemic. The company's stock skyrocketed in 2020 and held up in 2021 as shoppers ...](#)

[Amazon News. @amazonnews. The official account for news about. @Amazon . United States amazon.com/about Iscrizione: gennaio 2017.](#)

[Digital Newspaper Subscriptions ... The Washington Post, New York Times, Wall Street Journal, and more, delivered direct to your Kindle, iOS or Android device.](#)

NYSE- Price ✓

Price Graph ✓

ESG Score ✓ Environmental Score ✓ Social Score ✓ Governance Score ✓

Financials ✓

Historical ✓

HISTORIAL DATA

	Open	High	Low	Close	Volume	Dividends	Stock Splits
Date							
2022-08-26	136.550003	137.830002	130.500000	130.750000	53322700	0	0.0
2022-08-25	135.259995	137.419998	134.279999	137.279999	37496300	0	0.0

08/23/2022 - 08/26/2022

Type In A Company Name

Want to specify date range? ✓

Home

Console

History

Hi arc! (logout)

Search Result History

Name	Ticker	Created_At	Info
Amazon	AMZN	Nov. 29, 2022, 10:20 p.m.	Go
Apple	AAPL	Nov. 29, 2022, 10:20 p.m.	Go
T-Mobile	TMUS	Nov. 29, 2022, 10:21 p.m.	Go
Verisign	VRSN	Nov. 29, 2022, 10:21 p.m.	Go
Apple	AAPL	Nov. 29, 2022, 10:22 p.m.	Go
Adobe	ADBE	Nov. 29, 2022, 11 p.m.	Go
Apple	AAPL	Nov. 29, 2022, 11:53 p.m.	Go
Airbnb	ABNB	Nov. 29, 2022, 11:56 p.m.	Go

SCREENSHOTS OF THE API

```
import yfinance as yf
```

```
from serpapi import GoogleSearch
```

```
company_y = yf.Ticker(company_name)
dataFrame = company_y.sustainability
```

```
esg_data = pd.DataFrame.transpose(company_y.sustainability)
esg_data['company_ticker'] = str(company_y.ticker)
str_socialScore = str(esg_data['socialScore'].values)
socialScore = truncate(float(str_socialScore.strip('[]')),2)
str_environmentScore = str(esg_data['environmentScore'].values)
environmentScore = truncate(float(str_environmentScore.strip('[]')),2)
str_governancePercentile = str(esg_data['governancePercentile'].values)
if(str_governancePercentile == '[None]'):
    governancePercentile = 0.00
```

```
financials = company_y.financials
```

```
hist_graph = company_y.history(start="2021-07-04", end=date.today(), interval="1d")
```

GITHUB LINK

<https://github.com/CS691/Socially-Responsible-Investing-A-financial-website/wiki>



THANK YOU!