



# DOSRI

## AMPLIFYING SOCIALLY RESPONSIBLE INVESTING (SRI)

### PRESENTATION 5

*Team 1: Six Underground*

*Presented by:*

---

*Farhan Pasha Mohammed*

*Samarth Yadav*

*Harshal Patil*

*Kush Shah*

*Jephthe Louis-Jacques*

*Naga Sai Kiran Nimmakayala*

# AGENDA

- 1. TEAM MEMBERS ROLES
- 2. PROBLEM STATEMENT
- 3. PROJECT DESCRIPTION
- 4. PERSONAS
- 5. MVP
- 6. TECHNOLOGIES
- 7. ARCHITECTURE DIAGRAM
- 8. SPRINT 5 RECAP
- 9. IMPROVEMENTS
- 10. PRODUCT BACKLOG
- 11. SPRINT BACKLOG
- STORIES AND ACCEPTANCE CRITERIA
- TEST CASES FOR STORIES
- 12. METRICS
- 13. RETROSPECTIVE
- 14. SPRINT 7 STORIES
- 15. PROJECT DEMO - [GITHUB LINK](#)

# 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

# **PROBLEM STATEMENT**

**Are 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

- “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?

---

*Socially Responsible  
Investing (SRI)*

# **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.



# MVP

- Users can now log in, the feature has been made optional, and guests can still use this website without doing so.
- In the fully optimized search box, the user can input the name of the company.
- The "Invest in the Company" button will redirect users to third-party investment page.
- The user interface of DOSRI has been improved graphically and interactively.
- Graphs displayed can also be downloaded into PNG format and other features include zoom-in and zoom-out
- The stock price displayed on Dosri website and other websites is exactly correct.

# NEW TECHNOLOGIES:



## 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.

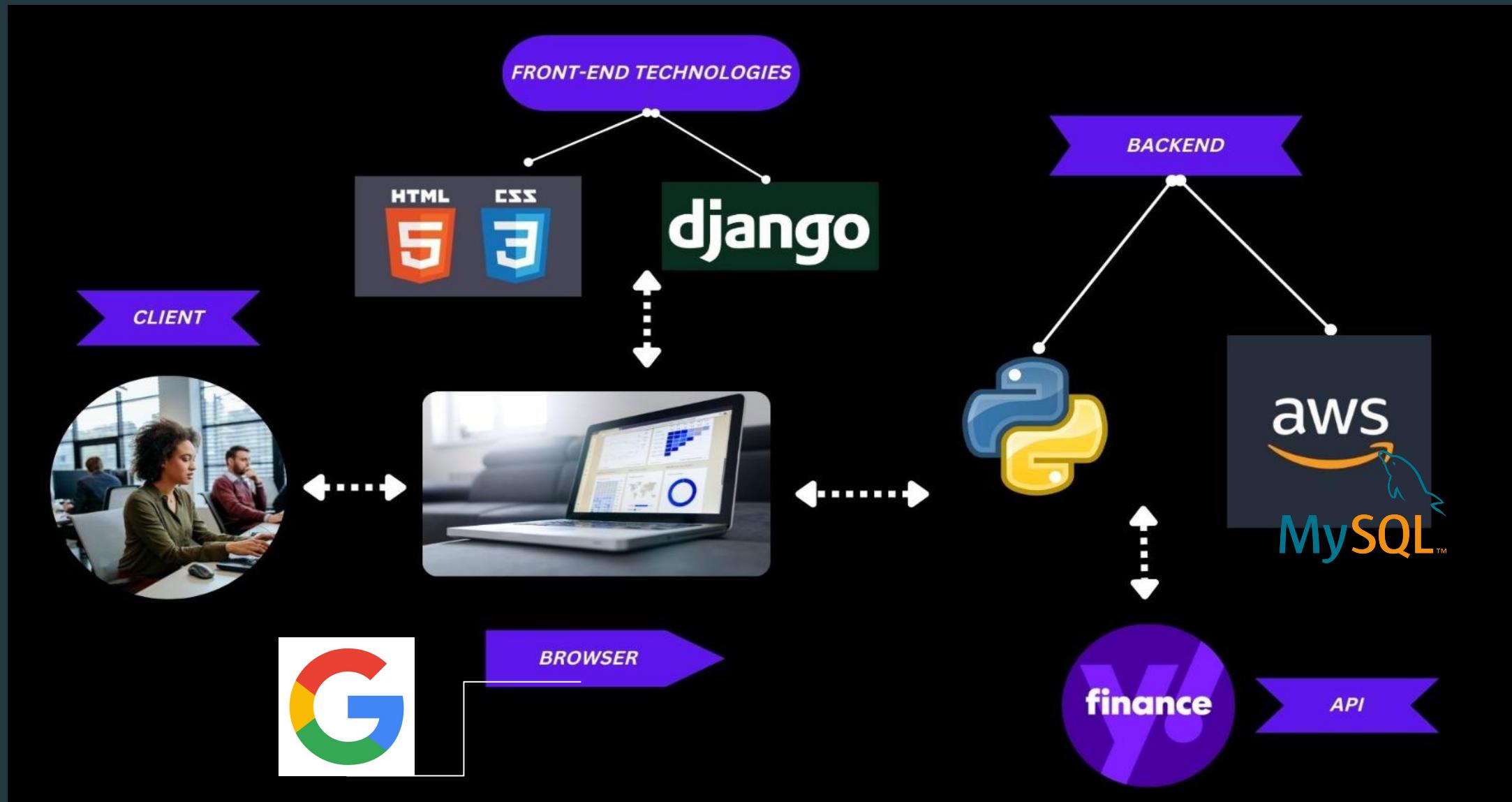


## AWS - Sprint 6

- MySQL is an open-source relational database management system. The "SQL" is the abbreviation for Structured Query Language.

We needed this for our database to capture login and password logs

# ARCHITECTURE



# SPRINT 5 RECAP

- In Sprint 5, we updated personas based on feedback from professors.
- We reviewed and updated the front end of our website's spring'22 UI as needed.
- project plan updated for fall of 22
- Our team velocity for Sprint 5 was 69.8%

# SPRINT 5 RECAP

Sprint	JIRA #	Description	Priority	Points	Status	Goal date	MileStone
Sprint 5	SRIW-1	Need to purchase a website domain	Low Priority	1	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-92	Update user personas to reflect	Medium Priority	3	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	5	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-78	Select Cloud platform to host user	High Priority	5	Complete	9/11/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-80	Review Spring'22 UI design for front end and make modifications where	Medium Priority	3	Complete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-79	Create new UI to factor in login, password	Medium Priority	3	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-96	Implement AWS + MySQL DB for login/password	High Priority	5	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-84	Installation Manual	High Priority	5	Incomplete	9/18/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-87	Peer Review 5	High Priority	5	Complete	9/25/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-88	Deliverable 5: Present MVP - Live Demo	High Priority	5	Complete	9/25/2022	Deliverable 5 - Presentation Deck
Sprint 5	SRIW-90	Revise presentation slides from Deliverable 5	Medium Priority	3	Complete	9/25/2022	Deliverable 5 - Presentation Deck

# SPRINT 5 VS SPRINT 6

## SPRINT 5

- Improved front end UI with CSS/HTML (Continuous)
- Researched backend for implementing new feature that requires RDS (i.e., AWS)
- Implemented data metrics in dynamic visualization tools (Graphs)

## 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.

# SPRINT 6

Sprint	JIRA #	Description	Priority	Points	Status	Goal date	MileStone
Sprint 6	SRIW-79	Create new UI to factor in login, password reset and settings	Medium Priority	3	Complete	10/2/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-74	Installation Manual	High Priority	5	Complete	10/2/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-97	Implement MySQL DB for login/password with SQL Lite	High Priority	5	Complete	10/2/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-90	Revise presentation slides from Deliverable 5	Medium Priority	3	Complete	10/2/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-98	Implement script for 'Invest' button to fetch respective company stock page on Fedelity website	High Priority	5	Complete	10/9/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-99	Peer Review 6	High Priority	5	Complete	10/9/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-73	User Manual	High Priority	5	Complete	10/9/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-74	Installation Manual	Medium Priority	3	Complete	10/16/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-75	Update Github Wiki	High Priority	5	Complete	10/16/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-100	QA - Push changes for previous bugs	High Priority	5	Complete	10/16/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-101	Review and update Product Roadmap for Fall'22 based on current Sprint completions and team vote	High Priority	5	Complete	10/23/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-102	Implement AWS cloud for login/password	High Priority	5	Incomplete	10/23/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-69	Make change to technical Paper	Medium Priority	3	Complete	10/23/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-70	Update user personas to reflect professor notes	High Priority	5	Complete	10/23/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-103	Deliverable 6: Present MVP - Live Demo	High Priority	5	Complete	10/30/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-104	Move site from local path to live website domain on web	Low Priority	1	Incomplete	10/30/2022	Deliverable 6 - Presentation Deck
Sprint 6	SRIW-105	QA - New Build	High Priority	5	Complete	10/30/2022	Deliverable 6 - Presentation Deck

# IMPROVEMENTS MADE FROM PROFESSOR FEEDBACK

- Percentages for committed vs completed matrix.
  - *Updated the graph with the percentages*
- Problem statement was missing
  - *Added a problem statement*
- Slide titles should be updated in accordance with the checklist requirements.
  - *Updated according to the checklist*
- Velocity is for current sprint stories And combined is the average velocity for the product
  - *Updated the formula for calculating the velocity*
- For user story and criteria need to made with the formate professor suggested.
  - *Updated accordingly*
- Improvements on retrospective adding votes
  - *Updated the retrospectives formate and added vote metrix*
- Screenshots for user stories from Jira shouldn't be added.
  - *No screenshots of jira have been added.*

# PRODUCT BACKLOG

Type	JIRA #	Description	Priority	Points	Status	Sprint
API	SRIW-15	Add Google articles API	High Priority	5	Progress..	Sprint 6
Feature	SRIW-106	Link button for 'invest now' to 3rd party brokerage website	High Priority	5	Completed	Sprint 6
Feature	SRIW-107	Create user Login and password and settings page UI/UX and workflow	High Priority	5	Completed	Sprint 6
Backend	SRIW-108	Implement RDS, Lambda and AWS dev environment to support creating user login/passwords	High Priority	5	Progress..	Sprint 7
Feature	SRIW-109	Allow user to compare two companies financial position	High Priority	5	Progress..	Sprint 7
Backend	SRIW-110	Implement Artificial Intelligence & ML algo	Low Priority	1	Progress..	Sprint 7
Feature	SRIW-111	Implement new metrics for searched company's financial position	Medium Priority	3	Progress..	Sprint 7

# SPRINT BACKLOG

SPRINT	JIRA #	DESCRIPTION	PRIORITY	STATUS	EXPECTED COMPLETION
SPRINT 6	SRIW-102	IMPLEMENT AWS FOR LOGIN/ PASSWORD	HIGH PRIORITY	INCOMPLETE	SPRINT 7
SPRINT 6	SRIW-104	MOVE SITE FROM LOCAL MACHINE TO LIVE DOMAIN ON WEB	LOW PRIORITY	INCOMPLETE	SPRINT 7

What went wrong ??

- It is a lengthy process to set up an AWS account and going through the documentation for cloud deployment.
- Running the code on a local machine allows the developer flexibility while the website is still being developed.

## **USER STORY & ACCEPTANCE CRITERIA**

### **User Story:**

**As a social investor, I'd like to be informed of the ESG score of the firm I'm investing in before buying any stocks.**

### **Acceptance criteria:**

**Given that the investor is already on the page, he or she will enter the name of the company in the search box and click the submit button, which will then display the company's ESG score.**

## **USER STORY & ACCEPTANCE CRITERIA**

### **User Story:**

**In order to provide my clients with beneficial returns, as an investment advisor, I want to be able to view historical data for the company.**

### **Acceptance criteria:**

**Given that the user is already on the page, he or she will type the firm name into the search field, which will display the company's historical trend over the last x months.**

# **USER STORY & ACCEPTANCE CRITERIA**

## **User Story:**

**I want to be able to invest in socially conscious companies as a young, inexperienced investor, and I want to learn as much as I can about the particular firm before I buy any of its stocks.**

## **Acceptance criteria:**

**Given that the user is already on the website, he or she will type the firm name into the search bar and click Submit. After reading historical data and ESG score, the user can scroll to the bottom of the page and click Invest, which will take them to a third-party payment channel once they are pleased.**

# SPRINT 6:

## TEST CASES

TEST CASE ID	SCENARIO	TEST CASES	EXPECTED RESULT	PASS/FAIL	TEST DATA
SRIW-98	Invest in this company	User wants to invest in a particular company then SRI website will redirect user to the third party website	A third party website should open in new window	Pass	Invest in this company will redirect user to a third party website for investment
SRIW-61	Graph	User can enter company name in search bar	Graph should be displayed above the chart	Pass	User can see graph of stock price
SRIW-79	GO	User can click on GO for login and signup	A pop-up should open for login and sign up	Pass	User can see login and signup pop
SRIW-79	Login	User can click on login button	A login page should popup	Pass	User can enter the details to login
SRIW-79	Signup	User can click on signup button	A signup page should popup	Pass	User can enter the details to signup
SRIW-79	Enter console	User can click on enter console button	User should be redirected to previous page	Pass	User can see the previous page
SRIW-79	Login with google	user click on google authentication link	User should be able to login with google	Pass	user can login with google
SRIW-97	database	Implement MySql for login/password	Credentials of should be stored in DB	Pass	credentials of user are stored in DB

# METRICS

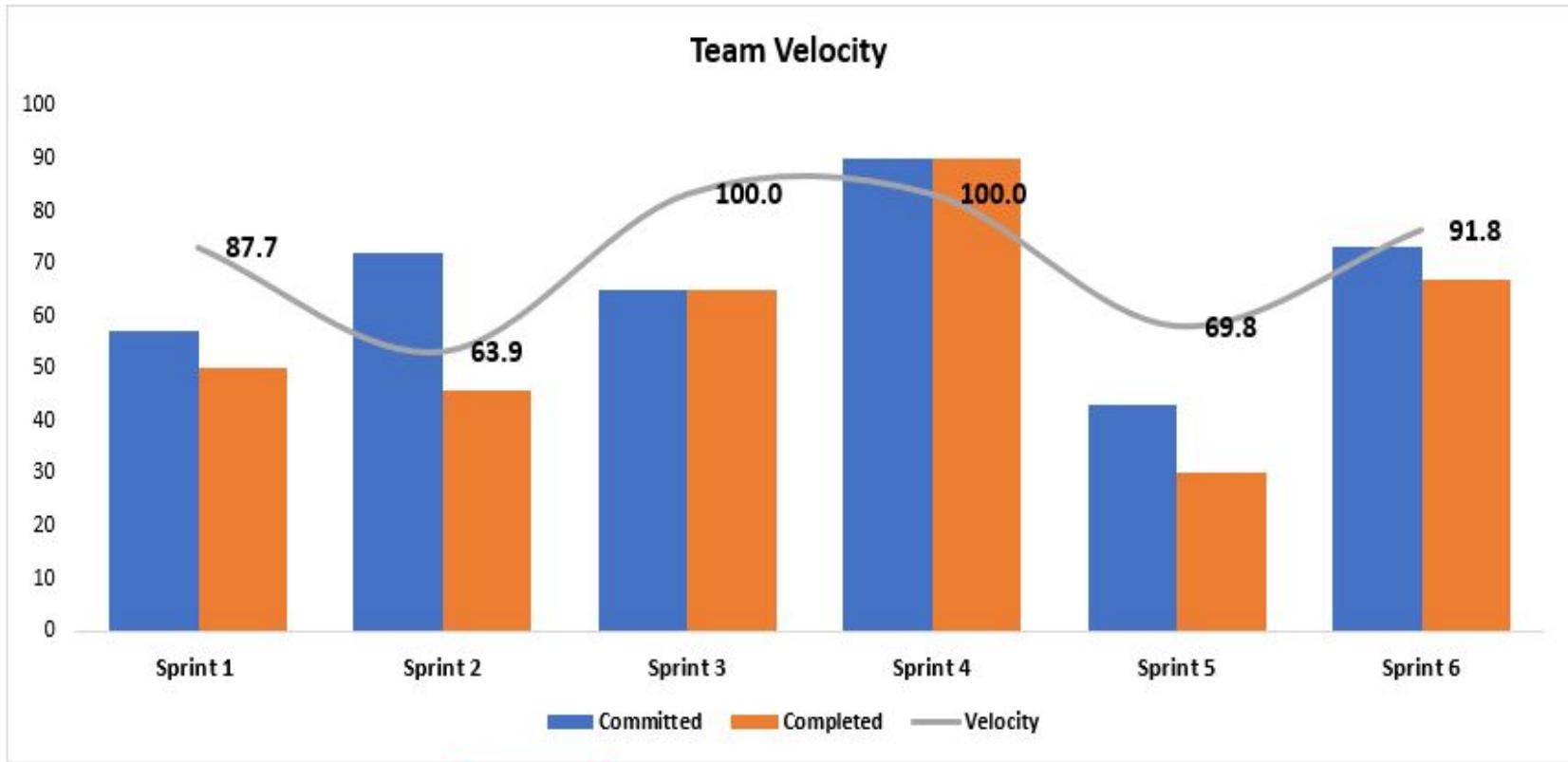
TEAM VELOCITY

BURNDOWN CHARTS

COMMITTED/ COMPLETED RATIO

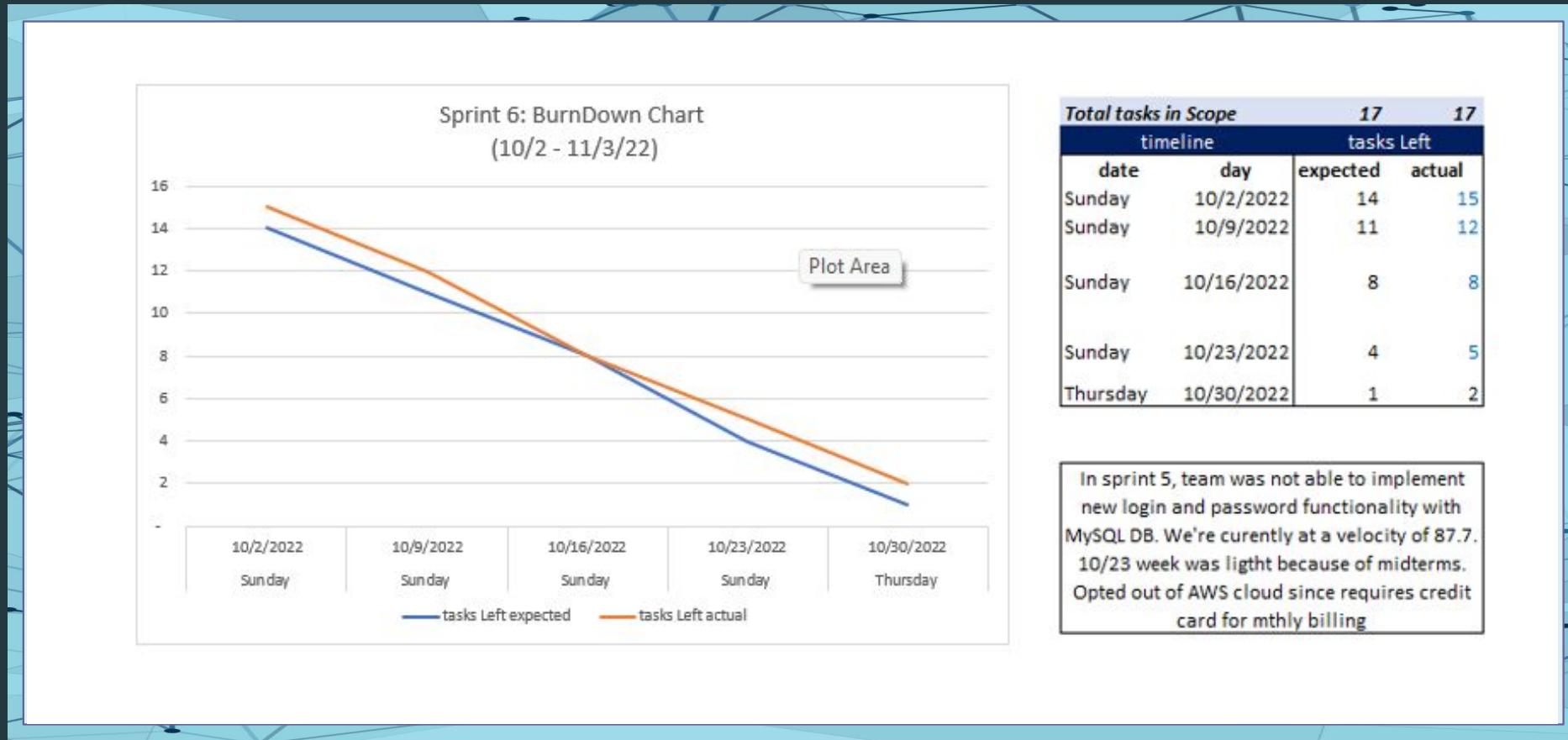


# SPRINT 6: TEAM VELOCITY



Sprints	Committed	Completed	Velocity
Sprint 1	57	50	87.7
Sprint 2	72	46	63.9
Sprint 3	65	65	100.0
Sprint 4	90	90	100.0
Sprint 5	43	30	69.8
Sprint 6	73	67	91.8

# SPRINT 6: BURNDOWN CHART



## SPRINT 6:

### COMMITTED/ COMPLETED RATIO

Sprints	Committed	Completed	Ratio
Sprint 1	57	50	87.7
Sprint 2	72	46	63.9
Sprint 3	65	65	100.0
Sprint 4	90	90	100.0
Sprint 5	43	30	69.8
Sprint 6	73	67	91.8

# **RETROSPECTIVES**

WHAT WENT WELL	WHAT NEEDS IMPROVEMENT	NEXT STEPS	Votes (OUT of 6)
<ul style="list-style-type: none"> <li>-Participation in great strength at all sprint meetings and team meetings</li> </ul>	<ul style="list-style-type: none"> <li>- More Team interaction and find a common time</li> </ul>	<ul style="list-style-type: none"> <li>-Started sharing the calendar, which assisted in scheduling meetings for discussion</li> </ul>	6
<ul style="list-style-type: none"> <li>-Team committed to a fixed plan and completed all tasks on time.</li> </ul>	<ul style="list-style-type: none"> <li>- It is essential to increase the work's accuracy.</li> </ul>	<ul style="list-style-type: none"> <li>-Create meetings with team members to improve the accuracy</li> </ul>	5
<ul style="list-style-type: none"> <li>- Implementation of the Login page was successful</li> </ul>	<ul style="list-style-type: none"> <li>- Approximate allocated time for each task that needs improvement</li> </ul>	<ul style="list-style-type: none"> <li>-Revise the task which needs to be performed can it be a group task or individual</li> </ul>	6

## **SPRINT 7 future work**

- Application Logo has to be designed and website has to be deployed on AWS
- User interface of application has to be further improved
- creating Google articles for the company that is looked for using our software
- Integrate google article API to add articles on the page

# **PROJECT DEMO**

# GITHUB LINK

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

---



# **THANK YOU!**