



Instructor:
Professor Henry Wong

DOSRI

AMPLIFYING SOCIALLY RESPONSIBLE INVESTING (SRI)

PRESENTATION 7

Team 1: Six Underground

Presented by:

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Team Members



Jephthe
Louis-Jacques

Scrum Master



Harshal
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Developer



Samarth
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QA Analyst



Kush
Shah

Developer



Farhan Pasha
Mohammed

Cloud Engineer



Naga Sai Kiran
Nimmakayala

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.

- “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

PROJECT DESCRIPTION

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.



MINIMAL VIABLE PRODUCT (MVP)

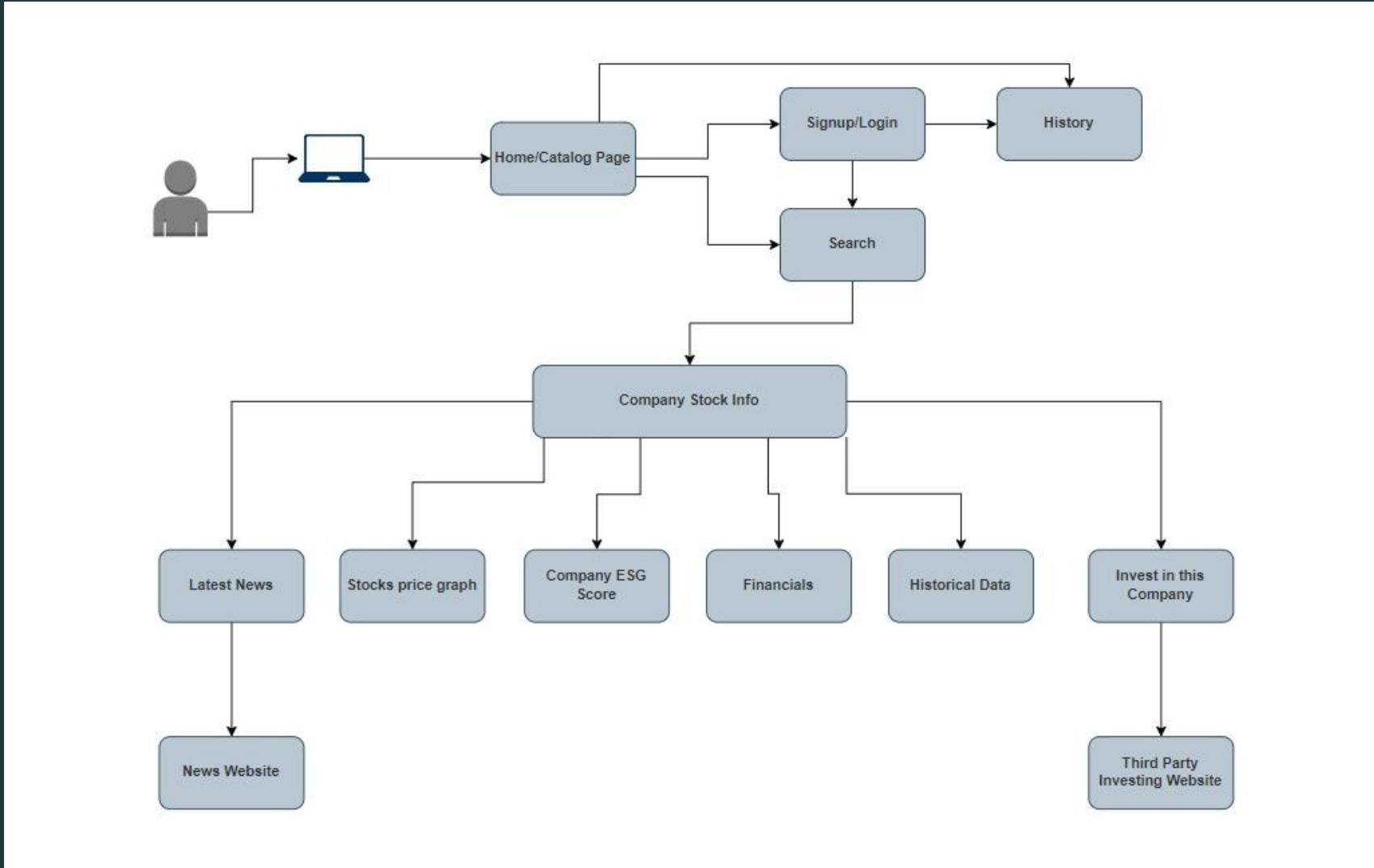
Features:

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

TECHNOLOGIES



ARCHITECTURE



SPRINT 6 RECAP

- 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 VS SPRINT 7

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 7

- Improved user interface for login and sign-up page
- Added search history tab for registered user
- Implemented news headlines section for user to know more about current scenarios of company

IMPROVEMENTS MADE FROM PROFESSOR FEEDBACK

- Architecture needs improvement.
 - *Updated Architecture diagram of DOSRI website*
- Sprint backlog needs improvement based on user stories as well.
 - *Updated sprint backlog which correlates with user stories*
- Product backlog needs to show tasks only.
 - *Updated product backlog accordingly.*
- Need to add an API screenshot and the Webpages SS.
 - *Added backend screenshots which shows API calls and requested data*
- Needs traceability in all the sprints test cases
 - *updated test cases accordingly.*
- Sprint's future work needs to be in user story format.
 - *No screenshots of jira have been added.*

PRODUCT BACKLOG

JIRA #	Description	Priority	Points	Status	Sprint
SRIW-112	As a new investor, Donna want to create a whislist for the stocks shes is willing to invest in.	Medium Priority	3	TO DO	Sprint 8
SRIW-108	Overall improvements to User interface for login/sign up page and website with CSS/HTML	High Priority	5	Complete	Sprint 7
SRIW-109	As an long term investor, Carlos wants to save his search history for future reference once logged-in	High Priority	5	Complete	Sprint 7
SRIW-115	As a new investor, Donna wants to search Google articles for related news based on her current company stock interest	High Priority	5	Complete	Sprint 7
SRIW-110	As a bank investment advisor, Paul wants to see the latest dates of stock price fluctuation in the data table	High Priority	5	Complete	Sprint 7
SRIW-111	Revise DB data schema	Medium Priority	3	Complete	Sprint 7
SRIW-113	As a long term investor doing research, Carlos wants to filter for only data in the date range he's specified	High Priority	5	TO DO	Sprint 8
SRIW-114	As a end user I want to share my SRI investment portfolio wishlist with another user	Medium Priority	4	TO DO	Sprint 8

Sprint 7

Sprint ▾	JIRA # ▾	Description ▾	Priority ▾	Points ▾	Status ▾	Goal date ▾
Sprint 7	SRIW-108	Overall improvements to User interface for login/sign up page and website with CSS/HTML	High Priority	5	Complete	11/3/2022
Sprint 7	SRIW-109	As an long term investor, Carlos wants to refer his search history for future reference once logged-in	High Priority	5	Complete	11/10/2022
Sprint 7	SRIW-110	As a new investor, Donna wants to learn more about related news based on her current company stock interest	High Priority	5	Complete	11/10/2022
Sprint 7	SRIW-111	As a bank investment advisor, Paul wants to see the latest dates of stock price fluctuation in the data table	High Priority	5	Complete	11/7/2022
Sprint 7	SRIW-115	Revise DB data schema	Medium Priority	3	Complete	11/24/2022
Sprint 7	SRIW-116	Update technical paper	Low Priority	1	Complete	11/26/2022
Sprint 7	SRIW-117	Update installation manual	Low Priority	1	Complete	11/26/2022
Sprint 7	SRIW-118	Test cases for Sprint 7	High Priority	5	Complete	11/26/2022

USER STORY & ACCEPTANCE CRITERIA

SRIW 109

User Story:

As a Investor, I'd like to keep a track on search history of the company stocks i previously searched

Acceptance criteria:

Given that the investor is already on the page, he or she ones logged in they can they see the search history in the history tab on the Console/Home page

USER STORY & ACCEPTANCE CRITERIA

SRIW 111

User Story:

In order to provide my clients with beneficial returns, as an investment advisor, I should be aware about the latest date of the historical data on the site.

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 in the historical data tab which will also show them the latest date for the updated data.

USER STORY & ACCEPTANCE CRITERIA

SRIW 110

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 submitting the companies name they can then see the recent headline article for the company they have searched.

SPRINT 7: TEST CASES

User story ID	TEST CASE ID	TEST CASES	EXPECTED RESULT	PASS/FAIL	TEST DATA
SRIW-109	SRIW-119	Reference previously searched company names	User should be able see all his search history	Pass	Once user on history page they can see the company they previously searched
SRIW-110	SRIW-120	Learn about latest news for the company searched	User should be able to see news headlines	Pass	Once user searches for the company's stock they can see the latest headlines for the searched company
SRIW-110	SRIW-121	Learn about latest news of the company searched	User will be redirected to news article	Pass	Once user clicks on the headlines below the search box they can see the latest article
SRIW-111	SRIW-122	Latest calendar date for the historical data available	User can now see the most recent calendar date for the historical data	Pass	Once user goes to historical data they can see the late date for when the data was updated

Stories Completed

User Story ID	As A	I Want To	So That	Acceptance Criteria
SRIW 109	Long-term Investor	Keep track of search history	I can refer back to companies i searched before	Given that the investor is already on the page, he or she ones logged in they can see the search history in the history tab on the Console/Home page
SRIW-110	Inexperienced investor	Learn about latest online news of the company	I can see latest news headlines	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 submitting the companies name they can then see the recent headline article for the company they have searched.
SRIW-110	Investment Advisor	Learn about latest online news of the company	User will be redirected to news article	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 in the historical data tab which will also show them the latest date for the updated data.

METRICS

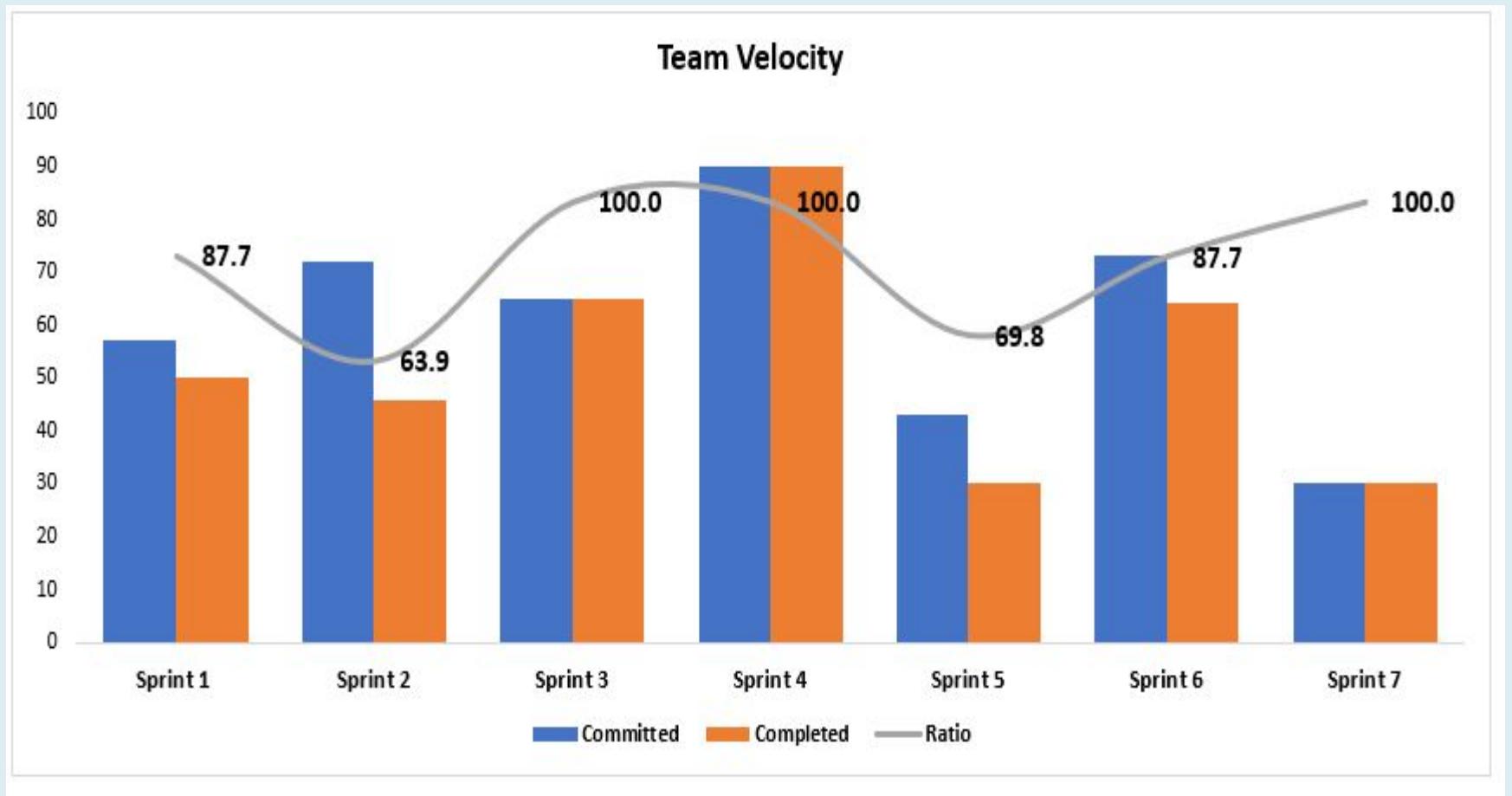
TEAM VELOCITY

BURNDOWN CHARTS

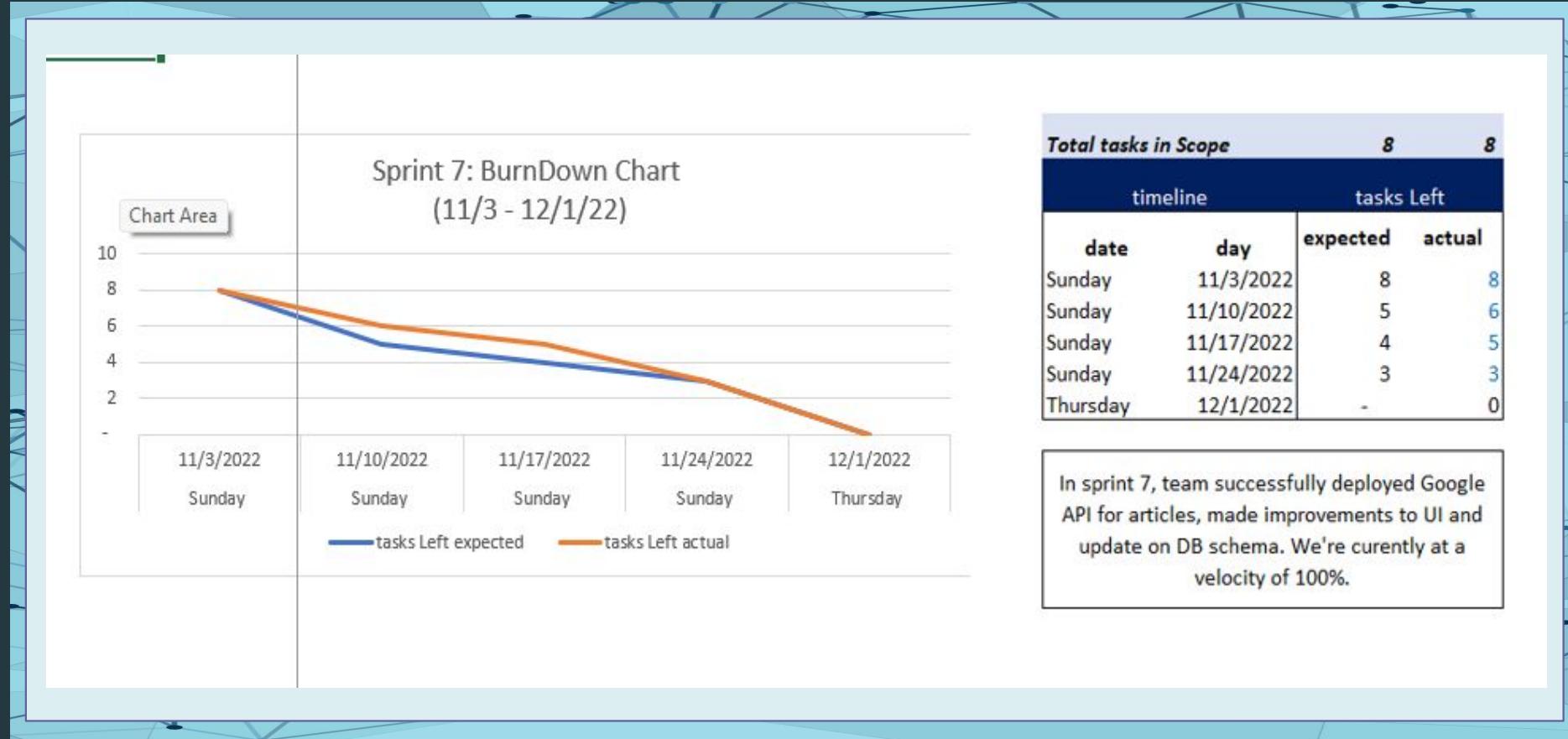
COMMITTED/ COMPLETED RATIO



SPRINT 7: TEAM VELOCITY



SPRINT 7: BURNDOWN CHART



SPRINT 7:

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	64	87.7
Sprint 7	30	30	100.0

RETROSPECTIVES

WHAT WENT WELL	WHAT NEEDS IMPROVEMENT	NEXT STEPS	Votes (OUT of 6)
<ul style="list-style-type: none"> -Participation amongst the team has continued to improve, everyone knows each other's strengths 	<ul style="list-style-type: none"> - Using maybe a messaging tool like Slack to raise questions instead of waiting when we meet or e-mailing 	<ul style="list-style-type: none"> -Migrating conversations from email to possibly a chat Project Management tool like Slack 	6
<ul style="list-style-type: none"> -Team aligning on what is appropriate for MVP as of end of semester vs long term Product roadmap 	<ul style="list-style-type: none"> - We need to find a better way to collaborate for backend work for AWS 	<ul style="list-style-type: none"> -Review individual tutorials for AWS Cloud training and meeting with team to share insights 	6
<ul style="list-style-type: none"> - Continuous completion of tasks within the required timeline and identifying dependencies 	<ul style="list-style-type: none"> - Getting team members to understand each others code faster for quicker completion of stories & tasks 	<ul style="list-style-type: none"> - Setting up one separate meeting strictly for walking team through individual code 	6

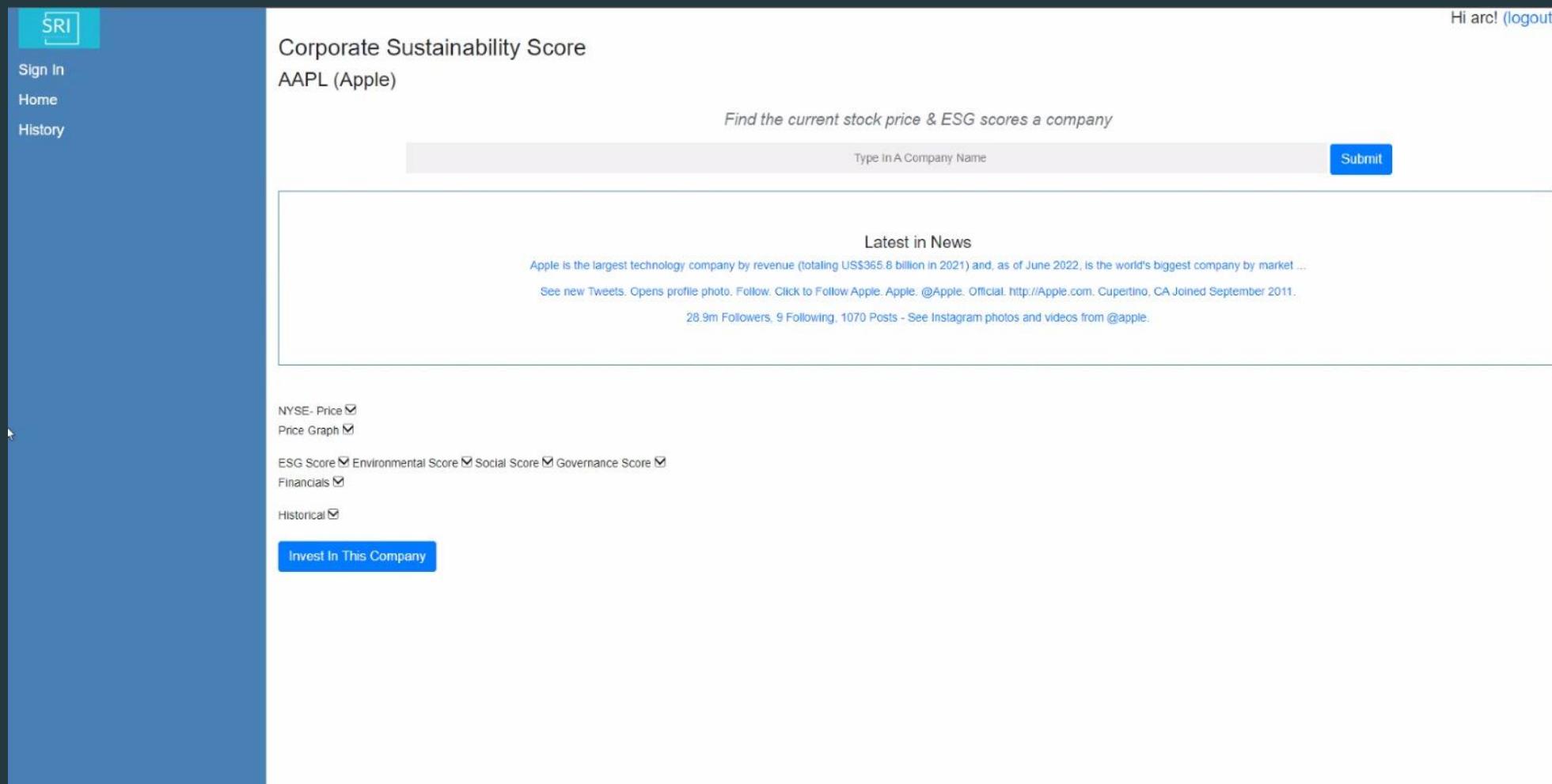
SPRINT 8 FUTURE WORK

ID	Description	Priority	Points	Status	Sprint
SRIW 112	As a new investor, Donna want to create a wishlist for the stocks shes is willing to invest in.	Medium	3	TO DO	Sprint 8
SRIW-113	As a long term investor doing research, Carlos wants to filter for only data in the date range he's specifies	High	5	TO DO	Sprint 8
SRIW-114	As a end user I want to share my SRI investment portfolio wishlist with another user	Medium	3	TO DO	Sprint 8



PROJECT DEMO

SCREENSHOTS OF THE WEBSITE



The screenshot shows a web application interface for corporate sustainability analysis. The top navigation bar includes a logo labeled "SRI", "Sign In", "Home", and "History". On the right, there is a user greeting "Hi arc! (logout)". The main title is "Corporate Sustainability Score" followed by "AAPL (Apple)". Below the title is a subtitle "Find the current stock price & ESG scores a company". A search bar contains the placeholder "Type In A Company Name" with a "Submit" button next to it. A large central box displays "Latest in News" with a summary about Apple's market position. Below this box are several filter checkboxes: "NYSE- Price" (unchecked), "Price Graph" (unchecked), "ESG Score" (unchecked), "Environmental Score" (unchecked), "Social Score" (unchecked), "Governance Score" (unchecked), "Financials" (unchecked), and "Historical" (unchecked). At the bottom of this section is a blue button labeled "Invest In This Company".

Corporate Sustainability Score
AAPL (Apple)

Find the current stock price & ESG scores a company

Type In A Company Name

Latest in News

Apple is the largest technology company by revenue (totaling US\$365.8 billion in 2021) and, as of June 2022, is the world's biggest company by market ...
See new Tweets. Opens profile photo. Follow. Click to Follow Apple. Apple. @Apple. Official. http://Apple.com. Cupertino, CA Joined September 2011.
28.9m Followers, 9 Following, 1070 Posts - See Instagram photos and videos from @apple.

NYSE- Price
Price Graph

ESG Score Environmental Score Social Score Governance Score
Financials

Historical

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Analyze your favorite stocks

[Enter console](#)

[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

```
[30/Nov/2022 19:15:45] "GET /catalog/ HTTP/1.1" 200 10817
https://serpapi.com/search
[30/Nov/2022 19:15:58] "GET /catalog/ticker/?ticker-value=Apple HTTP/1.1" 200 3749288
[30/Nov/2022 19:15:59] "POST /catalog/create/ HTTP/1.1" 302 0
[30/Nov/2022 19:15:59] "GET / HTTP/1.1" 200 1648
|
```

GITHUB LINK

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



THANK YOU!