

Portfolio Sentinel

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In Summary...

Head Client: Matthew Garrett

Mentor: Drew Heiss



What is Portfolio Sentinel?

Portfolio Sentinel is a program that will provide the user with information on recent stock data through the use of a Generative Artificial Intelligence.

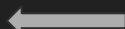
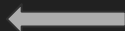
Feedback and Results of Use

Mentor:

- Starting simple: use stock symbols
 - Ex: AAPL, TSLA, MSFT
- Fetch calls for frontend and backend

Client:

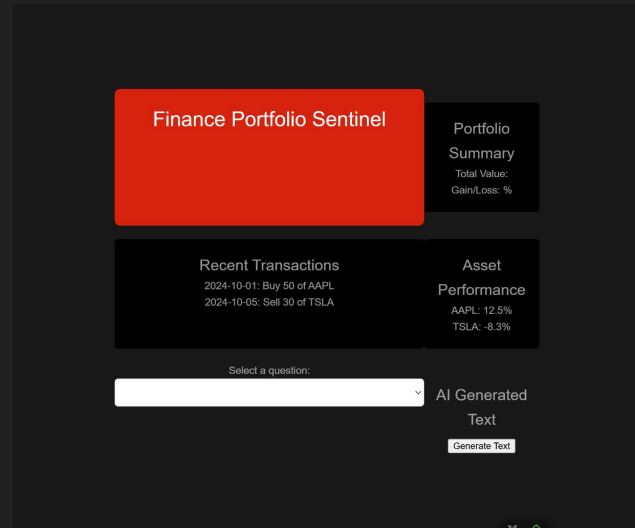
- Provided ideas for AI prompts
- Change in generative AI
- Ability to change the client's stocks: textbox submission
- More refined summaries



Results from use of our
1st Iteration

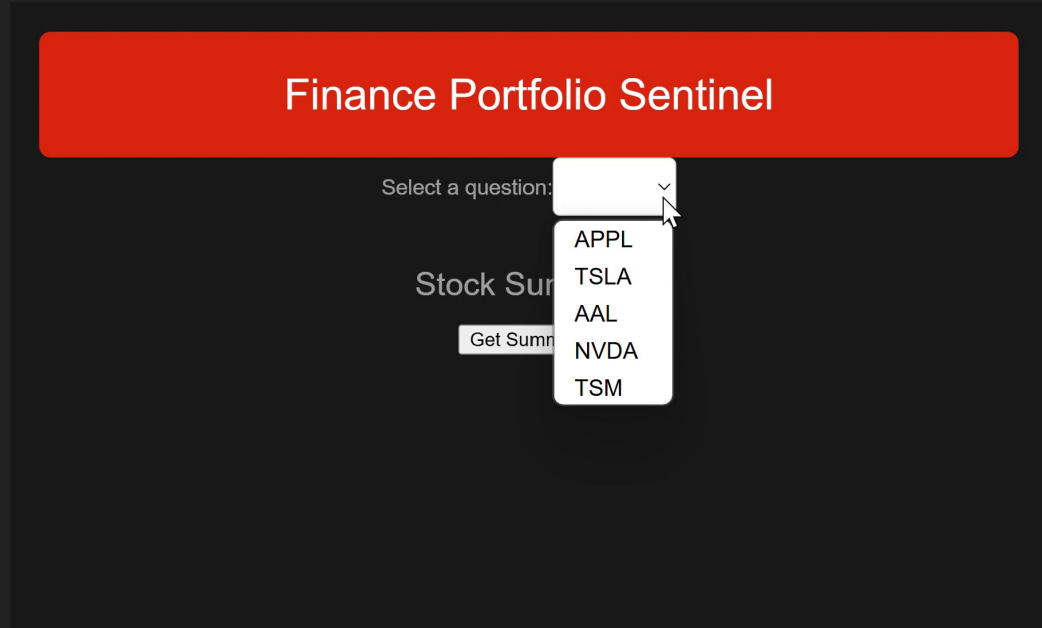
Iteration 1 Feature: User Interface

- Clear user-friendly interface
- Preface of data (not yet adjustable, mock feature)



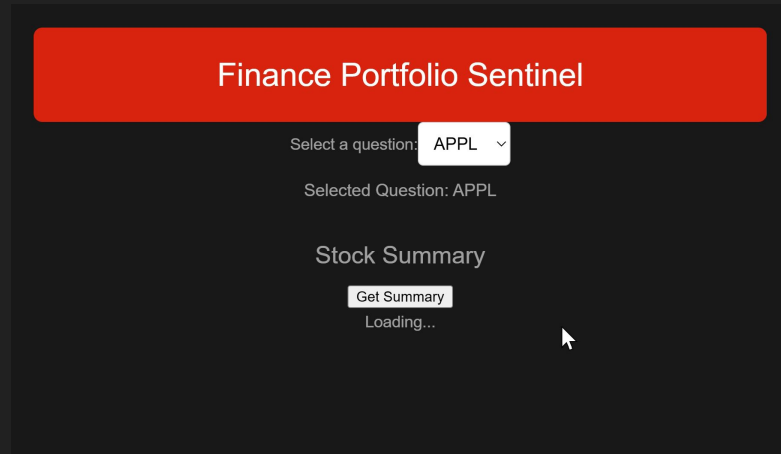
Iteration 1 Feature: Dropdown Menu

- Dropdown menu presents 5 base stocks that can each be chosen for a summary



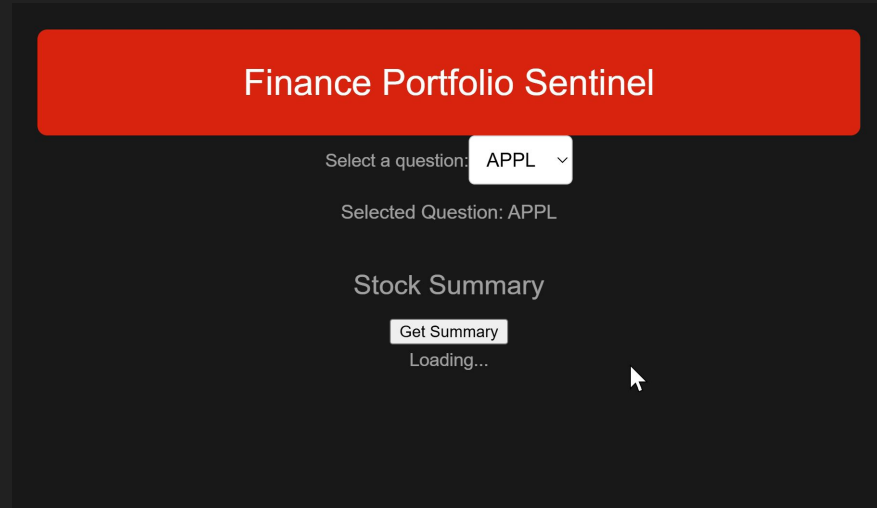
Iteration 1 Feature: Sample “Selected Question”

- Presents the selected stock symbol where the AI prompt will also soon be added
- It can also be noted that the UI presents “Loading” when waiting for the summary output



Iteration 1 Feature: Generative AI Summary

- The output of the summary of any chosen stock is presented on the screen (not currently pictured)



Iteration 2 Features

- Adding the textbox submission for new stocks
 - Will include error handling for stock symbols that cannot be found
- Adding a date range implementation for more specific searches
- Changing the AI prompts
- Implementation of docker tool

Retrospect

What does each team member think about this iteration?

What kind of properties of quality software did you sacrifice for the sake of functional software?

How do you plan to approach iteration 2?

Time to Grind: (We need to cook)



What we
want our
code to be

What you
think our
code is (I hope)

Portfolio
Sentinel
Team

The money we
aren't making

The experience
we are getting