Portfolio Sentinel

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In Summary…

Head Client: Matthew Garrett

Mentor: Jacob Deffendall

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 (Mentor)

Mentor: Jacob Deffendall

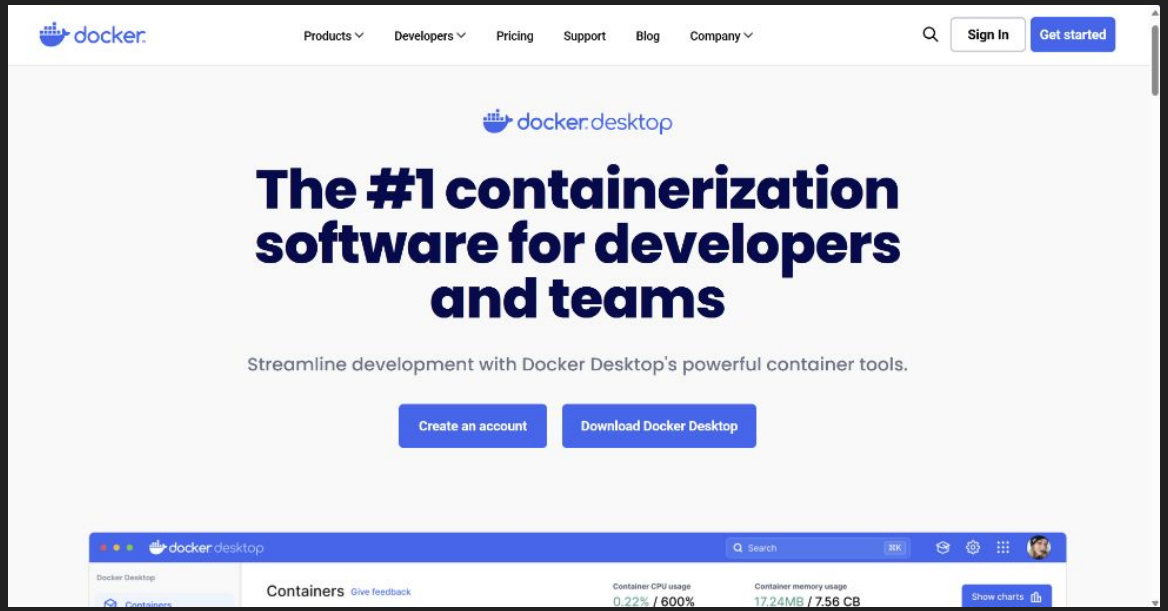
- He thought the software had a great look to it and that the question dropdown was a nice touch
- He also mentioned adding a mock portfolio, as we have also discussed amongst Ergin
- We should solve the visual issues with the buttons and menus
    - We should try using CSS tools

Feedback (Client)

Client: Matthew Garrett

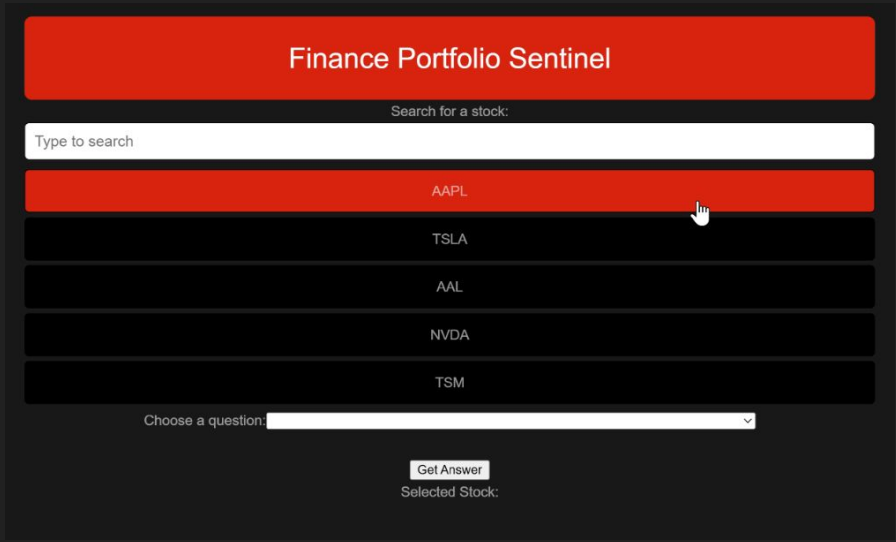
- He believes we've made good progress on the program and our new work with the prompts
- Believes the portfolios from Merit will be a good implementation for mock portfolios
- We need to make calls for the portfolios that advisors have built
    - Ability to add multiple stocks as an argument
- Would he use the program? "In its current state probably not. If we get to the place where we can make the calls for a portfolio the advisor has built, that will be the game changer."
    - What does this mean for us moving forward?

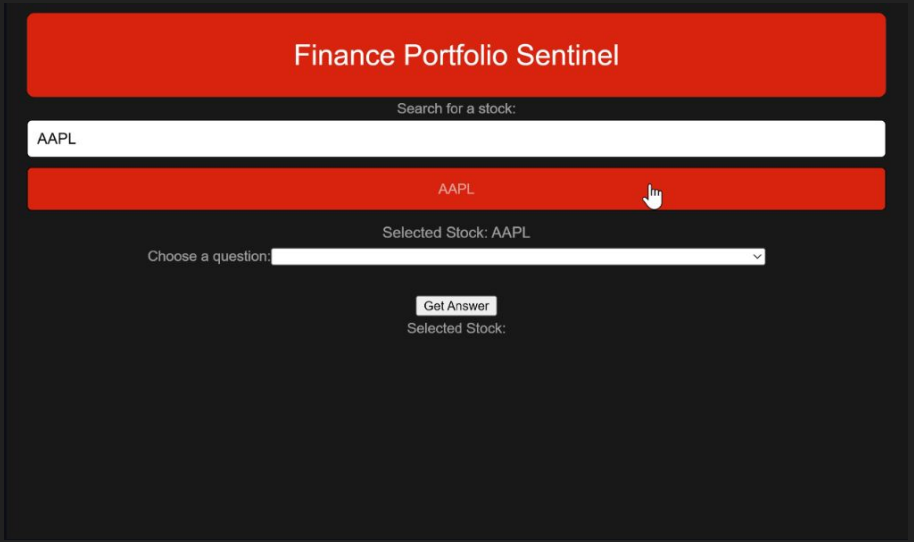
Iteration 2 Feature: Docker Implementation



- Implemented Docker to allow the user to build and run the program using `docker build` and `docker run`

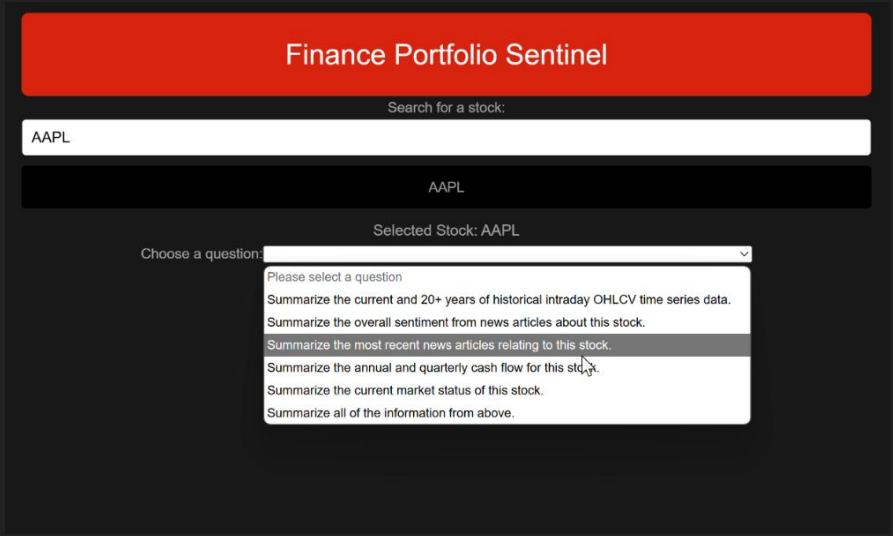
Iteration 2 Feature: New Search Bar

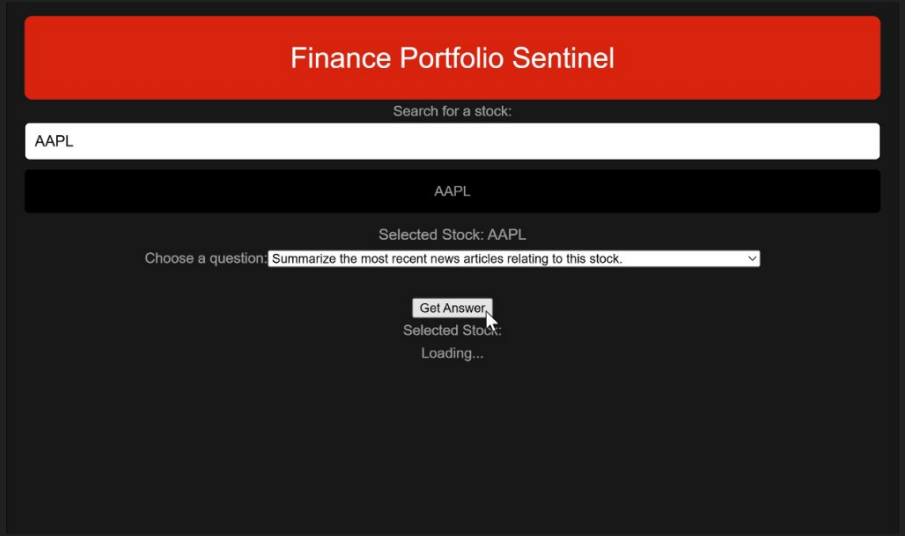




- Allows users to search and it auto fills with related stocks

Iteration 2 Feature: New Questions to Ask





- Allows users to select a specific question about a stock and provides a summary based on the question selected

Iteration 3 Features

- Adding a portfolio (as an argument)
    - Starting with a “mock portfolio”
- Searching multiple stocks at once
- Add date inputs for specific questions
    - Could have the hidden feature while relevant questions aren’t present

Retrospect

What does each team member think about this iteration?

What do you think about giving your software more quality by adding the other properties (modularity, testing, clean code etc.)?

How do you plan to approach iteration 3?

Time to Grind: (We didn’t listen)

HAAAAAAANK
HAAAAAAAAAAAANK

FORGET THE PROMPTS
CREATE A MOCK PORTFOLIO

HAAAAAAAANK

IT’LL MAKE YOUR PROGRAM USEFUL

HAAAAAAAAAAAAAAAAANK