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 program was looking amazing and that Matt would love our changes and updates
- Mentioned a way to analyze the portfolio as a whole and each stock individually
- Overall, he believes we are headed in the right direction

Feedback (Client)

Client: Matthew Garrett

Comments and Notes from Use:

- ChatGPT can't surf through information from specific APIs like our program
- Notes that ChatGPT can’t be as specific as our summaries are
- Wasn’t sure if “Add to Portfolio” and “Analyze Portfolio” buttons were clicked
- Large summaries could be formatted in some way

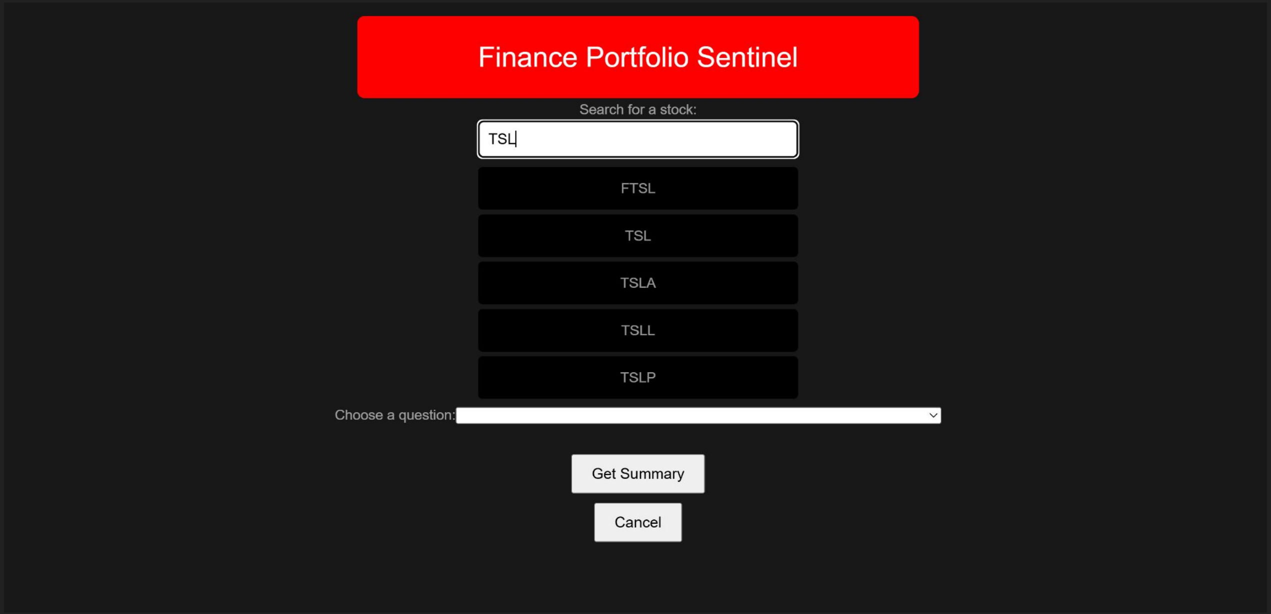
Suggestions:

- Adding a way to alert the user that an action is in progress
- UI changes
    - Make it easier to read
    - Data entry?
- Advisor comment section
- Method to erase portfolio and start over
- Mutual funds could be difficult to add but possible

Review: Business Requirement

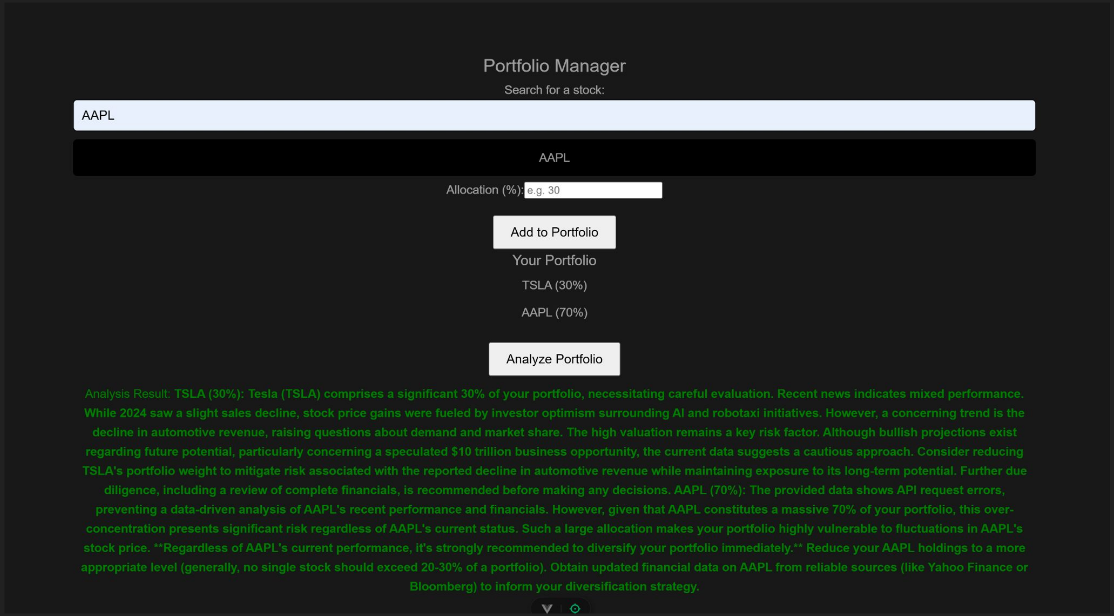
Analyzing investments to help Advisors find vulnerabilities and risks that can be presented to a client in a meaningful and insightful way.

Iteration 3 Feature: Search Bar Populated



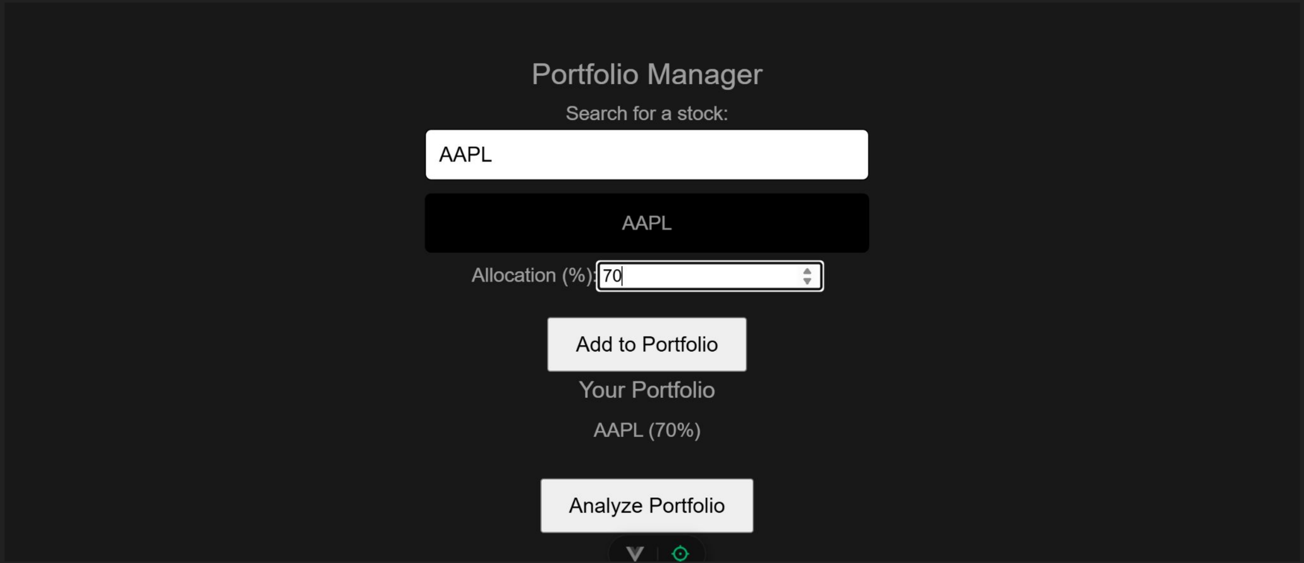
Previously users could only search up 5 stocks. Now the search bar is populated with a number of them

Iteration 3 Feature: Portfolio Manager



Portfolio Manager can create and analyze portfolios

Iteration 3 Feature: Allocation



Users can not only create their portfolios but specifically allocate them how they please

Future Iteration 4 Features

- Adding a method to delete or restart a portfolio (for advisor’s ease of use)
- UI changes for better readability
- UI changes for user comprehension
- Advisor comment or notes section
- (If possible) Mutual funds rather than only using stocks

Teamwork

Who worked where?

Antone - Search bar population, connecting csv file

Dennis - Allocation methods, cancel button, analysis prompt

Edgar - “Add to portfolio” backend, analysis prompt

Chandler - Portfolio Manager setup, “Add to portfolio” frontend

Mason - Tests, error handling

Time to Grind:

The joke is that Matt (our client) is just incredibly tall… I did not expect it