Investor Heaven Functionalities

Erick Delgado

January 21st 2023

Sign up

* Use same account
* Create account or login using google

Main Dashboard {Post Sign up}

* Top Banner
  + Recent searches appear when user clicks on bar
  + User can input any given Stock and have that information displayed in the main dashboard.
  + Top bar should remain at the top of page.
  + Profile Icon so the user can view account information
* Side Banner (left)
  + Dashboard button (home)
  + Finance PDF extract button
    - Pulls data out of nonstructured documents
  + [Postpone] Portfolio Manager button
* Main Components
  + Lifetime Stock History (manage by time)
  + Chat Displaying
    - Price to earnings ratio
    - Price to book ratio
    - Debt to equity ratio
    - Free cash flow
    - Price earning to growth ratio
  + Calculated public sentiment {marked Experimental}:
    - Below chart display a rating from 0-10 on how well the company has been performing with regards to media coverage. Potentially filtered by time 6months, year, lifetime.
  + Potential Forecasting
    - Chart placed to the right of current stock data projects stocks future based on calculated ratio and public sentiment.
  + Bottom Right:
    - Share how the website has been created
* PDF Extraction
  + Using the sec.com EDGAR database search for a publicly traded company’s quarterly earnings report and suggest 0-10 likelihood of investment. Display the data that was extracted and how it concluded to invest or not invest.
  + Upload a personal unstructured PDF to have data pulled from.
* Profile
  + Display users first name, last name, date of signup, and email address
  + Offer password change and account termination
* Portfolio Manager {postpone}
  + Users will be able to enter in their current portfolio position to track how well or poorly they have performed