**PHASE 1**

Deliverables 1

* *Build use case diagrams*
* *Build process flows to assist in understanding the project objectives*
* Begin building your business case document
* *Profile the data provided in excel*
* *Identify issues in the data that may need to be resolved as you move forward*
* *Build a data model that you feel could be used to represent the data provided*
* *Plan for Importing the data into oracle and implement it*

Deliverables - 2

*Develop a SQL solution/code-set of report-ready views based on the 3 scenarios from the database concepts section and the additional requirements provided above*

Deliverables - 3

Produce a series of functions and procedures to support dynamic reporting in later activities.

Files required:

1. ER\_Diagram.drawio
2. Use\_case.drawio
3. Process\_flow.drawio
4. All.sql
5. Queries.sql

**PHASE 2**

Getting to Know Your Data Through Data Analytics

Deliverables

* Customer segmentation
  + 5 Segments:
    - Asset obj 5, 3+ dependents
    - Married, 60-70 age
    - Female, 0-1 dependents
    - 30-40 age group
    - Florida state
* Risk Tolerance analysis

Files Required:

1. Folder - Customer\_Segmentation\_and\_Data\_Analytics\_ipynb

**PHASE 3**

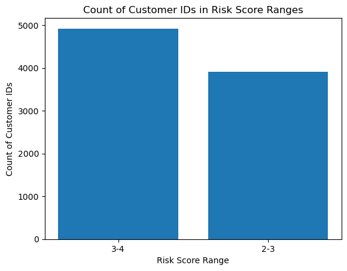
Data Exploration with Python

Deliverables

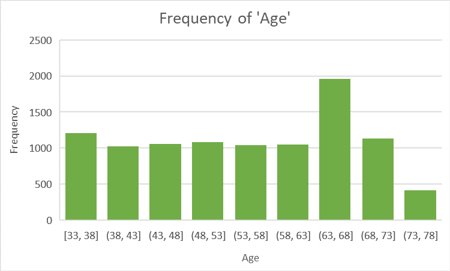
* You will be using your Python skills to access and extrapolate information from the provided data.
* Use the information gleaned to determine the most important aspects of your data to analyze and comment on.

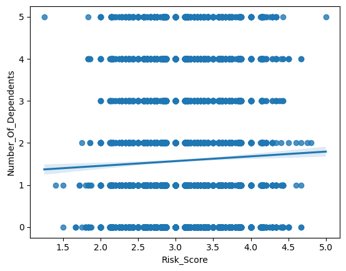
Screenshots of important plots found:

A graph of different colored bars

Description automatically generatedA graph of different colored bars

Description automatically generated

A graph with blue lines

Description automatically generatedA graph of different colored bars

Description automatically generated

**PHASE 4**

Statistical Programming

Deliverables

* A detailed description of the sentiment methodology your team has chosen to implement
* The development of your sentiment dictionary
* Development of your sentiment analysis model
* Implementation of your model in Python

Files Required:  
  
1. Sentiment\_Analysis\_v3.ipynb  
2. Sentiment\_Analysis\_v4\_stopwords.ipynb

**PHASE 5**

Data Visualization Part I

Deliverables -1

* Report requirement assessment for each scenario

Data Visualization and Reporting Part II

Deliverables - 2

* Develop interactive report/dashboards for the fund and for customer analysis.
* Produce a report that incorporates the findings of your analysis and a narrative to support them

Files Required:

1. Final\_ph5.pbix
2. Scenario\_report.txt

**PHASE 6**

Explore Data Through Web Services

Deliverables

* A Jupyter notebook that demonstrated pulling yahoo finance data from the existing API
* Utilization of the acquired data in visualizations within the notebook to perform exploration and analysis of the anew data
* Creation of a power bi report utilizing the new data to help customers perform due diligence on potential stocks to be included in the portfolio

Files Required:

1. Sentiment\_Analysis\_SP\_v1\_phase\_6.ipynb
2. Case\_Study\_Phase\_6\_AAPL\_v1.ipynb
3. ph6\_v2.pbix

**PHASE 7**

Data Integration

Deliverables

* Create an ETL Project using Talend to handle data flows and transformations.

Files Required:

1. Zip file of Project in Talend
2. Required .csv files for input files.

**PHASE 8**

Data Deployment in the Cloud

Deliverables

* Collect, transform and deploy your data to the MongoDB Atlas cloud as appropriate.

Account details on Mongodb Atlas

* leap.in23.team5@careeratg.com
* W3@lthWiz

Steps involved in Data Deployment:

1. Create an account in MongoDBAtlas
2. Go to Databases, and create a new database.
3. Give the asked username and password for your cluster thus created.
4. Use the Connection URL for the cluster in MongoDBCompass to connect.
5. Use the json exported in Talend, and upload the same in MongoDB.

Connection URL for MongoDBCompass:

* mongodb+srv://leapin23team5:W3%40lthWiz@cluster0.q25kgf3.mongodb.net/

OTHER CREDENTIALS

Github repo details:

* Username: Fidelityteam5
* Password: [Password@team5](mailto:Password@team5)
* Repo Name: FidelityLeap2023\_CaseStudy\_Team5\_DE