Appendix A: Evidence of consultation

(Only key parts are recorded)

Time, place, background of previous discussion (our relatioships)

Me: What should this module consist of?

Jerry: Since my primary concern with my quantitative analysis is stock data, I’d say collecting data is the most important thing I want. Some calculations would also help a lot. And since I also have some quantitative analysis codes in Python, it will be nice to have some functions that can help me operate these data.

Me: You mentioned operating data, what do you expect from this? I mean what functionalities you want?

Jerry: On the top of my mind, operations can include opening financial report sheets, collecting factors from database, and probably a translate functionality because that will save my time looking companies up on Google. Oh, and preferably a saving function that saves the result of calculations to my computer.

Me: From your description I think I will write a Python module for you. Do you have any difficulty with that?

Jerry: Not at all! I started using Python years ago, and I think it will be easy for me. Just make sure your syntax are easy to use, and probably gives some interactive feedbacks when I call these functions (in your module).

Me: For data collection, do you want the module to download all data at once or requesting for data from internet whenever you needed?

Jerry: I think both are fine. Preferably downloading all data at once, because WIFI in my home is not very good and, with this, I can download data at school and use the module in my home.

Me: Sure. I think I will use MySQL for database. It’s a very efficient database.

Jerry: Hold on to that thought. I did try to learn MySQL but I got confused when I tried to set it up to my computer. So the ground rule is, please don’t introduce lots of setup works for me. Unless you can make it setup free, probably don’t use it.

Me: Okay I get it. I will figure it out.

Me: So you said you want lots of stock data. Do you mean stocks from Chinese stock market or US stock market?

Jerry: Oh it’s neither. I will give you a list of stocks I want, generally from US stock market. You just need to collect data from these stocks. I’d say you’d better not collecting other stocks because that will probably make the program slower, and I probably won’t use it very often anyway.

Jerry: And don’t forget, data need to be updated automatically. Last year we suffered from out-of-date data, so please add a function to update data for us.

Me: You mentioned you want some calculations. What are these like?

Jerry: Well I mean calculations include some rankings and quantitative index. And some factors are quite important but usually not on stock financial reports on the internet, so that’s also a part of calculations. I will give you a list of index and factors that I really want in my quantitative analysis. If you have any questions about formula in that list, just call me.

Me: Thanks! Are there any recommendations?  
Jerry: Can’t think of them immediately. Oh, it will be great if your module can be more interactive when using it. I usually feel a lot better when the product tells me what it is doing. And for calculations… can you try to make it faster than 1 second? My code needs to deal with real time data, so faster the better. Anyway, let’s keep in touch, and I would be perfectly fine if you send your design draft as long as you finish it. We will discuss detailed designs by then.

Me: No problems, I will tell you my progress.