Investing Advisor for Rookies

Group Two:
Jesse Storey
Harnek Dadiala
Matt Puttroff
Cory Graciano

Agenda

- Discuss and explain project idea
- Q&A
- Notebook Demonstration

We're providing a service to help new investors choose what to invest in

- Targeted for individuals looking to get started with investing, but who may not have the knowledge base or comfort level to choose what to invest in

- Our service will gather a little bit of suitability information from the investor, and will provide suggestions for which stocks they may want to purchase to get them started along their investment journey

Investment guidance derived from proprietary criteria:

- Risk Tolerance Questionnaire
- Sentiment Analysis
- Stock Price Modeling Long Short-Term Memory Model (LTSM)

Investment Universe

AMD - Advanced Micro Devices
NFLX - NetFlix
HD - Home Depot
GOOG - Alphabet Inc. Class C
CRM - Salesforce.com
PYPL - Paypal Holdings Inc
MSFT - Microsoft Corporation
APA - Apache
GM - General Motors Company
NVAX - Novavax, Inc

DIS - Walt Disney Co
SQ - Square Inc
AMZN - Amazon.com, Inc
FB - Meta Platforms Inc
MRVL - Marvell Technology Inc
NVDA - Nvidia Corporation
GME - GameStop Corp.
AAPL - Apple Inc
BABA - Alibaba Group Holding Ltd - ADR
TSLA - Tesla Inc

BTC-USD (Bitcoin, price in US Dollars)

Risk Tolerance Questionnaire

The RTQ is crafted to allow the service to provide to the investor investment guidance that suited specifically to them

RTQ Scoring:
Very Aggressive - 14% Stock, 5% Crypto allocation of Investable Assets
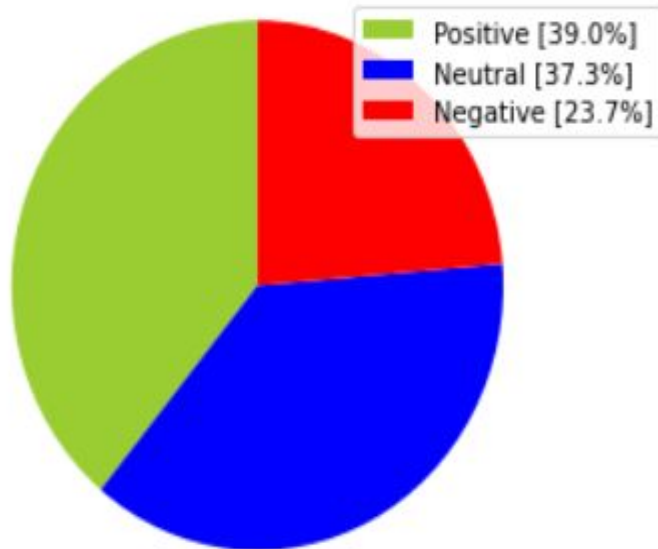Aggressive - 12% Stock, 4% Crypto allocation of Investable Assets
Moderate - 10% Stock, 3% Crypto allocation of Investable Assets
Conservative - 5% Stock, 2% Crypto allocation of Investable Assets
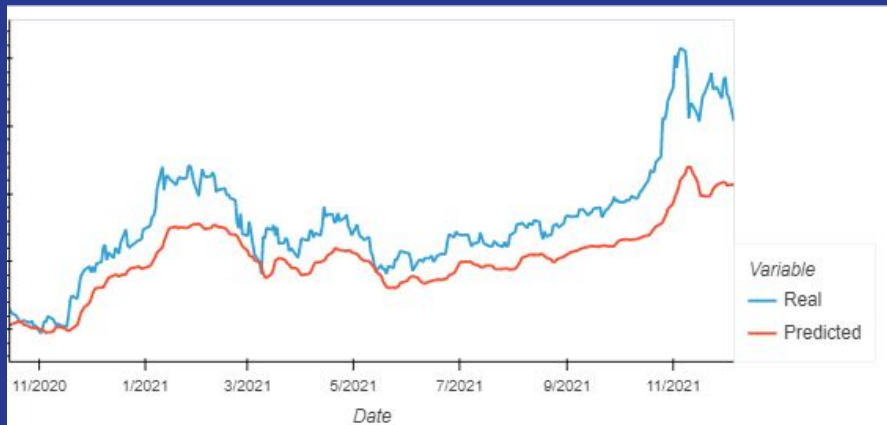Very Conservative - 2% Stock, 1% Crypto allocation of Investable Assets

Sentiment Analysis

Sentiment Analysis Result for keyword= $GME

Positive [39.0%]
Neutral [37.3%]
Negative [23.7%]

0	I like the stock 🍌 🚀 \n\n$AMC $GME #AMC #GM
1	$GME $AMC dumb apes got
2	@YoungBlkGifted @BlxckDollar @impactinvest_
3	@Zachariah_RN @_tradespotting @StickySox00
4	US STOCKS-Wall St closes lower ahead of in
...	
210	@NYSE Get rid of PFOF! $AMC $
211	Haha, I made a good meme!\n\n$GME\n#GME htt
212	Fortunately there's still time to trade out
213	$PTN hey what's that stock Blockbuster? Mig
214	$GME gap down tomorrow below 150 close at le

LSTM

Prediction on Test Data

3 Days in Future Prediction

Data sources/Libraries/Modules

- Yahoo Finance API
- TensorFlow
  - Keras
- Twitter API (tweepy)
- nltk
- sklearn

Results

Investment Guidance Report (examples will be shared during the Notebook Demonstration segment of our presentation)

Based on the results of the prediction Model (LSTM-RNN) and NLP social media (Twitter) analysis we can only provide projections 1-2 days out

Our prediction models are well developed – no certain method exists to accurately predict the future. Statistics can only serve to educate, they shouldn't be thought of as a way to prognosticate

Planned future enhancements

- Incorporate additional predictive algorithms to enhance understanding of what future asset values might be

- Offer additional cryptocurrency investments (ETH, BNB, USDT, etc.)

- Utilize algorithmic trading to implement and manage portfolios

Conclusion

- Q&A
- Notebook Demonstration