

# How to use our Application

## Introduction:

The application is designed keeping in mind the users who are familiar with the stocks market technicalities. We wanted to provide a portfolio where users can have a one-stop shop where users can monitor their investment and conduct initial due diligence on new investment opportunities.

Our application has three tabs:

- Stocks Portfolio
- About
- Dashboard

## Stock Portfolio:

This is the home page or the landing page of our application.

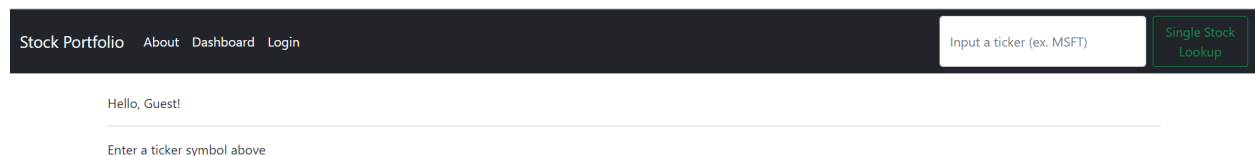


Fig.1

On the home page(Fig.1), the users can enter stock ticker of their choice at the input box present at the top right corner, upon clicking the “Stock Quote” button, the page is populated with relevant features, information and description for the company corresponding to the ticker input by the user (Fig.2).

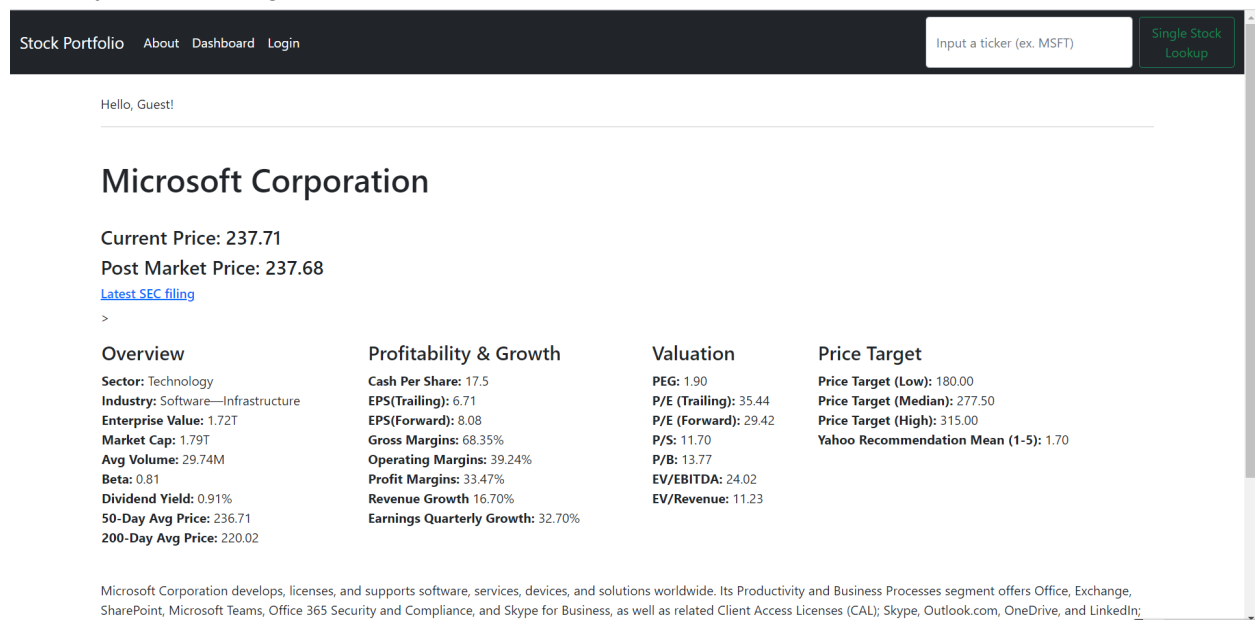


Fig.2

## About:

The “About” tab contains a description about the objective of this application and the project contributors.

Stock Portfolio

About

Dashboard

Login

Input a ticker (ex. MSFT)

Single Stock  
Lookup

Who are we?

We are a group of graduate students at the University of Washington. Our group consists of Jack Chen, Vincent Lan, William Frame, Junhao Zhang, Samuel Perebikovsky, Aniruddha Dutta

What is this website?

We want to create a portfolio management tool for value investors, where we capture a variety of valuation methods on a dashboard for investors to view easily.

Interested in learning more?

[Contact US](#)

Fig.3

## Dashboard:

This tab displays the financial stocks data for the Stock tickers that the user wants to compare and analyze.(Fig.4)

Stock Portfolio

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Input a ticker (ex. MSFT)

Single Stock  
Lookup

Which Stock?

Cost Basis

dd-mm-yyyy

How Many Shares Do You Own?

Add  
Stock

\*Please 'Login' to access dashboard features

Stock Ticker	Sector	Industry	Current Price	Beta	PEG	P/E (Trailing)	P/E (Forward)	P/B	EV/EBITDA	Delete
MSFT	Technology	Software—Infrastructure	237.71	0.81	1.90	35.44	29.42	13.77	24.02	Delete
AAPL	Technology	Consumer Electronics	125.57	1.25	1.90	34.06	26.83	31.90	24.86	Delete
GOOG	Communication Services	Internet Content & Information	2,092.52	1	1.75	35.70	25.74	6.35	23.39	Delete
U	Technology	Software—Application	108.89	N/A	-12.05	N/A	-680.56	N/A	-121.83	Delete

Download

Fig.4

Any ‘guest’ user can view the dashboard and add or delete stock tickers from the displayed table. However certain features such as adding the ‘Cost Basis’, ‘Purchase Date’ and ‘Shares’ along with the download option are restricted only for the registered users.

Users can login by clicking on the ‘Login’ at the navigation bar which will redirect them to a login page (Fig.5).



Stock Portfolio About Dashboard Login

Input a ticker (ex. MSFT) Single Stock Lookup

### Login

Username:

Password:

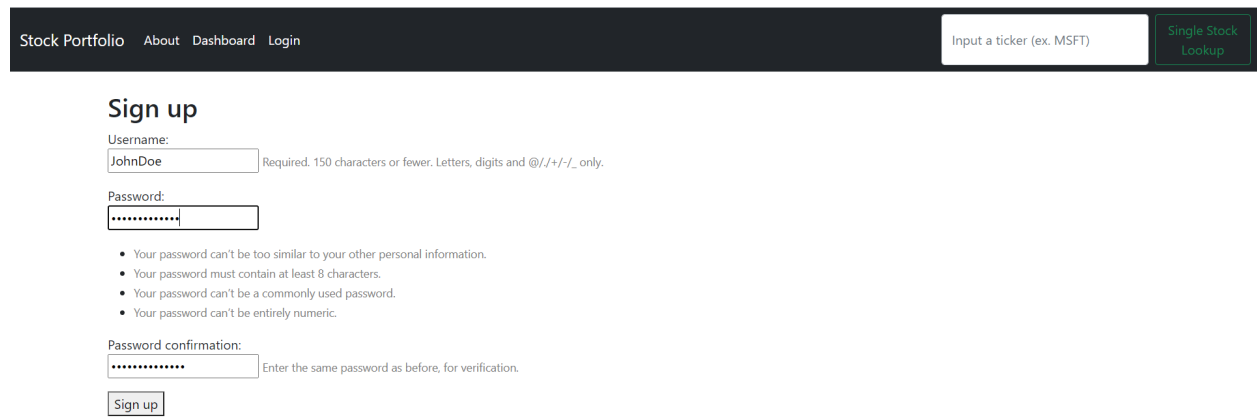
Login

Dont have an account? Register [here](#)

[Back to dashboard](#)

Fig.5

If the users don't already have an account registered with the application, they can also register (Fig.6). Upon successful registration, users will be redirected to the application home page where they can see their registered username displayed (Fig.7).



Stock Portfolio About Dashboard Login

Input a ticker (ex. MSFT) Single Stock Lookup

### Sign up

Username:  Required: 150 characters or fewer. Letters, digits and @/!+/-/\_ only.

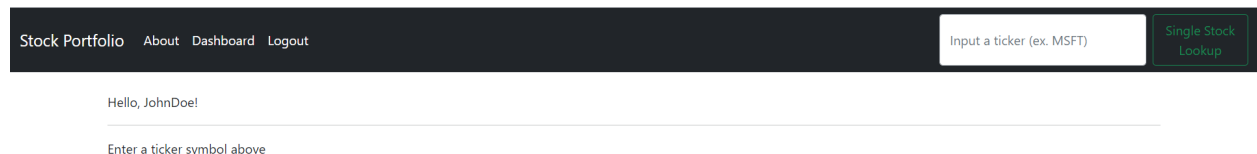
Password:

- Your password can't be too similar to your other personal information.
- Your password must contain at least 8 characters.
- Your password can't be a commonly used password.
- Your password can't be entirely numeric.

Password confirmation:  Enter the same password as before, for verification.

Sign up

Fig.6



Stock Portfolio About Dashboard Logout

Input a ticker (ex. MSFT) Single Stock Lookup

Hello, JohnDoe!

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Enter a ticker symbol above

Fig.7

Once the user is logged in, they can add new ticker information to the table along with the cost basis, purchase date and shares owned to the table. It prompts a message at the top indicating if the stock data was added or not. This is shown by Fig.8 and Fig.9. Dashboard also allows users to download the displayed data into a csv file by clicking the "Download" button at the bottom.

The users can also delete stocks from the table and the dashboard prompts a message coupons successfully deleting the data (Fig.10). If the user enters an invalid ticker, no new data is added on the dashboard, instead a message is displayed indicating that the ticker name is invalid (Fig.11).

## Dashboard

Stock Ticker	Cost Basis	Purchase Date	Shares	Sector	Industry	Current Price	Beta	PEG	P/E (Trailing)	P/E (Forward)	P/B	EV/EBITDA	Delete
MSFT	1.00	2021-03-10	2.000	Technology	Software—Infrastructure	237.71	0.81	1.90	35.44	29.42	13.77	24.02	Delete
AAPL	12.00	None	None	Technology	Consumer Electronics	125.57	1.25	1.90	34.06	26.83	31.90	24.86	Delete
GOOG	0.00	2021-03-16	0.000	Communication Services	Internet Content & Information	2,092.52	1	1.75	35.70	25.74	6.35	23.39	Delete
U	120.00	2021-03-10	7.000	Technology	Software—Application	108.89	N/A	-12.05	N/A	-680.56	N/A	-121.83	Delete

Download

Fig.8

## Dashboard

Stock has been added!

Stock Ticker	Cost Basis	Purchase Date	Shares	Sector	Industry	Current Price	Beta	PEG	P/E (Trailing)	P/E (Forward)	P/B	EV/EBITDA	Delete
MSFT	1.00	2021-03-10	2.000	Technology	Software—Infrastructure	237.71	0.81	1.90	35.44	29.42	13.77	24.02	Delete
AAPL	12.00	None	None	Technology	Consumer Electronics	125.57	1.25	1.90	34.06	26.83	31.90	24.86	Delete
GOOG	0.00	2021-03-16	0.000	Communication Services	Internet Content & Information	2,092.52	1	1.75	35.70	25.74	6.35	23.39	Delete
U	120.00	2021-03-10	7.000	Technology	Software—Application	108.89	N/A	-12.05	N/A	-680.56	N/A	-121.83	Delete
AMZN	100.00	2021-03-01	10.000	Consumer Cyclical	Internet Retail	3,091.86	1.13	1.68	73.91	46.78	16.65	32.66	Delete

Fig.8

Stock Portfolio

About

Dashboard

Logout

Single Stock Lookup

Stock has been delete!

×

Dashboard

Which Stock?

Cost Basis

dd-mm-yyyy

How Many Shares Do You Own?

Add Stock

Stock Ticker	Cost Basis	Purchase Date	Shares	Sector	Industry	Current Price	Beta	PEG	P/E (Trailing)	P/E (Forward)	P/B	EV/EBITDA	Delete
MSFT	1.00	2021-03-10	2.000	Technology	Software—Infrastructure	237.71	0.81	1.90	35.44	29.42	13.77	24.02	Delete
AAPL	12.00	None	None	Technology	Consumer Electronics	125.57	1.25	1.90	34.06	26.83	31.90	24.86	Delete
GOOG	0.00	2021-03-16	0.000	Communication Services	Internet Content & Information	2,092.52	1	1.75	35.70	25.74	6.35	23.39	Delete
AMZN	100.00	2021-03-01	10.000	Consumer Cyclical	Internet Retail	3,091.86	1.13	1.68	73.91	46.78	16.65	32.66	Delete

Fig.9

Stock Portfolio

About

Dashboard

Logout

Single Stock Lookup

AAPLE is an Invalid Ticker, please try again

×

Dashboard

Which Stock?

Cost Basis

dd-mm-yyyy

How Many Shares Do You Own?

Add Stock

Stock Ticker	Cost Basis	Purchase Date	Shares	Sector	Industry	Current Price	Beta	PEG	P/E (Trailing)	P/E (Forward)	P/B	EV/EBITDA	Delete
MSFT	1.00	2021-03-10	2.000	Technology	Software—Infrastructure	237.71	0.81	1.90	35.44	29.42	13.77	24.02	Delete
AAPL	12.00	None	None	Technology	Consumer Electronics	125.57	1.25	1.90	34.06	26.83	31.90	24.86	Delete
GOOG	0.00	2021-03-16	0.000	Communication Services	Internet Content & Information	2,092.52	1	1.75	35.70	25.74	6.35	23.39	Delete

Fig.10

## Application Backend:

The registered user profile details and the stocks data that they have added to the dashboard through our application are stored in the database of our application as shown in Fig.11 and Fig.12 respectively. Fig.13 gives more information about the saved ticker along with other information that the user input.

Django administration

WELCOME, ADMIN2.

Home

Authentication and Authorization

Users

AUTHENTICATION AND AUTHORIZATION

Groups

+ Add

Users

+ Add

QUOTES

Stocks

+ Add

Select user to change

Search

Action:

-----

Go

0 of 7 selected

<input type="checkbox"/>	USERNAME	EMAIL ADDRESS	FIRST NAME	LAST NAME	STAFF STATUS
<input type="checkbox"/>	JohnDoe				

Fig.11

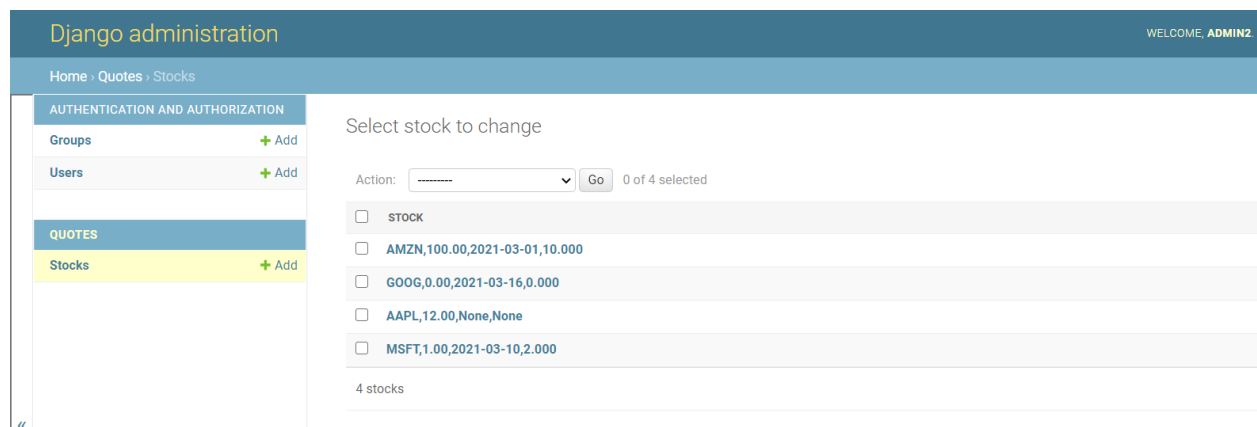


Fig.12

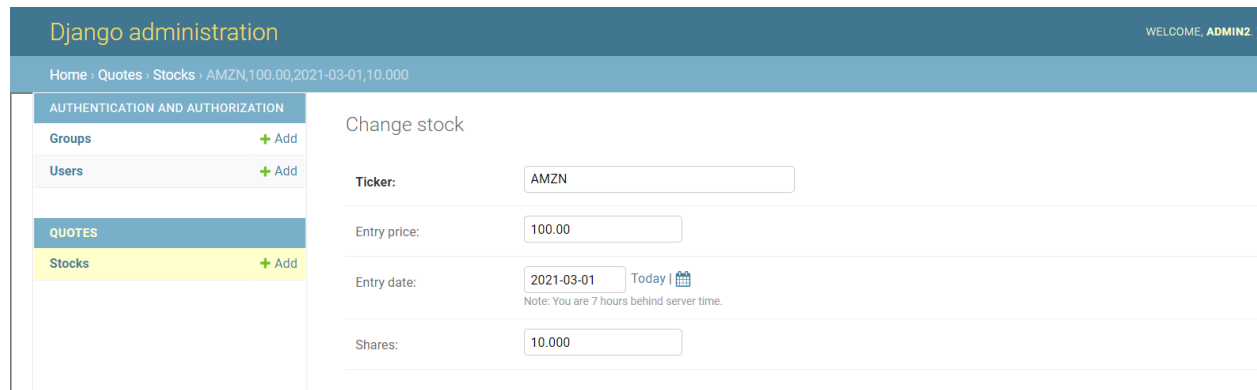


Fig.13