

Análisis Financiero con Snowflake, dbt, dlt y Power BI

JESÚS DE LA OLIVA IGLESIAS

Objetivo del proyecto

Insider Transactions Trending

Analytics (Fixed Window)

Analytics (Sliding Window)

Fundamental Data

Company Overview

ETF Profile & Holdings

Corporate Action - Dividends

Corporate Action - Splits

Income Statement Trending

Balance Sheet Trending

Cash Flow Trending

Earnings

Listing & Delisting Status

Earnings Calendar

IPO Calendar


Forex (FX)

Alpha Vantage API Documentation

Our [stock APIs](#) are grouped into eight categories: (1) Core Time Series Stock Data APIs, (2) US Options Data APIs, (3) Alpha Intelligence™, (4) Fundamental Data, (5) Physical and Digital/Crypto Currencies (e.g., Bitcoin), (6) Commodities, (7) Economic Indicators, and (8) Technical Indicators - also outlined [here](#). Examples in this documentation are for demo purposes. [Claim your free API key](#) today to explore our full API offerings!

Time Series Stock Data APIs

This suite of APIs provide global equity data in 4 different temporal resolutions: (1) daily, (2) weekly, (3) monthly, and (4) intraday, with 20+ years of historical depth. A lightweight ticker quote endpoint and several utility functions such as ticker search and market open/closure status are also included for your convenience.

 **S & P 500 by domain and aggregated by tickers (Sample)** Open

Overview Business Needs Data Dictionary Usage Examples More from Similarweb Ltd Related

S & P 500 by domain and aggregated by tickers

Key Data Attributes:

- company_name
- ticker
- domain
- Date
- country
- Desktop_Visits
- Desktop_Bounce_Rate
- Desktop_Avg_Visit_Duration
- Desktop_Pages_Per_Visit
- Mobile_Visits
- Mobile_Bounce_Rate
- Mobile_Avg_Visit_Duration
- Mobile_Pages_Per_Visit
- Total_Visits
- Total_Bounce_Rate
- Total_Avg_Visit_Duration
- Total_Pages_Per_Visit

Show Less

Refreshes
Daily

Geographic Coverage
Global
By country

Cloud Region Availability
AWS
EU (Paris)
(Your Region)
Asia Pacific (Jakarta)
Asia Pacific (Mumbai)
Asia Pacific (Osaka)
42 More

Legal Terms
Custom

About Similarweb Ltd
Similarweb provides a leading platform for digital intelligence, delivering a trusted, comprehensiv...

Company Name	Ticker	Domain	Country	Desktop_Visits	Desktop_Bounce_Rate	Desktop_Avg_Visit_Duration	Desktop_Pages_Per_Visit	Mobile_Visits	Mobile_Bounce_Rate	Mobile_Avg_Visit_Duration	Mobile_Pages_Per_Visit	Total_Visits	Total_Bounce_Rate	Total_Avg_Visit_Duration	Total_Pages_Per_Visit
Alibaba Group Holding Limited	099240	alibaba.com	China	123456789	0.12	0.0012	1.23	123456789	0.15	0.0015	1.56	246913578	0.135	0.00135	2.79
Amazon.com, Inc.	AMZN	amazon.com	USA	987654321	0.08	0.0008	0.89	987654321	0.10	0.0010	1.01	1975197632	0.09	0.0009	1.90
Apple Inc.	AAPL	apple.com	USA	876543210	0.05	0.0005	0.56	876543210	0.07	0.0007	0.78	1753086420	0.06	0.0006	1.34
Bank of America Corporation	BAC	bankofamerica.com	USA	765432109	0.20	0.0020	2.10	765432109	0.25	0.0025	2.60	1530864218	0.225	0.00225	2.35
BlackRock Inc.	BLK	blackrock.com	USA	654321098	0.10	0.0010	1.10	654321098	0.12	0.0012	1.30	1308642196	0.11	0.0011	1.20
Boji Group	BOJI	boji.com	Japan	543210987	0.05	0.0005	0.55	543210987	0.06	0.0006	0.66	1086421974	0.055	0.00055	1.11
Boji Group	BOJI	boji.com	Japan	543210987	0.05	0.0005	0.55	543210987	0.06	0.0006	0.66	1086421974	0.055	0.00055	1.11
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Boji Group	BOJI														


Limitaciones y recursos necesarios

Are there usage/frequency limits for the API service?

We are pleased to provide free stock API service covering the majority of our datasets for up to **25 requests per day**. If you would like to target a larger API call volume, please visit [premium membership](#).

```
"Symbol": "IBM",
"AssetType": "Common Stock",
"Name": "International Business Machines",
>Description": "International Business Machines Corporation (IBM) is an American multinational technology
renamed International Business Machines in 1924. IBM is incorporated in New York. IBM produces and sells compu
record for most annual U.S. patents generated by a business (as of 2020) for 28 consecutive years. Inventions
random-access memory (DRAM). The IBM mainframe, exemplified by the System/360, was the dominant computing plat
"CIK": "51143",
"Exchange": "NYSE",
"Currency": "USD",
"Country": "USA",
"Sector": "TECHNOLOGY",
"Industry": "COMPUTER & OFFICE EQUIPMENT",
"Address": "1 NEW ORCHARD ROAD, ARMONK, NY, US",
"OfficialSite": "https://www.ibm.com",
"FiscalYearEnd": "December",
"LatestQuarter": "2024-09-30",
"MarketCapitalization": "211743703000",
"EBITDA": "14676000000",
"PERatio": "33.33",
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"EPS": "6.87",
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"AnalystRatingBuy": "5",
"AnalystRatingHold": "0",
"AnalystRatingSell": "3",
"AnalystRatingStrongSell": "1",
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"ForwardPE": "21.23",
"PriceToSalesRatioTTM": "3.384",
"PriceToBookRatio": "8.66",
"EVToRevenue": "4.125",
"EVToEBITDA": "20.41",
"Beta": "0.71",
"52WeekHigh": "235.52",
"52WeekLow": "152.38",
"60DayMovingAverage": "220.63",
"200DayMovingAverage": "193.56",
"SharesOutstanding": "924645000",
"DividendDate": "2024-12-10",
"ExDividendDate": "2024-11-12"
```



 1.4.1 (latest) ▼ Blog

Getting started

Installation

Load data from a REST API

Load data from a SQL database

Load data from a cloud storage or a file system

Build a dlt pipeline

Core concepts

Sources

Destinations

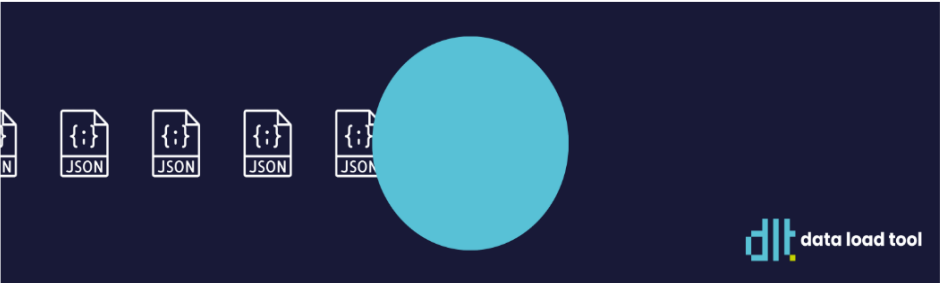
Using dlt


Deploying dlt

Getting started

Version: 1.4.1 (latest)

Getting started





What is dlt?

dlt is an open-source Python library that loads data from various, often messy data sources into well-structured, live datasets. It offers a lightweight interface for extracting data from [REST APIs](#), [SQL databases](#), [cloud storage](#), [Python data structures](#), and [many more](#).

```

import dlt
import requests
from typing import List, Dict
from datetime import datetime

# Configuración de Snowflake
#@dlt.resource(parallelized=True, table_name="empresa_data", write_disposition={"disposition": "merge", "strategy": "upsert"})
@dlt.resource(table_name="empresa_data", write_disposition='append')

#Función para obtener datos de empresas
def obtener_datos_empresas(api_key: str, fecha_ingesta: datetime) -> List[Dict]:
    """
    Obtiene datos financieros de las principales empresas en el ETF del S&P 500 usando Alpha Vantage.

    Args:
        api_key (str): La clave de API para Alpha Vantage.

    Returns:
        List[Dict]: Lista de diccionarios con los datos de las empresas.
    """
    # URL para obtener los holdings del ETF del S&P 500
    url_etf_profile = f"https://www.alphavantage.co/query?function=ETF_PROFILE&symbol=QQQ&apikey={api_key}"

    try:
        # Solicitud inicial para obtener las empresas
        r = requests.get(url_etf_profile)
        r.raise_for_status()
        datos = r.json()
        holdings_data = datos.get("holdings", [])

        # Extraer símbolos de las cinco primeras empresas
        nombres_empresas = [item['symbol'] for item in holdings_data if 'symbol' in item and item['symbol'] != 'n/a']
        primeras_cinco_empresas = nombres_empresas[10:15]
    
```



```

def obtener_datos_api(api_key: str, function: str, symbol: str, fecha_ingesta: datetime) -> Dict:
    try:
        # Añadir una nueva columna a cada fila de annualReports
        for report in datos.get('annualReports', []):
            report['simbolo'] = symbol
            report['fecha_carga'] = fecha_ingesta

        # Añadir una nueva columna a cada fila de annualReports
        for report in datos.get('quarterlyReports', []):
            report['simbolo'] = symbol
            report['fecha_carga'] = fecha_ingesta

        return datos

    except Exception as e:
        dlt.log(f"Error al obtener datos de la API para {symbol} con función {function}: {e}", level="error")
        return {}


# Crear el pipeline de DLT
pipeline = dlt.pipeline(
    import_schema_path="schemas/DATOS_FINANZAS",
    pipeline_name="pipeline_finanzas",
    destination="snowflake",
    dataset_name="Datos_finanzas"
)

# Ingestar datos al pipeline
def run_pipeline():
    """
    Ejecuta el pipeline para obtener datos de empresas y cargarlos en Snowflake.
    """
    try:
        fecha_ingesta = datetime.now().isoformat()











```

Ya tenemos todos los datos en Snow


▼  DATOS_BRONZE_FINANZAS

▼  DATOS_FINANZAS

▼ Tables

-  EMPRESA_DATA
-  EMPRESA_DATA__BALANCE_SHEET__ANNUAL_REPOR...
-  EMPRESA_DATA__BALANCE_SHEET__QUARTERLY_RE...
-  EMPRESA_DATA__CASH_FLOW__ANNUAL_REPORTS
-  EMPRESA_DATA__CASH_FLOW__QUARTERLY_REPORTS
-  EMPRESA_DATA__INCOME_STATEMENT__ANNUAL_RE...
-  EMPRESA_DATA__INCOME_STATEMENT__QUARTERLY...
-  _DLT_LOADS
-  _DLT_PIPELINE_STATE
-  _DLT_VERSION

▼  S_P_500_BY_DOMAIN_AND_AGGREGATED_BY_TICKERS_SAMPLE

▼  DATAFEEDS

▼ Tables

-  SP_500



🕒 Last 3 days ▾

🔍 Filters ▾

4732+ queries

Load more

CUENTA TRIAL DE SNOWFLAKE

AQUI LLEGA TU SALVADOR





COMPUTE_WH



Warehouse



ACCOUNTADMIN

Running Queued (Pr

0.0600

0.0450

0.0300

0.0150

0.0000

Nov 20

Query History

Status All

Use

SQL TEXT

Edit Warehouse



COMPUTE_WH as ACCOUNTADMIN

COMPUTE_WH

+ Add Comment

Type: Standard

Size: Small



Advanced Options



Auto-resume

Automatically resumes the warehouse when any statement that requires a warehouse is submitted.



Auto-suspend

Automatically suspends the warehouse if it is inactive for the specified period of time.

Suspend After

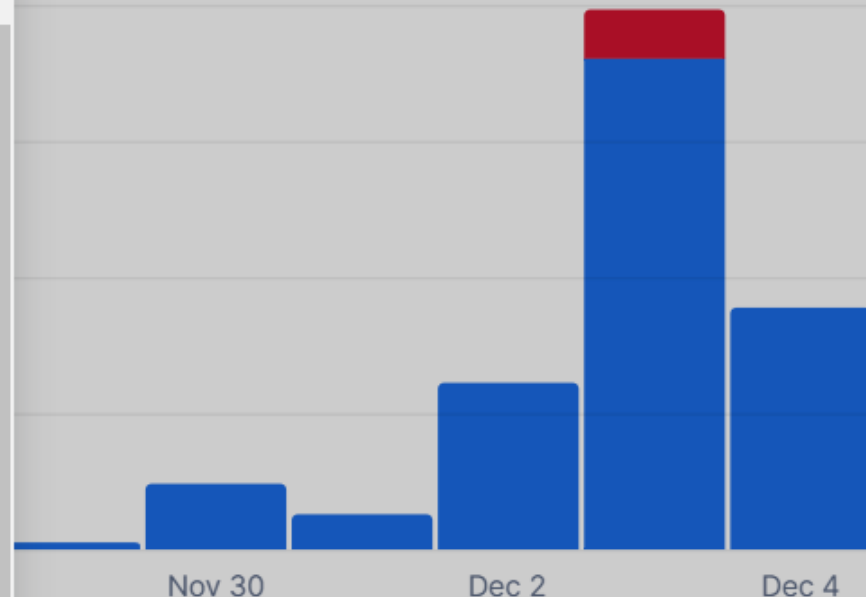
1

min(s) of inactivity

2 credits/hour

Cancel

Save Warehouse



Columns



USER

WAREHOU...

DURATI...

STARTED

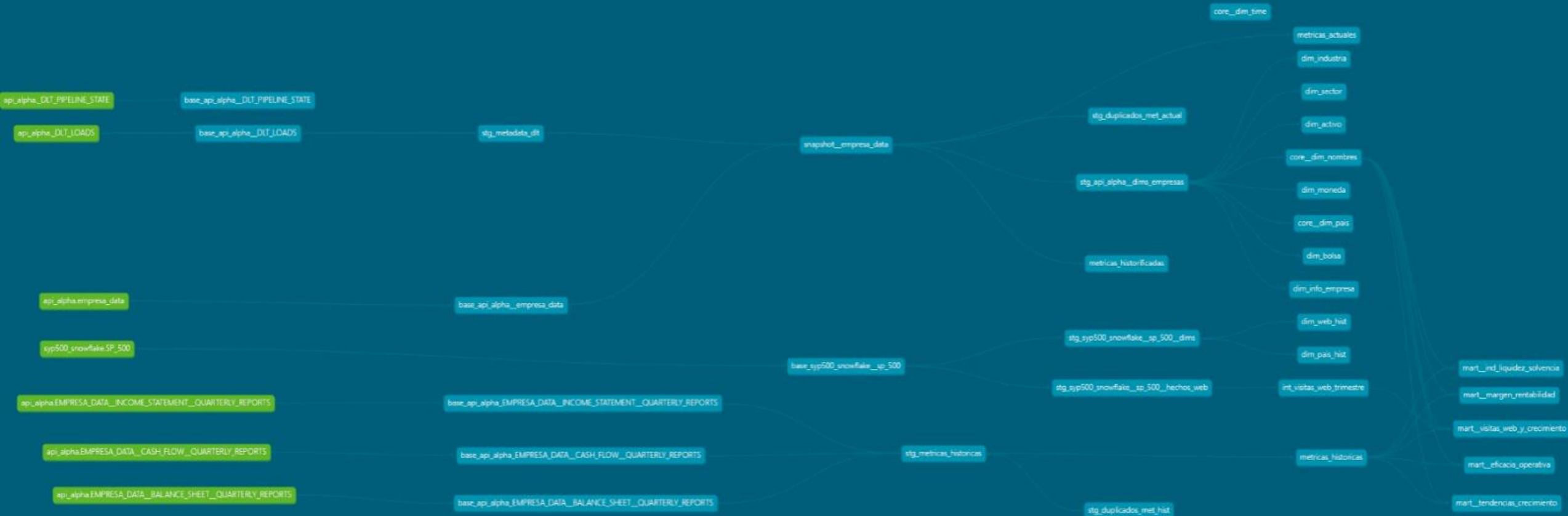
Configuración extra: Habilitando Cortex

```
ALTER ACCOUNT SET CORTEX_ENABLED_CROSS_REGION = 'AWS_EU';
```

```
with extraccion as (  
  select OVERVIEW__DESCRIPTION,  
         snowflake.cortex.translate(OVERVIEW__DESCRIPTION, 'en', 'es') as traduccion,  
         SNOWFLAKE.CORTEX.EXTRACT_ANSWER(  
           overview__description, 'What are all the different businesses, services, or products the company offers? with one word  
separated by commas')::string AS Extracted_Answer  
  
  from DATOS_BRONZE_FINANZAS.SEGURIDAD_DATOS.EMPRESA_DATA  
)
```

Modelo en dbt


Lineage Graph



Uso de Cortex


TRADUCCION	AMBITO_NEG1	AMBITO_NEG2	AMBITO_NEG3	AMBITO_NEG4	AMBITO_NEG5
Meta Platforms, Inc. desarrolla productos que permiten a las personas conectarse y	mobile devices	pcs	virtual reality headsets	wearables and he	null
Netflix, Inc. es una empresa estadounidense de producción y plataformas de conter	subscription - based streaming service	null	null	null	null
Broadcom Inc. es un diseñador, desarrollador, fabricante y proveedor global estado	data center	networking	software	broadband	wireless
Tesla, Inc. es una empresa estadounidense de vehículos eléctricos y energía limpia	electric cars	battery energy storage	solar panels and solar ro	null	null
Apple Inc. es una empresa tecnológica multinacional estadounidense especializada	consumer electronics	computer software	and online services	null	null
Microsoft Corporation es una empresa tecnológica multinacional estadounidense qu	computer software	consumer electronics	personal computers	null	null
Amazon.com, Inc. es una empresa tecnológica multinacional estadounidense que se	e - commerce	cloud computing	null	null	null
Nvidia Corporation es una empresa tecnológica multinacional estadounidense const	gaming and professional markets	as well as system on a c	null	null	null
Costco Wholesale Corporation (que hace negocios como Costco Wholesale y tambí	membership - only (needing a membersh	null	null	null	null
Alphabet Inc. es un conglomerado multinacional estadounidense con sede en Moun	technology company	null	null	null	null

Algunos tests y macros que he creado

proyecto_finanzas > macros >  fecha_inferiar_actual.sql

Add documentation or tests | You, 13 hours ago | 1 author (You)

```
1  {% macro test_fecha_inferior_actual(model, column_name) %}  
2  | SELECT *  
3  | FROM {{ model }}  
4  | WHERE {{ column_name }} > CONVERT_TIMEZONE('UTC', CURRENT_TIMESTAMP)  
5  + {% endmacro %}
```

proyecto_finanzas > macros >  max_tres_pala.sql

Add documentation or tests | You, yesterday | 1 author (You)

```
1  {% test max_tres_pala(model, column_name) %}  
2  | SELECT *  
3  | FROM {{ model }}  
4  | WHERE array_size(split({{ column_name }}, ' ')) > 3  
5  + {% endtest %}
```

Add documentation or tests | You, 3 days ago | 1 author (You)

```
{% macro trunc_ultimo_dia_trimes(date_column) %}  
    DATEADD(  
        'day',  
        -1,  
        DATEADD(  
            'quarter',  
            1,  
            DATE_TRUNC('quarter', {{ date_column }})  
        )  
    )  
{% endmacro %}
```

Documentando yml y modelos

```
CAST(TRIM(simbolo) AS VARCHAR(255)) AS simbolo, /* simbolo de la empresa */
{{ dbt_utils.generate_surrogate_key(['simbolo']) }} AS id_simbolo, /* Clave única para identificar los datos de la empresa */
CONVERT_TIMEZONE('Europe/Paris', 'UTC', TRIM(fecha_carga)) AS fecha_carga, /* fecha de la carga */
CAST(TRIM(FISCAL_DATE_ENDING) AS DATE) AS fecha_fiscal_final, /* Fecha de finalización del periodo fiscal */
CAST(TRIM(REPORTED_CURRENCY) AS VARCHAR(255)) AS moneda, /* Moneda reportada */
CAST(NULLIF(TRIM(TOTAL_ASSETS), 'None') AS numeric(20, 2)) AS total_activos, /* Total de activos */
CAST(NULLIF(TRIM(TOTAL_CURRENT_ASSETS), 'None') AS numeric(20, 2)) AS activos_corrientes, /* Activos corrientes */
CAST(NULLIF(TRIM(CASH_AND_CASH_EQUIVALENTS_AT_CARRYING_VALUE), 'None') AS numeric(20, 2)) AS efectivo_equivalente, /* Efectivo y equivalentes de efectivo */
CAST(NULLIF(TRIM(CASH_AND_SHORT_TERM_INVESTMENTS), 'None') AS numeric(20, 2)) AS efectivo_inversiones_corto_plazo, /* Inversiones a corto plazo */
CAST(NULLIF(TRIM(INVENTORY), 'None') AS numeric(20, 2)) AS inventario, /* Inventario */
CAST(NULLIF(TRIM(CURRENT_NET_RECEIVABLES), 'None') AS numeric(20, 2)) AS cuentas_por_cobrar, /* Cuentas por cobrar netas */
CAST(NULLIF(TRIM(TOTAL_NON_CURRENT_ASSETS), 'None') AS numeric(20, 2)) AS activos_no_corrientes, /* Activos no corrientes */
CAST(NULLIF(TRIM(PROPERTY_PLANT_EQUIPMENT), 'None') AS numeric(20, 2)) AS propiedades, /* Propiedades, planta y equipo */
CAST(NULLIF(TRIM(ACCUMULATED_DEPRECIATION_AMORTIZATION_PPE), 'None') AS numeric(20, 2)) AS depreciacion_acumulada, /* Depreciación acumulada */
CAST(NULLIF(TRIM(INTANGIBLE_ASSETS), 'None') AS numeric(20, 2)) AS activos_intangibles, /* Activos intangibles */
CAST(NULLIF(TRIM(INTANGIBLE_ASSETS_EXCLUDING_GOODWILL), 'None') AS numeric(20, 2)) AS activos_intangibles_sin_plusvalia, /* Activos intangibles excluyend
CAST(NULLIF(TRIM(GOODWILL), 'None') AS numeric(20, 2)) AS plusvalia, /* Plusvalía */
CAST(NULLIF(TRIM(INVESTMENTS), 'None') AS numeric(20, 2)) AS inversiones, /* Inversiones */
CAST(NULLIF(TRIM(LONG_TERM_INVESTMENTS), 'None') AS numeric(20, 2)) AS inversiones_largo_plazo, /* Inversiones a largo plazo */
CAST(NULLIF(TRIM(SHORT_TERM_INVESTMENTS), 'None') AS numeric(20, 2)) AS inversiones_corto_plazo, /* Inversiones a corto plazo */
CAST(NULLIF(TRIM(OTHER_CURRENT_ASSETS), 'None') AS numeric(20, 2)) AS otros_activos_corrientes, /* Otros activos corrientes */
CAST(NULLIF(TRIM(OTHER_NON_CURRENT_ASSETS), 'None') AS numeric(20, 2)) AS otros_activos_no_corrientes, /* Otros activos no corrientes */
CAST(NULLIF(TRIM(TOTAL_LIABILITIES), 'None') AS numeric(20, 2)) AS total_pasivos, /* Total de pasivos */
CAST(NULLIF(TRIM(TOTAL_CURRENT_LIABILITIES), 'None') AS numeric(20, 2)) AS pasivos_corrientes, /* Pasivos corrientes */
CAST(NULLIF(TRIM(CURRENT_ACCOUNTS_PAYABLE), 'None') AS numeric(20, 2)) AS cuentas_por_pagar, /* Cuentas por pagar corrientes */
CAST(NULLIF(TRIM(DEFERRED_REVENUE), 'None') AS numeric(20, 2)) AS ingresos_diferidos, /* Ingresos diferidos */
CAST(NULLIF(TRIM(CURRENT_DEBT), 'None') AS numeric(20, 2)) AS deuda_corriente, /* Deuda corriente */
CAST(NULLIF(TRIM(SHORT_TERM_DEBT), 'None') AS numeric(20, 2)) AS deuda_corto_plazo, /* Deuda a corto plazo */
CAST(NULLIF(TRIM(TOTAL_NON_CURRENT_LIABILITIES), 'None') AS numeric(20, 2)) AS pasivos_no_corrientes, /* Pasivos no corrientes */
```

```
- name: OVERVIEW__PE_RATIO
  description: "Relación precio-ganancias de la empresa."
  tests:
    - not_null

- name: OVERVIEW__PEG_RATIO
  description: "Relación precio-ganancias ajustada al crecimiento."
  tests:
    - not_null

- name: OVERVIEW__BOOK_VALUE
  description: "Valor contable de la empresa por acción."
  tests:
    - not_null

- name: OVERVIEW__DIVIDEND_PER_SHARE
  description: "Cantidad pagada en dividendos por acción."
  tests:
    - not_null

- name: OVERVIEW__DIVIDEND_YIELD
  description: "Rendimiento porcentual de los dividendos sobre el precio de la acción."
  tests:
    - not_null

- name: OVERVIEW__EPS
  description: "Ganancias por acción reportadas por la empresa."
  tests:
    - not_null
```