Group Four Project Proposal

A brief articulation of your chosen topic and rationale

We are a team of data engineers who have been approached by a small-time hedge fund manager to build a summary investment portfolio dashboard for them, in order to help them track the progress of the share portfolios for the clients that they manage.

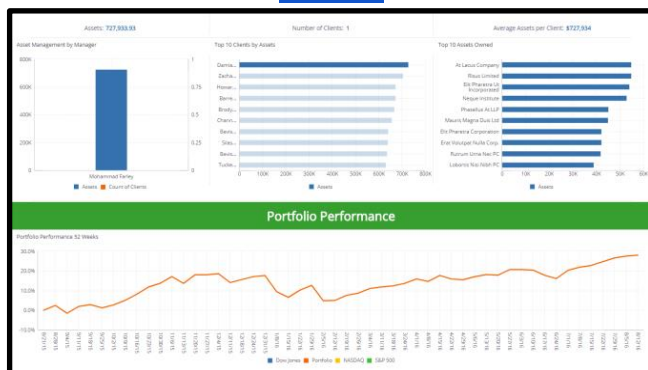The hedge fund manager would like to use the dashboard to

- Enter a stock into the system
- Create a portfolio for a client in the system which includes
    - The client's name.
    - The stock's they bought, how many, and at what price.
- See the following information
    - Total assets/amount invested managed (**text**)
    - Today's total asset/amount invested overall gain or loss (**text**)
    - Top clients by assets/amount invested (**horizontal bar chart**)
    - Stocks managed (**pie chart**)
    - Total portfolio performance for all clients (**line graph**)

A link to your data set(s) and a screenshot of the metadata if it exists.
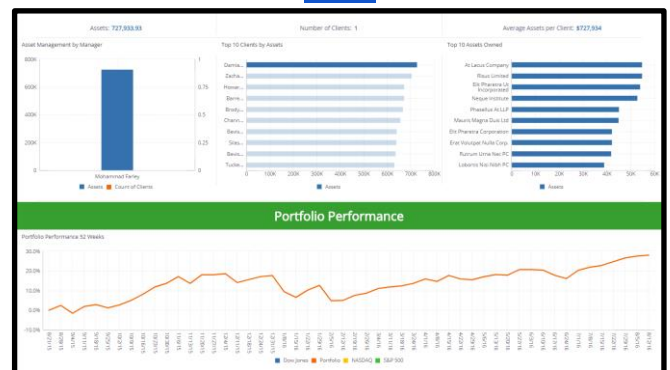
https://au.finance.yahoo.com/

3 or 4 screenshots of relevant, "inspiring" visualizations that frame your creative fodder
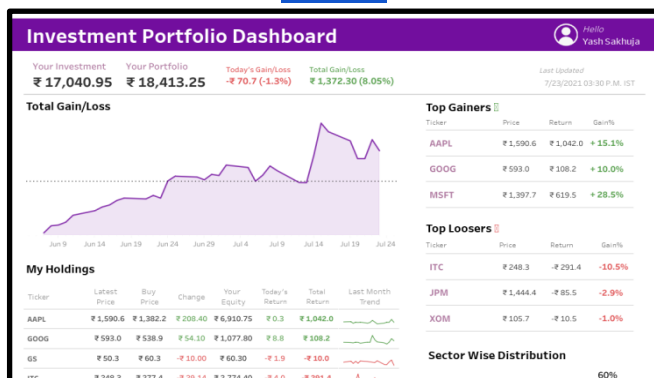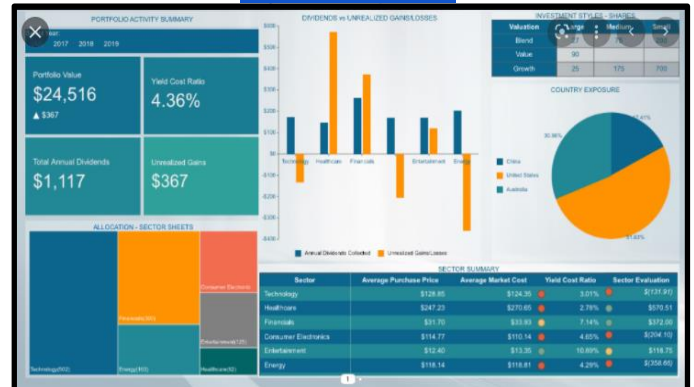
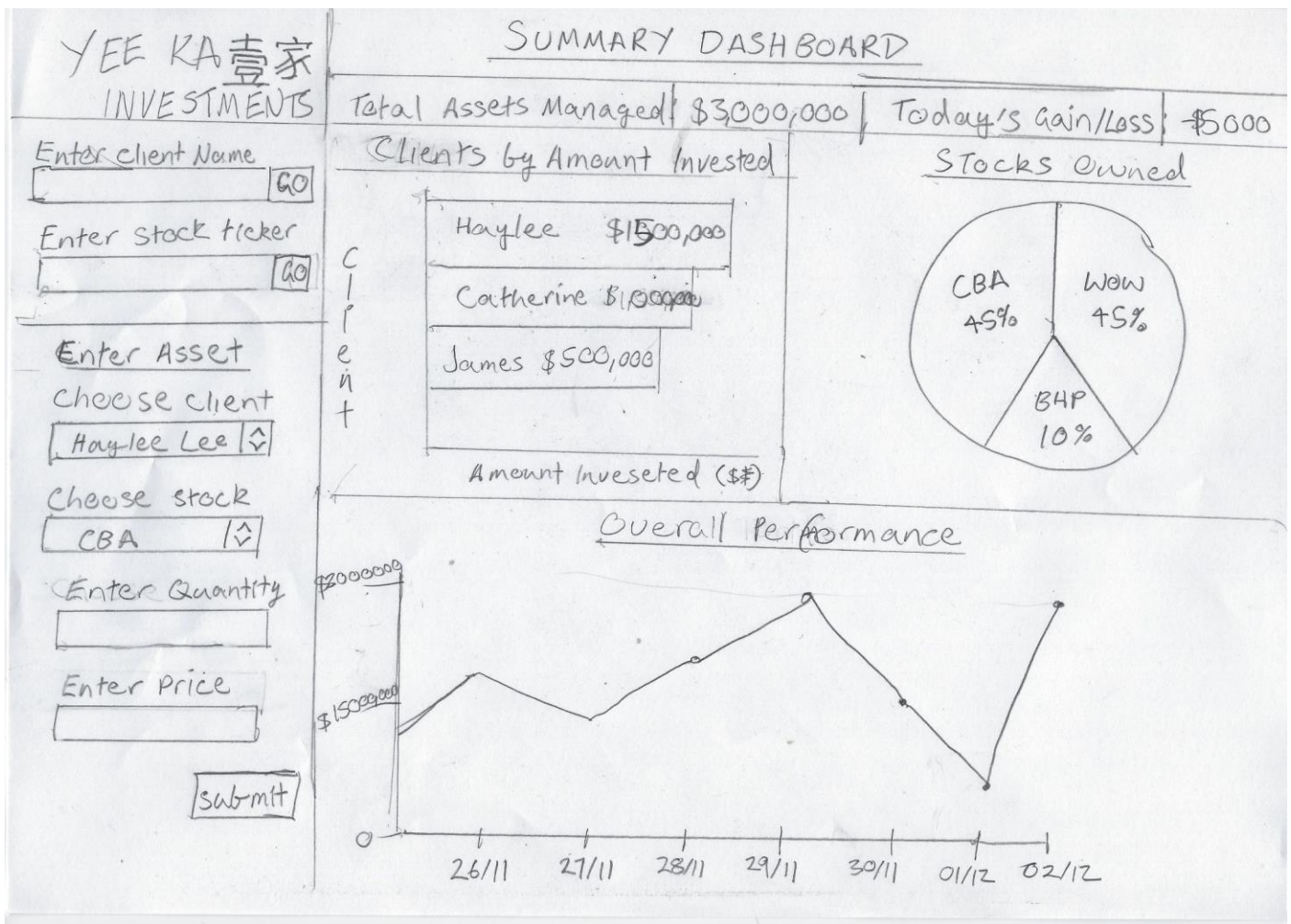Sisense

Excel

Tableau

Wyn Enterprises

A sketch of the final design

Summary Investment Portfolio Dashboard

A link to the primary GitHub repository you'll be housing your work in

https://github.com/James-Akerman/project-two

Bonus

Click on a client name to see this information (BONUS)

If time allows the hedge fund manager would like to be able to go into more detail about the portfolio makeup of each client. They would like to be redirected to a new page where they can see the following information
- Total assets managed (**text**)
- Today's gain/loss (**text**)
- Stock performance **(table)**
- Stocks owned (**pie chart**)
- Total portfolio performance (**line graph**)

YEE KA壹家 INVESTMENTS

Client Portfolio Dashboard

Client | Hayee Lee | Total Assets Managed | 15000,000 | Todays gain/Loss | -$2000

Stocks Performance

Stock	Change
Commonwealth Bank	+0.15%
Woolworths	+0.50%
Westfarmers	-2.12%

Stocks owned

WES 38%
CBA 45%
WOL 17%

Portfolio Performance

↑$1500,000

0   29/11   30/11   01/12   02/12