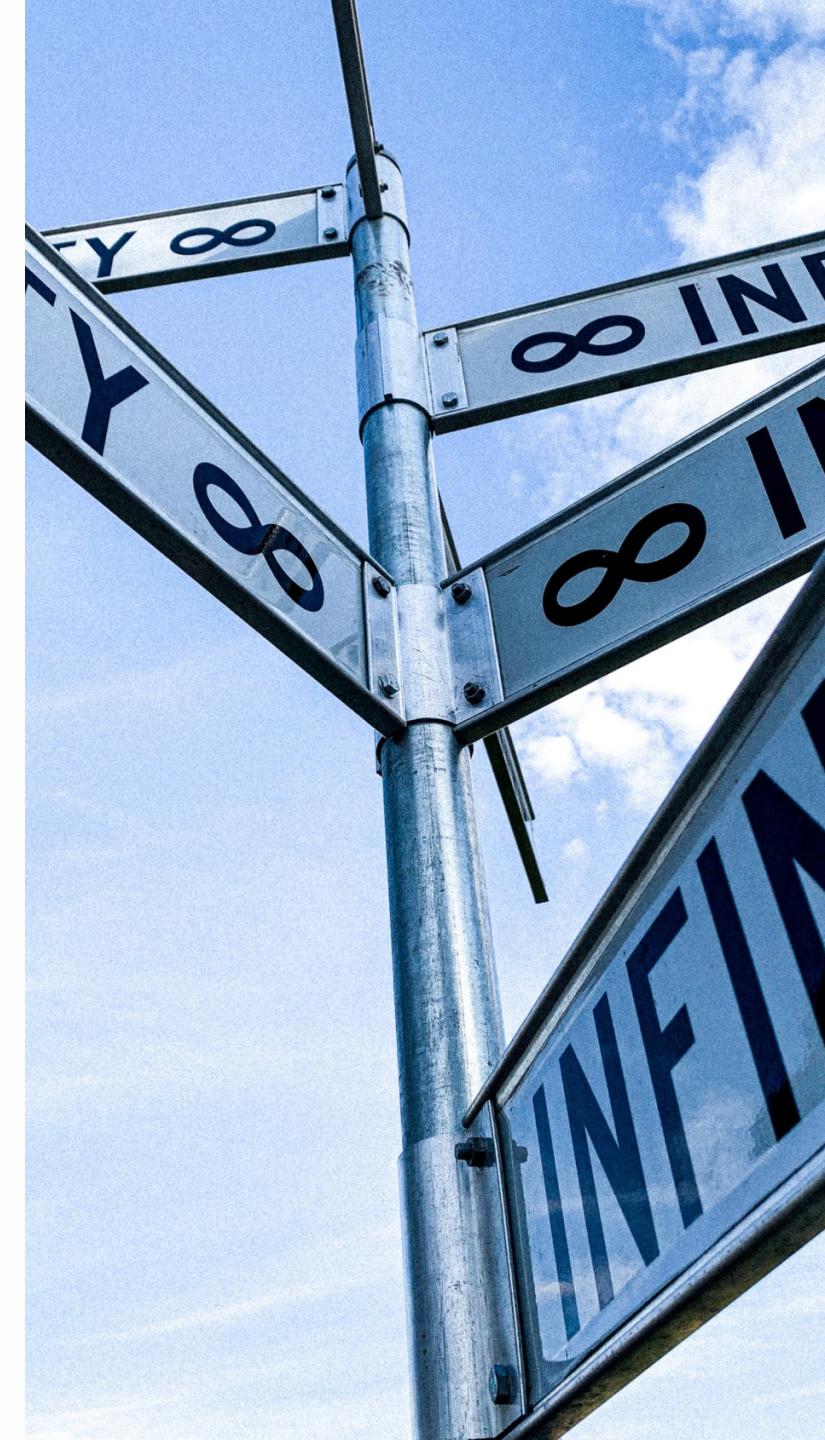


Project 3 - Group 3 - Possible

We've combined the tech of Trading Algo, Machine Learning, and Sentiment analysis, Back-testing, with some unique client (&potentially B2B) interface. Traditional investing may be feeling the pinch, with AI enhancements, but potential investors also need a plan B. Ask yourself what's possible.



Possible Investments Benefits Overview



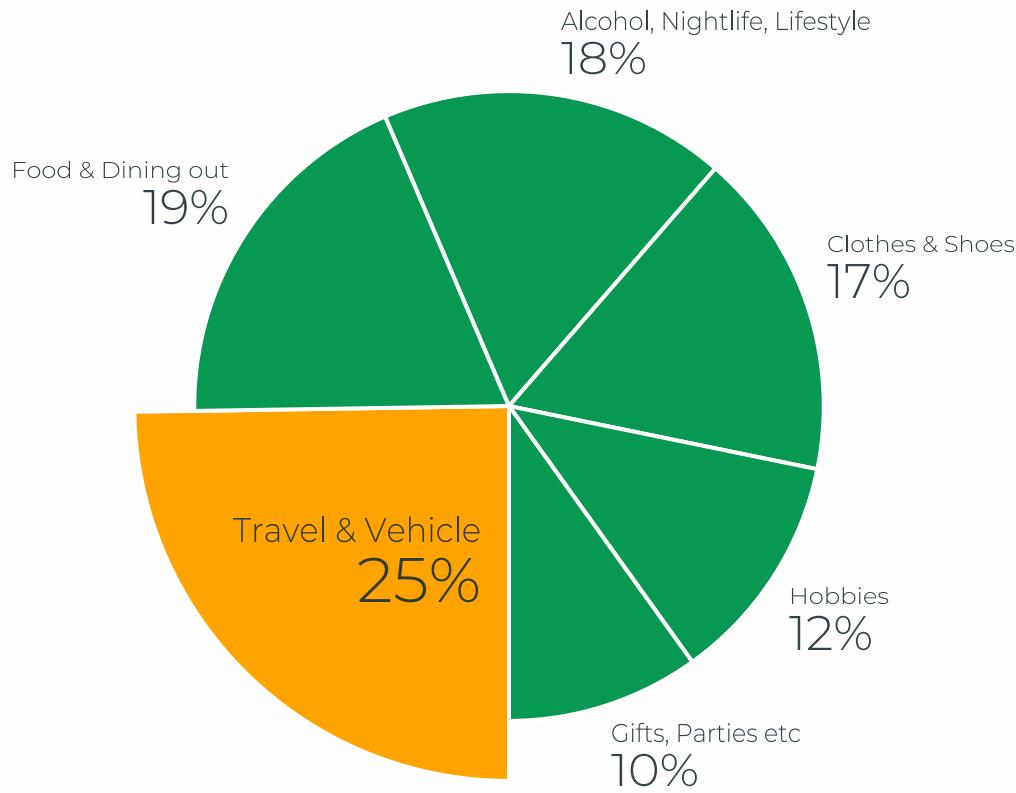
3 main premises

- Invest, sure but know what you can save, and therefore invest regularly.....address your top 3-5 variable expenses that keep you up at night -
- Diversify, and also be tax, and legislation aware.
- Long term, with AI, & ML backing you

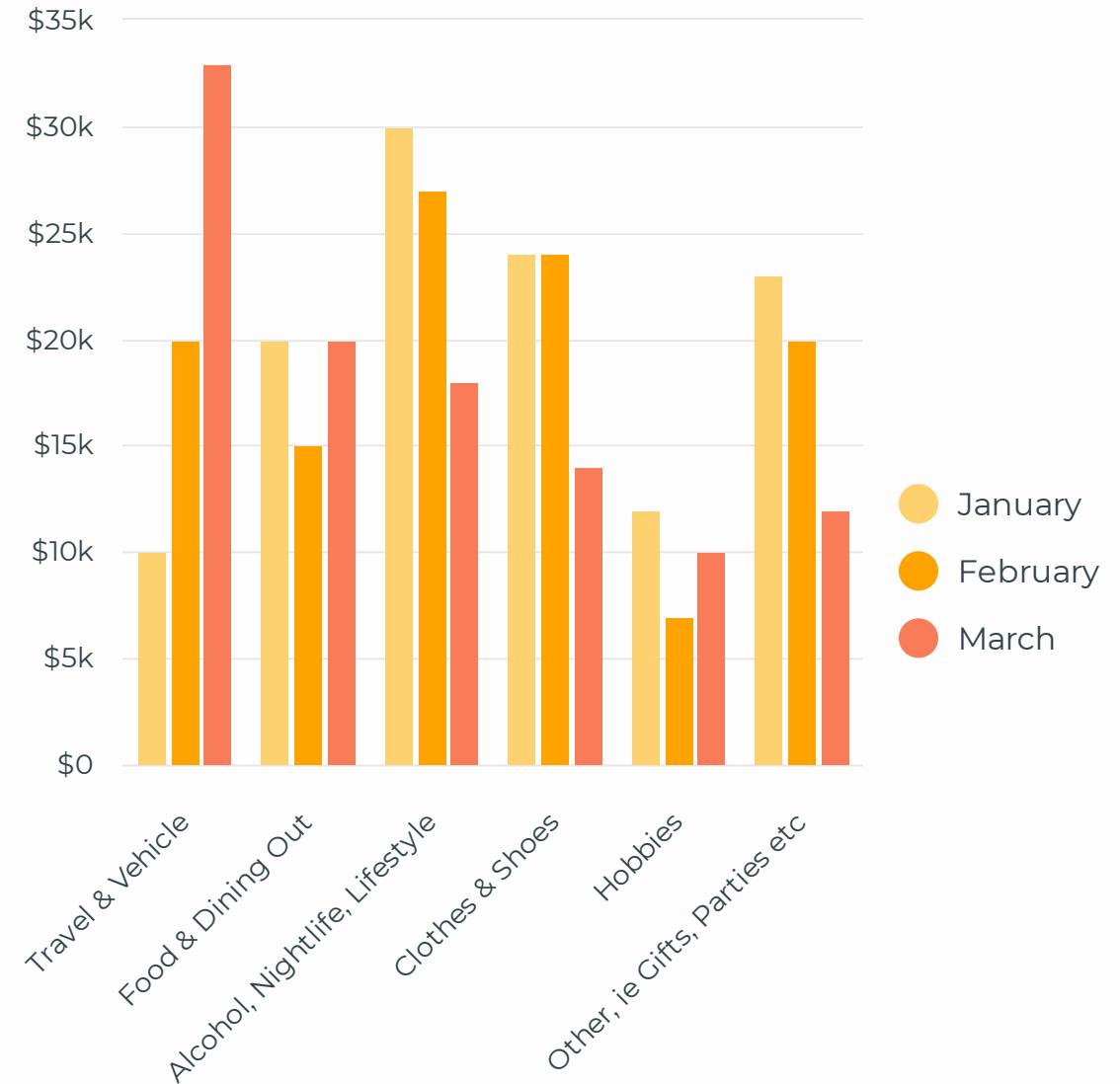
Possible Investments Benefits Overview



Compliant, tailored,
instantaneous Robo Advice
with punch



Top Variable Expenses



Expenditures by Month

Time for change/disruption



Been caught out in the debacle of fees for no service?

Lately, getting advice has lead to the famous: "fees for no service" debacle...sorry AMP, when you charge dead people you get noticed.



Advice has been all about Plan A....wealthy people with deadlines, ie pending retirement....what about a Plan B, when someone just wants a robust investment: online, or on smartphone



Possible's view is that if you are willing to give up just 1 fave burger, wrap, or pizza meal per month, we can help you build wealth. You prepared to hold \$12.95 per month aside so you can eat steak in retirement?...find out how...

details

Last name	Given names	Preferred name
Penner	Jim	Jim
Gender	Marital status	
Male	Married	
Country / place of birth	Home address	Postal address
Select Country / place of birth	Home address	Postal address

How much of your take home pay do you think you would be able to save in the coming year?
Question 5

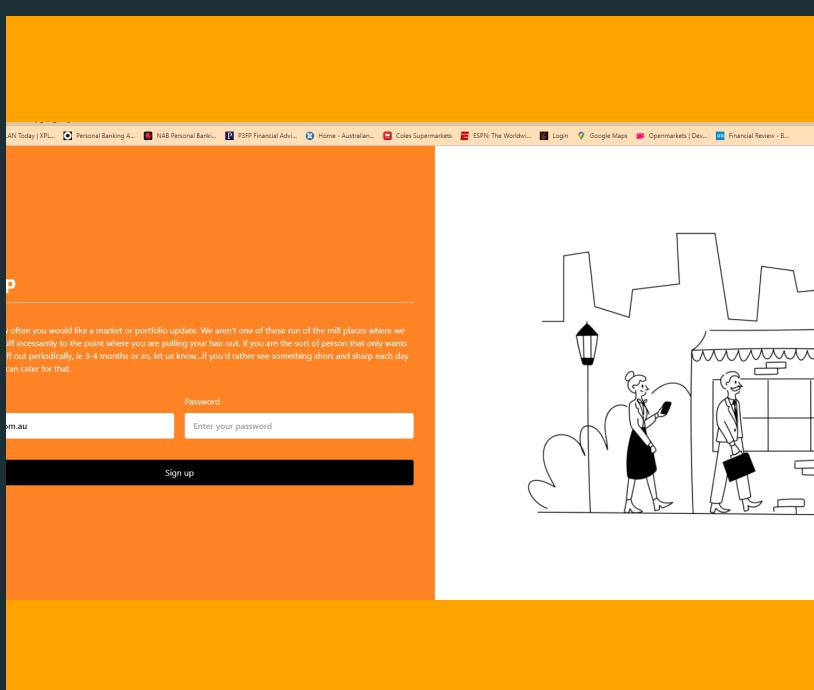
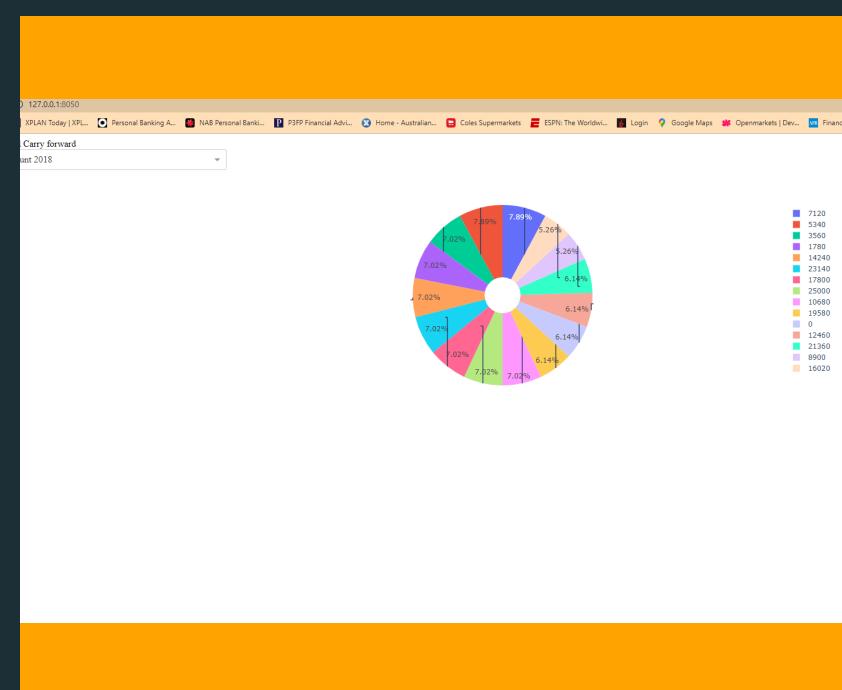
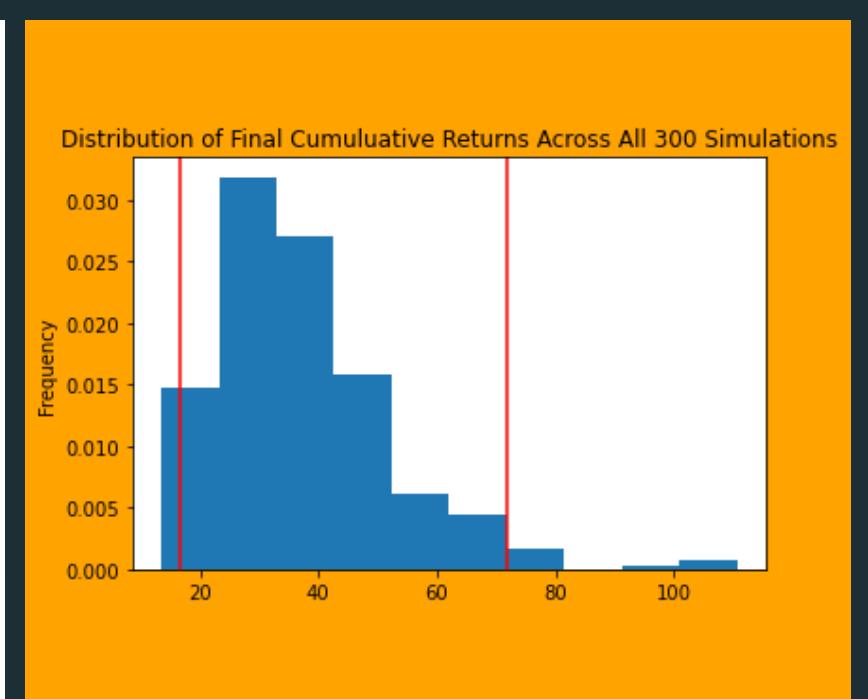
Approximately 10 to 15% Approximately 15 to 20%

Approximately 20 to 25% Over 25%

What is your after tax annual income?
Question 6

\$70,000 or less \$70,001 - \$180,000

\$180,001 - \$300,000 Over \$300,000



Channels Monitoring

- I'd like to book a meeting with `[chooseAdvised]`
- I'd like a meeting with `[chooseAdvised]` about investing
- I'd like to plan for my retirement
- I would like to invest for my retirement
- I want to invest for my retirement
- I'm worried about my retirement
- I want the best option to invest for my retirement
- I'm [age] and I want to invest for my retirement
- I'm [age] and I would like to invest for my retirement
- I want to save money for my retirement

Lambda initialization and validation

Slots

Priority	Required	Name	Slot type	Version	Prompt	Settings
1.	✓	firstName	AMAZON.First Name	Built-in	Could you please give me your first name?	...

Inspect response

Dialog State: ElicitSlot



Ascent to Wealth

“Rule No. 1 is never lose money, Rule No. 2 is never forget rule No. 1”

Warren Buffett

Step 1: Foundations

Identify buy/sell rules, address diversification. Although traditional portfolio management is losing ground to AI, and ML some merit to minimum of 15 direct shares, and 10 GICS Sectors

Step 2: Expedition - Key Variables

Short-term and Long-Term Moving Averages, Sharpe Ratios, and Correlation, as well as Stop Loss and Take Profit Rules - many variations of SMA/LMA and Stop Loss/Take Profit were investigated

Step 3: Summit

May have to back track to reach your goal....backtest, analyse and assess best combinations, and grade and accept preferred system. Be prepared to adapt, and avoid biases

Work/Life

Exploring Sentiment in 3 Large Caps & Tech Usage



Latest sentiment on Microsoft, Google, and Meta



SMA/LMA, Stop-Loss, and Take-profits, Winning Trade %ges, Drawdown, Financial Ratios, 52 week highs/lows, EMA's



Tech used in this project:
Pandas, Python, Streamlit,
Finta, Dash, Figma, Miro,
ML, VS Code, JL, Yahoo
Finance

Protecting your capital through active management

General consensus is that buy/hold of exposure to equities is the best long term strategy through Exchange Traded Funds.

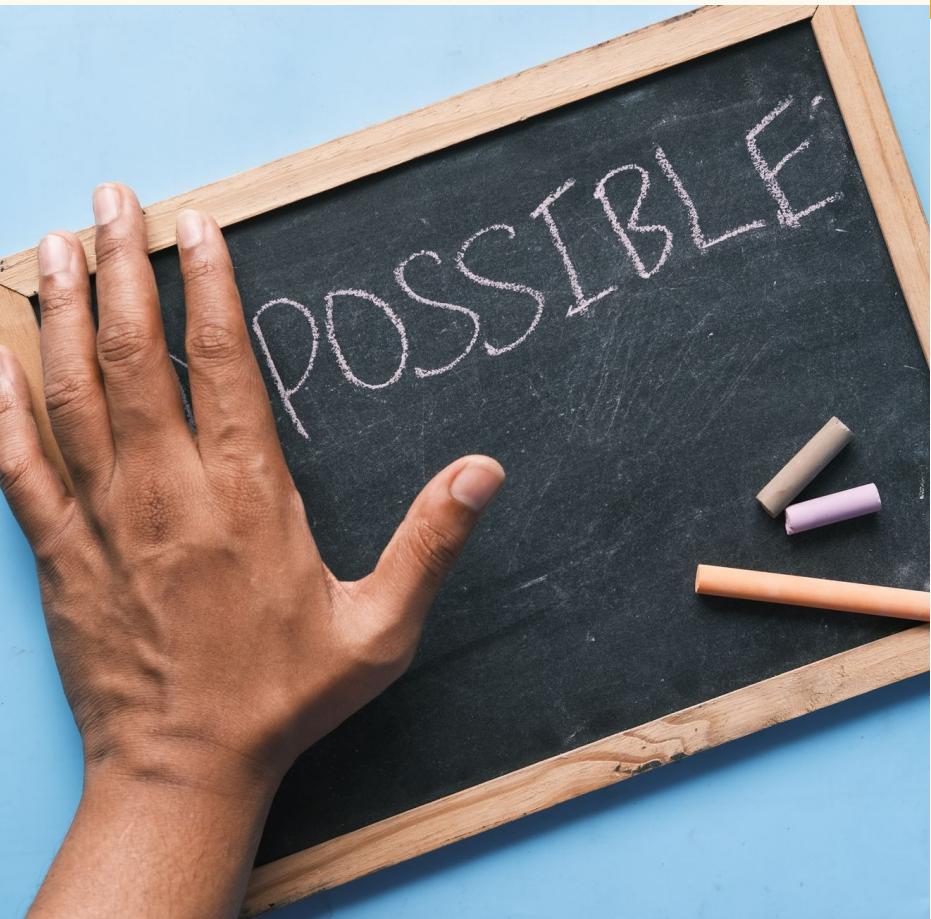
We look to evaluate this by accessing financial information through API such as Alpha Vantage and Yahoo Finance API



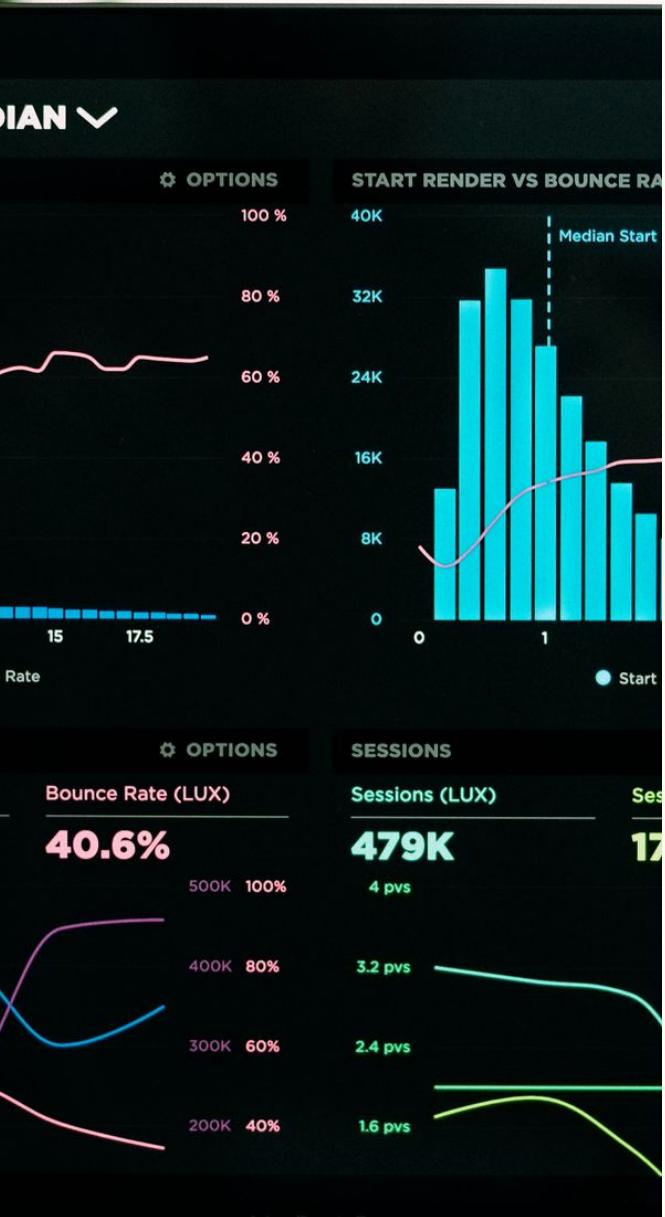
We look to generate entry signals into major market indices through technical indicators. Aroon indicator gave us a momentum signal to buy and sell in major equity indices.



Challenges we had



The Alpha Vantage API was used to access the financial information on the Dow Jones Industrial Index. At this point we are still looking finalise entry and exit levels on the major index so which can then translate to executing buys and sell in the portfolio.



Build Stock Screener

1. Import & Clean data for various US, Australian, and other data
2. Moving averages
3. 52 week Highs/Lows
4. Selected 1 year timeframe, more is suggested if long term view

Financial Ratio Analysis

1. Earnings Growth
2. Beta
3. PE/PEG Ratio
4. Momentum Indicators
5. Ability to select ranges and build custom portfolio or choose selected successful long term portfolio

Outcomes & Walk Through

1. Weighted portfolio set via portfolio balancing rules
2. Fin Ratio tables
3. Correlation table
4. Performance summary
5. Monte Carlo Sims



Let's
have
a look

Thanks,
Question time.

