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iexfinance 0.5.0

```
pip install iexfinance
```

✓ Latest version

Released: Dec 11, 2020

Python module to get stock data from IEX Cloud and IEX API 1.0

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Project description

build failing | codecov 72% | pypi package 0.5.0 | License Apache 2.0

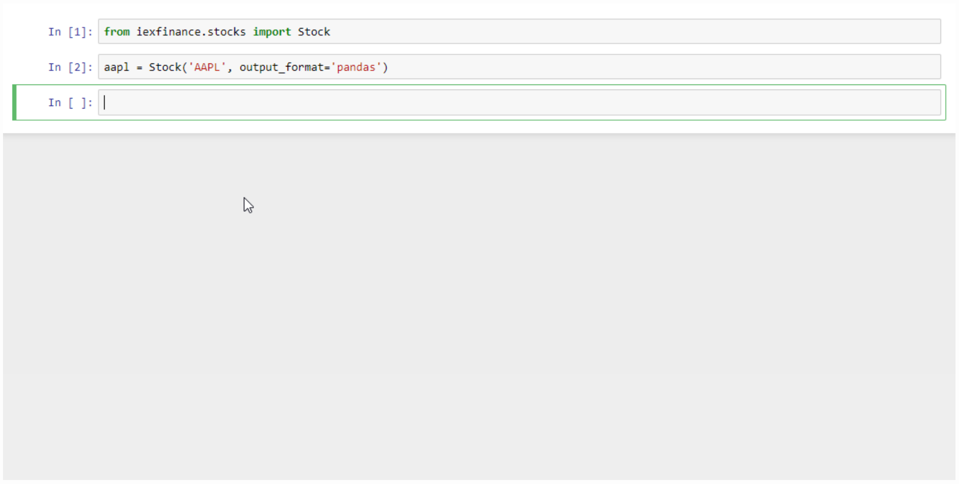
Python SDK for IEX Cloud. Architecture mirrors that of the IEX Cloud API (and its documentation).

An easy-to-use toolkit to obtain data for Stocks, ETFs, Mutual Funds, Forex/Currencies, Options, Commodities, Bonds, and Cryptocurrencies:

- Real-time and delayed quotes
- Historical data (daily and minutely)
- Financial statements (Balance Sheet, Income Statement, Cash Flow)
- End of Day Options Prices
- Institutional and Fund ownership
- Analyst estimates, Price targets
- Corporate actions (Dividends, Splits)
- Sector performance
- Market analysis (gainers, losers, volume, etc.)

- IEX market data & statistics (IEX supported/listed symbols, volume, etc)
- Social Sentiment and CEO Compensation

Example



```
In [1]: from iexfinance.stocks import Stock
In [2]: aapl = Stock('AAPL', output_format='pandas')
In [ ]: |
```

Documentation

Stable documentation is hosted on github.io.

Development documentation is also available for the latest changes in master.

Install

From PyPI with pip (latest stable release):

`$ pip3 install iexfinance`

From development repository (dev version):

```
$ git clone https://github.com/addisonlynch/iexfinance.g
$ cd iexfinance
$ python3 setup.py install
```

What’s Needed to Access IEX Cloud?

Stars: 644

Forks: 137

Open issues: 27

Open PRs: 3

View statistics for this project via Libraries.io, or by using our public dataset on Google BigQuery

Meta

License: Apache Software License (Apache)

Author: Addison Lynch

stocks, market, finance, iex, quotes, shares, currency

Maintainers

addisonlynch

Classifiers

Development Status

- 4 - Beta

Intended Audience

- Developers
- Financial and Insurance Industry

License

- OSI Approved :: Apache Software License

Operating System

- OS Independent

Programming Language

- Python
- Python :: 3
- Python :: 3.4
- Python :: 3.5
- Python :: 3.6

Topic

- Office/Business :: Financial :: Investment
- Software Development :: Libraries :: Python Modules

An IEX Cloud account is required to acecss the IEX Cloud API. Various plans are availalbe, free, paid, and pay-as-you-go.

Your IEX Cloud (secret) authentication token can be passed to any function or at the instantiation of a `Stock` object. The easiest way to store a token is in the `IEX_TOKEN` environment variable.

Passing as an Argument

The authentication token can also be passed to any function call:

```
from iexfinance.refdata import get_symbols

get_symbols(token="<YOUR-TOKEN>")
```

or at the instantiation of a `Stock` object:

```
from iexfinance.stocks import Stock

a = Stock("AAPL", token="<YOUR-TOKEN>")
a.get_quote()
```

How This Package is Structured

`iexfinance` is designed to mirror the structure of the IEX Cloud API. The following IEX Cloud endpoint groups are mapped to their respective `iexfinance` modules:

The most commonly-used endpoints are the Stocks endpoints, which allow access to various information regarding equities, including quotes, historical prices, dividends, and much more.

The `Stock` object provides access to most endpoints, and can be instantiated with a symbol or list of symbols:

```
from iexfinance.stocks import Stock
```

```
aapl = Stock("AAPL")
aapl.get_balance_sheet()
```

The rest of the package is designed as a 1:1 mirror. For example, using the Alternative Data endpoint group, obtain the Social Sentiment endpoint with `iexfinance.altdata.get_social_sentiment`:

```
from iexfinance.altdata import get_social_sentiment

get_social_sentiment("AAPL")
```

Common Usage Examples

The iex-examples repository provides a number of detailed examples of iexfinance usage. Basic examples are also provided below.

Real-time Quotes

To obtain real-time quotes for one or more symbols, use the `get_price` method of the `Stock` object:

```
from iexfinance.stocks import Stock
tsla = Stock('TSLA')
tsla.get_price()
```

or for multiple symbols, use a list or list-like object (Tuple, Pandas Series, etc.):

```
batch = Stock(["TSLA", "AAPL"])
batch.get_price()
```

Historical Data

It’s possible to obtain historical data using `get_historical_data` and `get_historical_intraday`.

Daily

To obtain daily historical price data for one or more symbols, use the `get_historical_data` function. This will return a daily time-series of the ticker requested over the desired date range (`start` and `end` passed as `datetime.datetime` objects):

```
from datetime import datetime
from iexfinance.stocks import get_historical_data

start = datetime(2017, 1, 1)
end = datetime(2018, 1, 1)

df = get_historical_data("TSLA", start, end)
```

To obtain daily closing prices only (reduces message count), set `close_only=True`:

```
df = get_historical_data("TSLA", "20190617", close_only=
```

For Pandas DataFrame output formatting, pass `output_format`:

```
df = get_historical_data("TSLA", start, end, output_form
```

It's really simple to plot this data, using matplotlib:

```
import matplotlib.pyplot as plt

df.plot()
plt.show()
```

Minutely (Intraday)

To obtain historical intraday data, use `get_historical_intraday` as follows. Pass an optional `date` to specify a date within three months prior to the current day (default is current date):

```
from datetime import datetime
from iexfinance.stocks import get_historical_intraday

date = datetime(2018, 11, 27)

get_historical_intraday("AAPL", date)
```

or for a Pandas Dataframe indexed by each minute:

```
get_historical_intraday("AAPL", output_format='pandas')
```

Fundamentals

Financial Statements

Balance Sheet

```
from iexfinance.stocks import Stock

aapl = Stock("AAPL")
aapl.get_balance_sheet()
```

Income Statement

```
aapl.get_income_statement()
```

Cash Flow

```
aapl.get_cash_flow()
```

Modeling/Valuation Tools

[Analyst Estimates](#)

```
from iexfinance.stocks import Stock

aapl = Stock("AAPL")

aapl.get_estimates()
```

[Price Target](#)

```
aapl.get_price_target()
```

Social Sentiment

```
from iexfinance.altdata import get_social_sentiment
get_social_sentiment("AAPL")
```

CEO Compensation

```
from iexfinance.altdata import get_ceo_compensation
get_ceo_compensation("AAPL")
```

Fund and Institutional Ownership

```
from iexfinance.stocks import Stock
aapl = Stock("AAPL")

# Fund ownership
aapl.get_fund_ownership()

# Institutional ownership
aapl.get_institutional_ownership()
```

Reference Data

List of Symbols IEX supports for API calls

```
from iexfinance.refdata import get_symbols

get_symbols()
```

List of Symbols IEX supports for trading

```
from iexfinance.refdata import get_iex_symbols

get_iex_symbols()
```

Account Usage

Message Count

```
from iexfinance.account import get_usage

get_usage(quota_type='messages')
```

API Status

IEX Cloud API Status

```
from iexfinance.account import get_api_status

get_api_status()
```

Configuration

Output Formatting

By default, `iexfinance` returns data for most endpoints in a pandas `DataFrame`.

Selecting `json` as the output format returns data formatted *exactly* as received from the IEX Endpoint. Configuring `iexfinance`'s output format can be done in two ways:

Environment Variable (Recommended)

For persistent configuration of a specified output format, use the environment variable `IEX_OUTPUT_FORMAT`. This value will be overridden by the `output_format` argument if it is passed.

macOS/Linux

Type the following command into your terminal:

```
$ export IEX_OUTPUT_FORMAT=pandas
```

Windows

See here for instructions on setting environment variables in Windows operating systems.

`output_format` Argument

Pass `output_format` as an argument to any function call:

```
from iexfinance.refdata import get_symbols

get_symbols(output_format='pandas').head()
```

or at the instantiation of a `Stock` object:

```
from iexfinance.stocks import Stock

aapl = Stock("AAPL", output_format='pandas')
aapl.get_quote().head()
```

Contact

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