

# **STOCK PORTFOLIO SUGGESTION ENGINE**

**CMPE 285: Term Project**

**Team Members:**

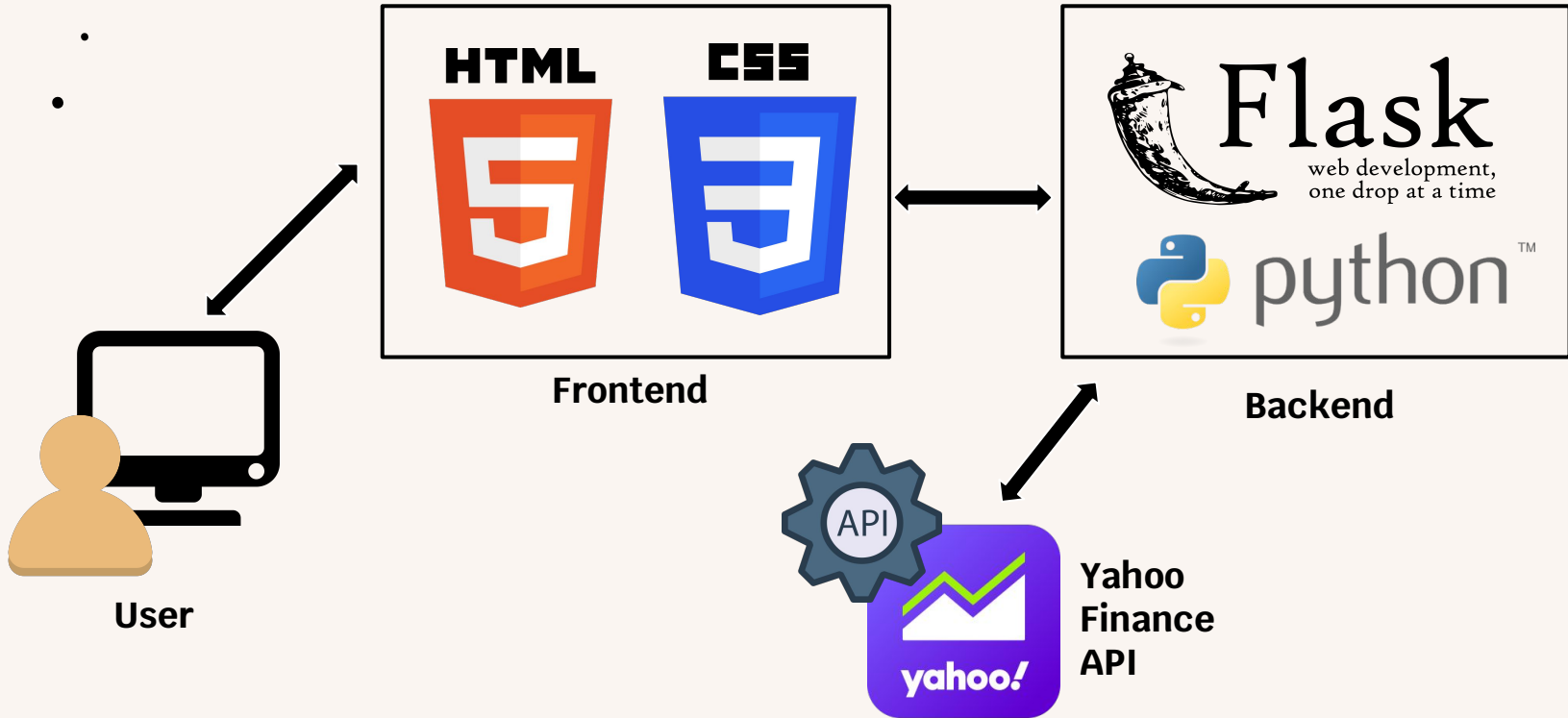
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# Architecture





# Features


- Generates curated investment portfolio based on input investment strategies and recommended percentage of distribution.
- User Can choose upto 2 investment strategies from the following:
  - Ethical Investing
  - Growth Investing
  - Index Investing
  - Quality Investing
  - Value Investing

# Features

- Real time stock values (using Yahoo Finance API) are used while generating portfolio.
- Output shows the amount allocated to each stock and a 5 day historical portfolio value.
- Input validation on investment amount and investment strategies given as input by the user.



# Challenges

- Calculation of portfolio was taking too long due to numerous API calls to yahoo finance API.
  - Understanding various types of investing strategies.
  - Understanding how the stock market works.
  - Matplotlib was creating problems while running on Flask.
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# Test Cases

- The following presentation will be a demonstration of test cases we built on our stock portfolio suggestion engine.

The background is a light beige color. It features several abstract elements: a large orange circle in the top-left corner; a cluster of shapes in the top-right corner including a small teal circle, a light pink circle, and a large orange irregular shape; a large teal and orange abstract shape on the left side with a thin black line curving around it; and a collection of small black dots and a few larger orange and black circles in the bottom-right corner.

**Thank You!**