A SHINY APP FOR FINANCIAL PLANNERS: PERSONAL FINANCE AND INVESTMENT ANALYSIS TOOLS

Abstract

This work proposes the development of a comprehensive Shiny app specifically designed to assist financial planners in their work. The app will provide a wide range of tools and functionalities to facilitate personal financial planning, investment analysis, and expense visualization.

The main focus of the app is to empower financial planners with intuitive and powerful features. It includes an investment risk profile identification module, a financial goals calculator, a backtesting analysis for simulated investment portfolios against popular benchmarks in Brazil such as CDI, Selic, Ibovespa, and IPCA.

The investment risk profile identification feature enables financial planners to better understand their clients' risk tolerance levels, allowing for more accurate asset allocation recommendations. The financial goals calculator helps in setting and tracking specific objectives, enabling planners to create tailored plans for their clients' financial success.

Furthermore, the app incorporates a section dedicated to the visualization of financial expenses and revenue, which can be uploaded from xlsx file. This feature allows financial planners to analyze and visualize the client's financial data in a user-friendly manner. The charts generated from this section can be included in reports created by the financial planners, providing a comprehensive overview of the client's financial situation.

The backtesting analysis provides financial planners with historical performance insights for simulated portfolios, aiding in the evaluation and refinement of investment strategies.

As future recommendations, we propose the inclusion of automated reporting capabilities, which would streamline the process of generating comprehensive reports for clients. Additionally, we suggest incorporating real-time portfolio monitoring functionality to provide up-to-date information on investment performance.