

HSBC fintech innovation hackathon competition

Financial investment appraisal system

Project report

| Project | Financial investment appraisal | | |
|--------------------|--------------------------------|--|--|
| name: | system | | |
| Project leader: | 李竑緯 | | |

| pro | ject name | me Financial investment appraisal system | | | | | | |
|---------------------|-------------------|--|-----|--|-------------------------------|-----|-----------------------|--------|
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二〇一九年四月

一、 project overview

In the 21st century, China is transforming from a manufacturing country to a financial one. The great changes in the financial industry have had a more profound impact on all levels of society.

Various financial products have affected everyone's life.

Securities, Banks and other financial industries are playing an increasingly important role in Chinese society, and the Internet is also developing rapidly. In this era, the amount of financial data is huge, and people's needs are urgent. The software for data statistics, analysis and application is in urgent need of development.

Our team is committed to research on how to enable investors to quickly and accurately obtain company information and data in the face of massive financial data. We use Python and three table data technology and extract information of different corporate financial statements to compare, judge and predict the operation status and development trend of enterprises, and finally form an intuitive line chart to present. The customized software is based on the actual situation of enterprises and enterprise data required by investors, thus greatly improving the scientific value of software, bringing economic benefits to enterprises and investors, and saving time cost.

二、 Market analysis

2.1 Analysis of the situation

Informatization is a major trend in the development of international business society. The core of informatization is to realize fast, effective and reliable information transmission and sharing through computer network and various application software systems, and directly through computing activities. Who can get the information faster and analyze the information correctly will get the profit. Many people are aware that China's financial industry will face a comprehensive update in the application of computer technology. At present, the securities industry alone computer technology and information services is a nearly 2 billion yuan market every year. But because of its short history, the market is immature. We believe that the next 5-10 years will be a period of steady and rapid expansion of the market. The annual sales can reach 5 billion to 6 billion yuan within 5 years and exceed 16 billion yuan within 10 years. This gives the software with a few outstanding quality and information service company, talent provided put to good use space.

2.2 Investor analysis

The majority of investors in China's securities market are individuals, with more than 37 million individuals nationwide. Most shareholders are reading newspapers, magazines and other publications, watching television programs or directly to the sales hall of the business department to understand the market. Some shareholders in the home connected to the cable television

network, through the computer can not only see the real-time market, but also through the software to view various curves and technical indicators and investment information. Their trading methods include telephone entrustment or direct transactions to the business hall.

The shareholder that capital amount achieves certain level is called large family or in door, each negotiable securities business department sets large family room, in door room to offer them to use. The number of large households in each business department is generally around 50 people. The number of large and medium-sized households in China is estimated to be about 150,000 to 200,000. Large and medium-sized households are the objects that the sales department is trying to attract. They are one of the main income sources of the sales department.

2.3 Prospect analysis

Technical analysis software accounts for about 1/3 of the current software market and is essential for every company and business department. At present, the products of the market are basically monopolized by several large companies, but there has been no great innovation in various software, which provides a new opportunity for the rising brands to divide the market. In the current software market, analysis software and information system are separated, but for investors, technical analysis and fundamental analysis are important, so providing a system that combines the two is in line with the needs of users.

三、 Team introduction

3.1 Team composition

| personnel | college | position | Duties and responsibilities |
|-----------|----------------|-----------------------------|------------------------------------|
| 李竑緯 | Software | Project manager, programmer | Managed the progress of the team, |
| | college | | decided on the software |
| | | | framework, implemented the data |
| | | | storage/retrieval operation, drew |
| | | | analysis charts according to the |
| | | | formula, and designed and |
| | | | implemented the GUI interface |
| | | | view. |
| 王锐欣 | School of | Copywriter, artist | The color and structure of the |
| | journalism and | | picture are processed by photoshop |
| | communication | | to make the software picture more |
| | | | beautiful. Organize and edit |
| | | | documents。 |
| 吴岚锋 | Software | programming personnel | Implement the GUI interface view. |
| | college | | |

| 王卓容 | School of | Copywriting and financial analysis | Financial analysis calculation and |
|-----|-------------|------------------------------------|------------------------------------|
| | materials | | simulation, part of the document. |
| | science and | | |
| | engineering | | |
| 刘博生 | mechanics | Copywriting | Analyze financial statements and |
| | institute | | extract relevant formulas. |

3.2 Team advantage

The team is composed of members from different disciplines and majors, and the team is organized according to the major. Because the majors are similar and the thinking mode is similar, it is difficult to trigger a big thinking collision when encountering problems, and it is difficult to generate innovative solutions. This is precisely the advantage of cross-disciplinary teams. In addition, with the transition of social production from the era of scarcity to the era of surplus, and the transition of production mode from the ford-type production mode of mass production of standardized products to the lean production mode of small batch production of personalized products, enterprises' desire for innovation will only increase, and the advantage of cross-specialty team will be more obvious at this time.