

# Portfolio Checker App in Power BI

Menna Fönders

A decorative white line with dots at each end, consisting of a horizontal segment on the left, a diagonal segment in the middle, and another horizontal segment on the right.

9 November 2023



# Scenario



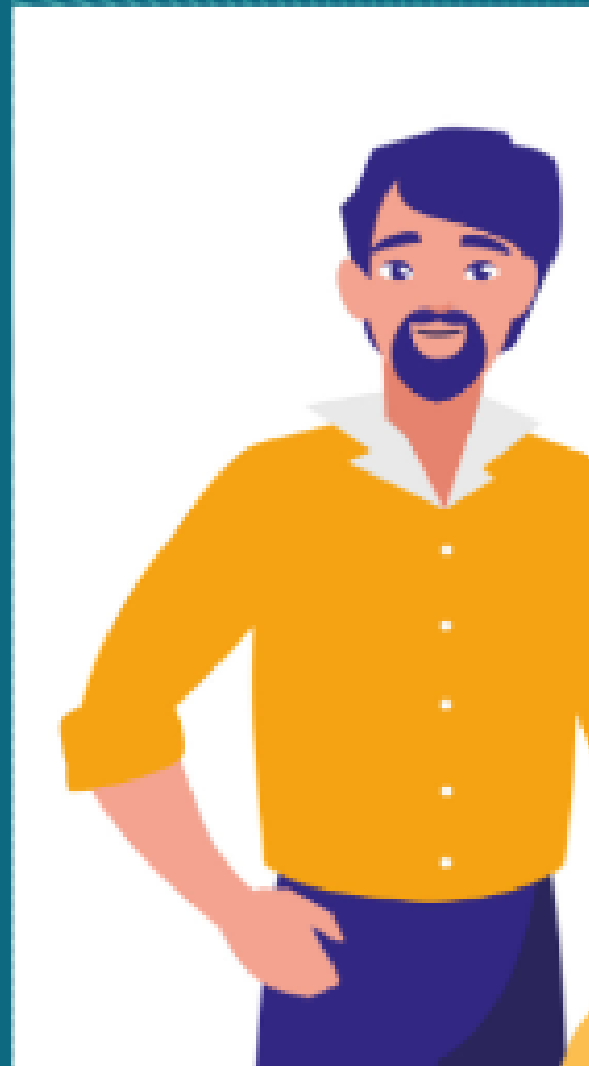
Investing Date 31.01.2022

Start Capital 300 000 \$

Target Capital 320 000 \$



# 3 Wishes



I want to see insights into each stock's performance and key indicators at a glance.

I'd love to track the performance of Mini's portfolio.

My aim is to keep up to date with the latest news on each stock.





# 2. Data & Power BI

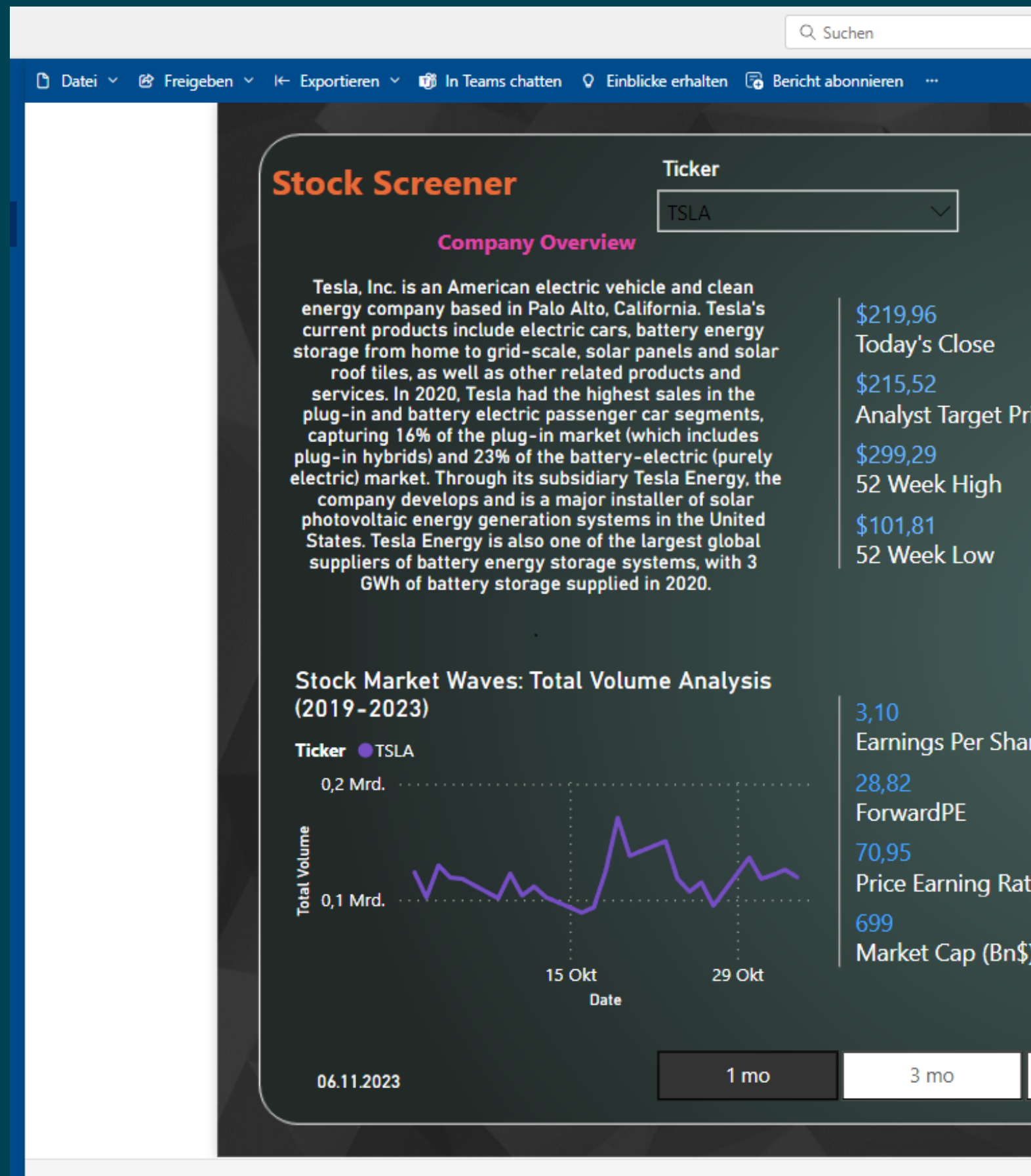
## 1. Data Collection

- Google Finance API
- Alpha Vantage API
- Yahoo Finance API



2. Implementing the ETL Method in Power BI Desktop
3. Publish dashboard to Power BI service
4. Set up a daily plan for the updating of the data set.
5. Create a Power BI Web App

Portfolio Checker  
App



# 3. APP

## Three Dashboards:

- Portfolio Checker Dashboard
- Stock Screener Dashboard
- News Checker Dashboard

# Stock Screener

Ticker  
TSLA

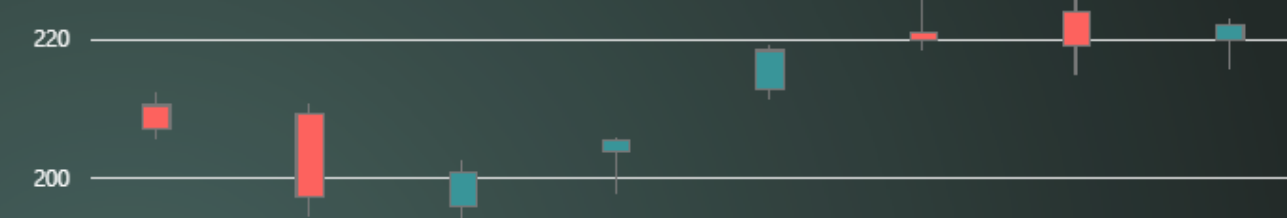
2wk4wk8wk

## Company Overview

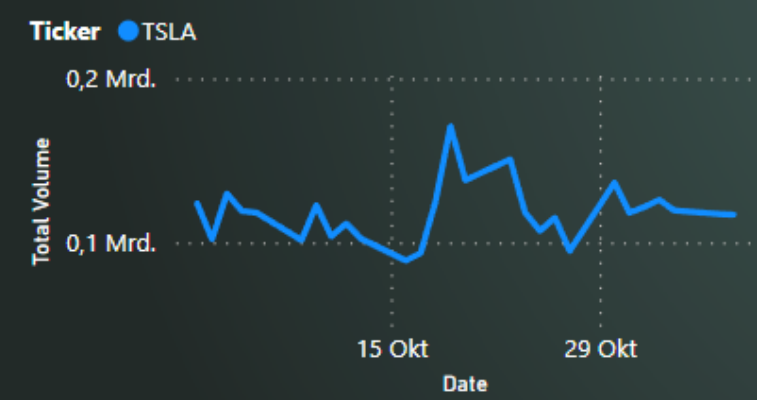
Tesla, Inc. is an American electric vehicle and clean energy company based in Palo Alto, California. Tesla's current products include electric cars, battery energy storage from home to grid-scale, solar panels and solar roof tiles, as well as other related products and services. In 2020, Tesla had the highest sales in the plug-in and battery electric passenger car segments, capturing 16% of the plug-in market (which includes plug-in hybrids) and 23% of the battery-electric (purely electric) market. Through its subsidiary Tesla Energy, the company develops and is a major installer of solar photovoltaic energy generation systems in the United States. Tesla Energy is also one of the largest global suppliers of battery energy storage systems, with 3 GWh of battery storage supplied in 2020.

\$222,18  
Today's Close  
\$215,52  
Analyst Target Price  
\$299,29  
52 Week High  
\$101,81  
52 Week Low

## Short-Term Candlestick Insights

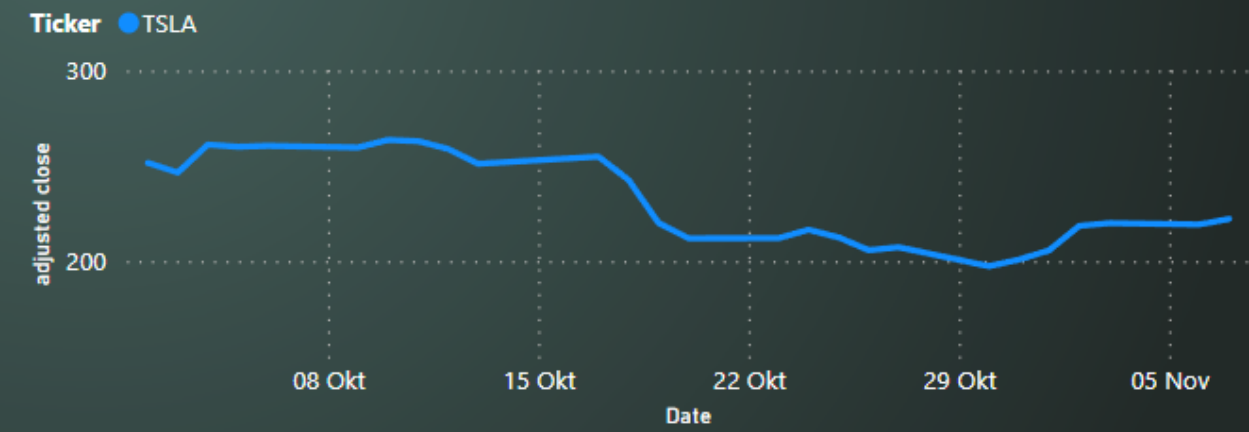


## Stock Market Waves: Total Volume Analysis (2019-2023)



3,09  
Earnings Per Shar...  
28,82  
ForwardPE  
71,90  
Price Earning Ratio  
706  
Market Cap (Bn\$)

## Economic Ups and Downs: Stock Performance Trends 2019-2023



08.11.20231 mo3 mo6 mo12 mo5 yr



Portfolio Checker

Stock Screener

Portfolio Checker

News Checker

Portfolio Checker

Ticker

Alle

09.08.2022

07.11.2023

297,54 Tsd.

Current Portfolio Value

-21,11 Tsd.

Position (Gain/Loss)

Stock Name	Ticker	No of Shares	Buy Price	Buy Date	Portfolio Cost	Current Price	Portfolio Value	Position (Gain/Loss)
AMAZON.COM, INC.	AMZN	1000	149,57	31.01.2022	149.570,00	140,60	140.600,00	-8970,00
MICROSOFT CORPORATION	MSFT	200	310,98	31.01.2022	62.196,00	360,69	72.138,00	9942,00
Tesla, Inc	TSLA	100	312,24	31.01.2022	31.224,00	209,98	20.998,00	-10226,00
ALPHABET INC.	GOOG	200	135,70	31.01.2022	27.140,00	131,69	26.338,00	-802,00
APPLE INC.	AAPL	100	174,78	31.01.2022	17.478,00	182,41	18.241,00	763,00
The Walt Disney Company	DIS	100	142,97	31.01.2022	14.297,00	90,34	9.034,00	-5263,00
PayPal Holdings, Inc	PYPL	50	171,94	31.01.2022	8.597,00	54,28	2.714,00	-5883,00
McDonald's Corporation	MCD	20	259,45	31.01.2022	5.189,00	266,91	5.338,20	149,20

Portfolio Value by Ticker

5,34 Tsd. (1,79%)

21 Tsd. (7,06%)

14... (4...)

72,14 ... (24,2...)

Ticker

AMZN

MSFT

GOOG

TSLA

AAPL

Price Earning Ratio by Ticker

Stock Name

ALPHABET I...

AMAZO...

APPLE INC.

McDonal...

Summe von P/E

AMZN

DIS

TSLA

MSFT

NKE

AAPL

GOOG

MCD

PYPL

16,79

Top Performer MSFT

-67,97

Worst Performer PYPL

Portfolio Performance

Ticker

AAPL

AMZN

DIS

GOOG

MCD

MSFT

NKE

PYPL

TSLA

Summe v...

Jan 2023

Jul 2023

Target Portfolio Value

320 Tsd.

297,54 Tsd.

0,00 Tsd.

595,08 Tsd.

Return on Investment (%)

Stock Name

ALPHABE...

AMAZO...

APPLE INC.

McDonal...

MICROS...

NIKE, Inc

PayPal H...

Tesla, Inc

The Walt ...

Summe von ROI

MSFT

AAPL

MCD

GOOG

AMZN

NKE

TSLA

DIS

PYPL

Zurück

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Portfolio Checker

Stock Screener

Portfolio Checker

News Checker

## News Checker

Ticker

DIS

## Top new article

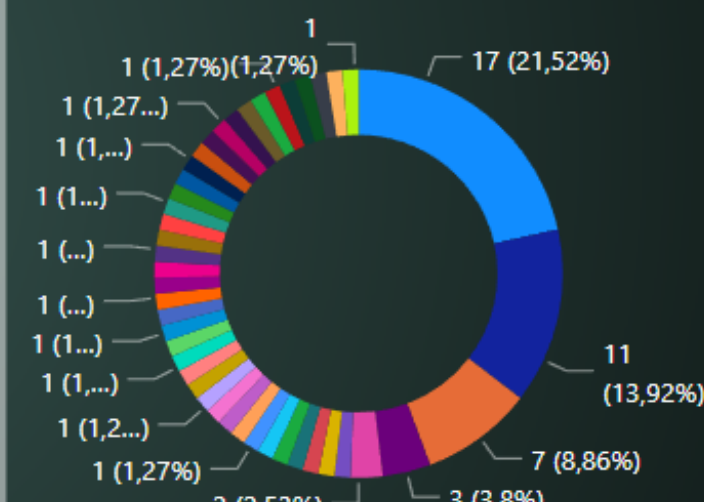


	Publish Date	Lin
Walt Disney Co (DIS)'s Value: Is It Really Priced Right ... - GuruFocus.com	09.11.2023	🔗
Analyzing Market News- \$DIS, \$AFRM, \$MODG, and ... - TheStreet	09.11.2023	🔗
Option Activity: DIS, TTWO, MU - Nasdaq	09.11.2023	🔗
Update for 11/09/2023: DIS, DNUT, WWW - Nasdaq	09.11.2023	🔗
Earnings Beat Estimates, Revenues Rise Y/Y - Yahoo Finance	09.11.2023	🔗
Stock Forecast and Price Prediction - USA TODAY	09.11.2023	🔗
την ανοδική της πορεία με ισχυρά οικονομικά ... - emea.gr	09.11.2023	🔗
CO, DIS - Nasdaq	09.11.2023	🔗
ale à Vallauris: "Je dis que vous êtes un menteur ... - Nice matin	09.11.2023	🔗
act to SAG-AFTRA Tentative Deal - Schaeffers Research	09.11.2023	🔗
akan diheret ke mahkamah jenayah, suara Malaysia didengar di Madrid 11 Dis - Azalina - Astro Awani	09.11.2023	🔗
季盈利超预期、擴大成本削減規模Disney+訂戶增加 ... - Hong Kong Economic Times	09.11.2023	🔗
al Report for DIS - Martin Zweig - Nasdaq	09.11.2023	🔗
daai brief' kom hom duur te staan - Maroela Media	09.11.2023	🔗
L: compatibilità con il Lavoro Occasionale in Agricoltura - Lavoro e Diritti	09.11.2023	🔗
DIETA PERFETTA? Dis-informazione, fake news ... - Policlinico di Milano	09.11.2023	🔗
ストーリーミング事業改善を突破口に株価反発へ ... - sbisec.co.jp	09.11.2023	🔗
DIS : L'action Walt Disney amorce un retournement ... - IG	09.11.2023	🔗
streaming transition will allow Disney to 'strengthen our hand' - Yahoo Finance	09.11.2023	🔗
Active for Nov 8, 2023 : RIG, EQRX, DIS, SABR ... - Nasdaq	08.11.2023	🔗
cost-cutting plan by \$2 billion, posts better-than-expected profit - CNBC	08.11.2023	🔗
ings: A Trader's View - Nasdaq	08.11.2023	🔗

## Where the news comes from

## News Source

- Nasdaq
- Yahoo Finance
- TipRanks
- CNBC
- Centrum Wiskund...
- Alexandria Echo Pr...
- Astro Awani
- Axios
- Bizcommunity.com
- Columbia Missouri...
- Cornell University ...
- DAWN.com
- Dottrina Per il Lavo...
- Echonetdaily
- emea.gr
- GuruFocus.com
- Her Campus
- Hong Kong Econo...
- iAfrica.com
- IG





## 5.Recommendation & Conclusion



Warren Buffet

“The stock  
market is  
designed to  
transfer money  
from the Active  
to the Patient.”

1

Enabling user input via the implementation of Power Apps.

2

Power BI is a very powerful and versatile tool.

Thank you  
for  
listening!!

