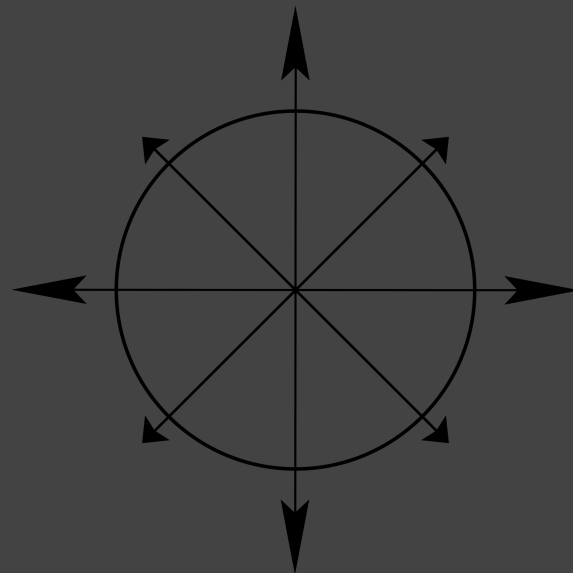# Palithius

## Asset Analysis & Portfolio Builder

Mikael Magnusson

2024-03-15

# The Valerian Model

A little trip down memory lane...

- ## January 2018
  "Garageband" fund Valeria First Capital is created

- ## Late Summer 2019
  Portfolio Optimization model is created in Google Sheets

- ## 2020 - 2021
  Valeria Outperforms 90% of Nordnet portfolios

- ## Fall 2021
  Disbanded, having doubled index returns

# Far from perfect...

- No basis for fundamental analysis

- Weights had to be manually inputted

- 10 assets... No more, no less...

- Time Horizon = 1 year, no more, no less

- Weekly data only made 52 rows

- Technically unreliable

# Palithius Asset Manager

- ## Overview of fundamentals
  Allows for general analysis with Data Visualization
  From description to valuation (with macro flags!)

- ## Better data
  Data is daily with customizable time horizon

- ## Portfolio Builder & Optimizer
  Data Visualization & Statistics with one button

- ## No portfolio limit
  Add as many or as few assets you want

- ## All in a easy to use package

# Demo Time

And unfortunately... The app is in Swedish

# Palithius Asset Manager

- Built in Streamlit library

- Fundamental Data from Börsdata API

- Price Data from Yahoo Finance

- Portfolio Builder with skfolio
  ML library built on sklearn

- Data Visualisations
  With Matplotlib & Seaborn

BÖRSDATA

yahoo!
finance