



Portfolio Rebalancing

Pune Vidyarthi Griha's College of Engineering and Technology, Pune

Team Members:

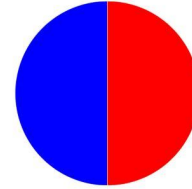
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5. Prashant Bhandari
6. Vinod Kamat



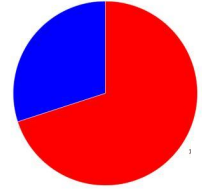
Problem Statement & Solution

- Portfolio rebalancing for Mutual Funds
- Rebalancing - what and why?
- Adwait invests equally in two funds A and B.
A is a high-risk high-return fund.
B is a low-risk low-return fund.
After 1 year, what should he do?

Adwait's Portfolio



Now

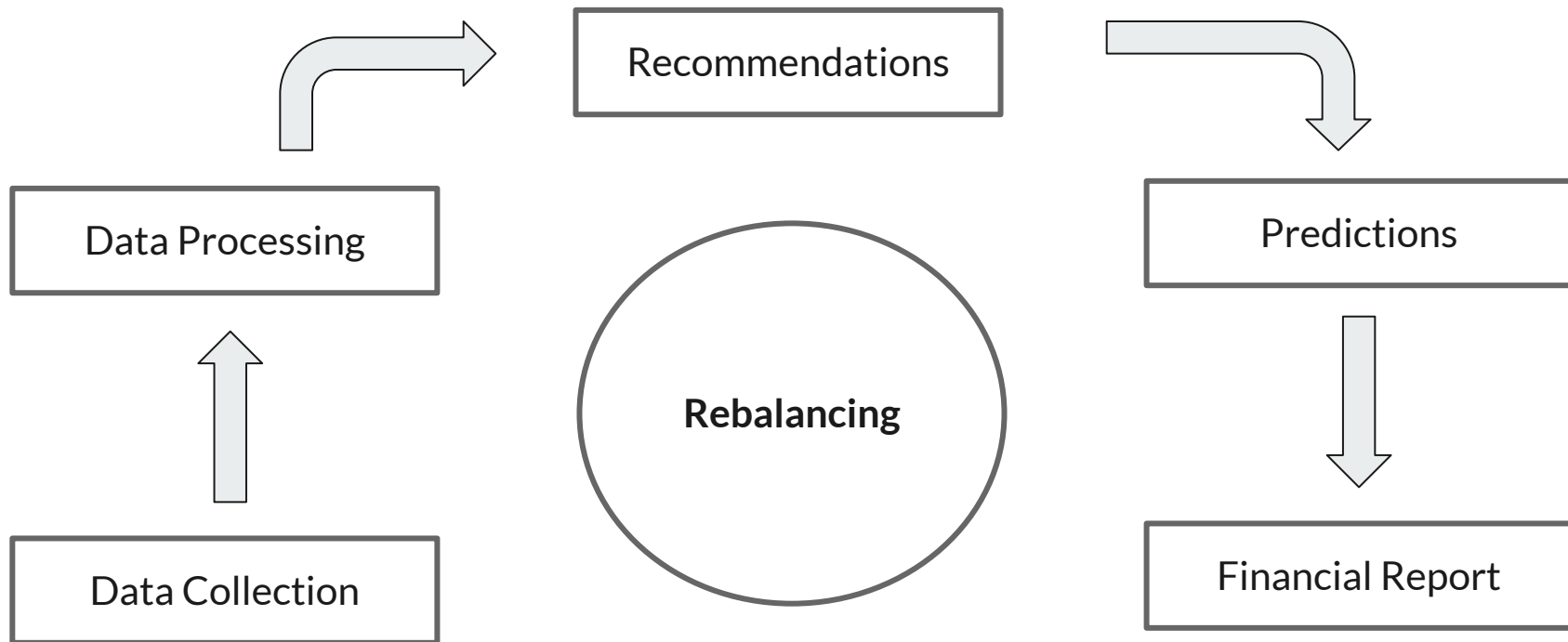


1 year later

- Rebalancing is a secret no one talks about. It is an asset allocation strategy in which we review our assets to remain consistent with our desired allocation.

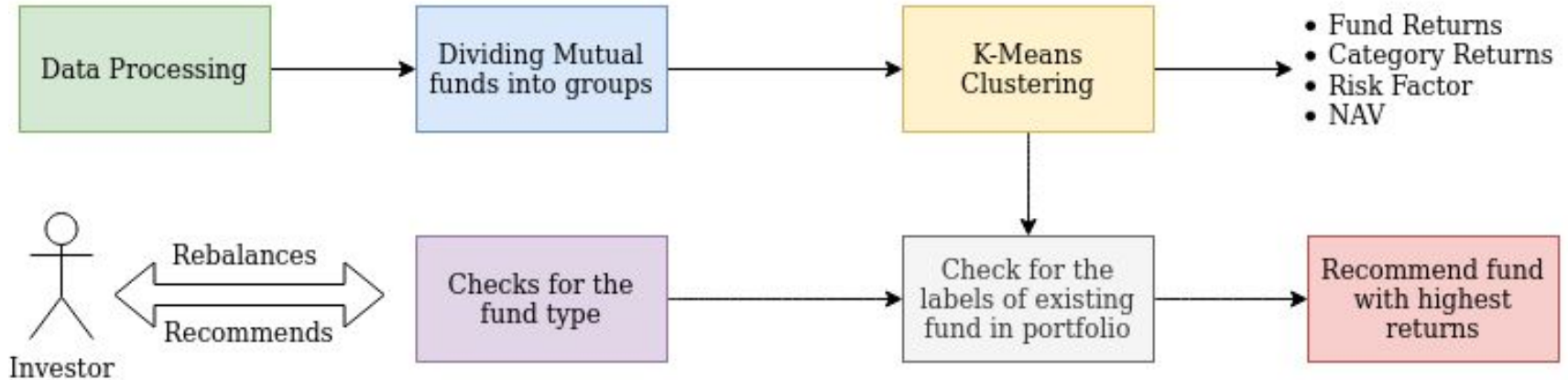


Approach





Recommendation Engine

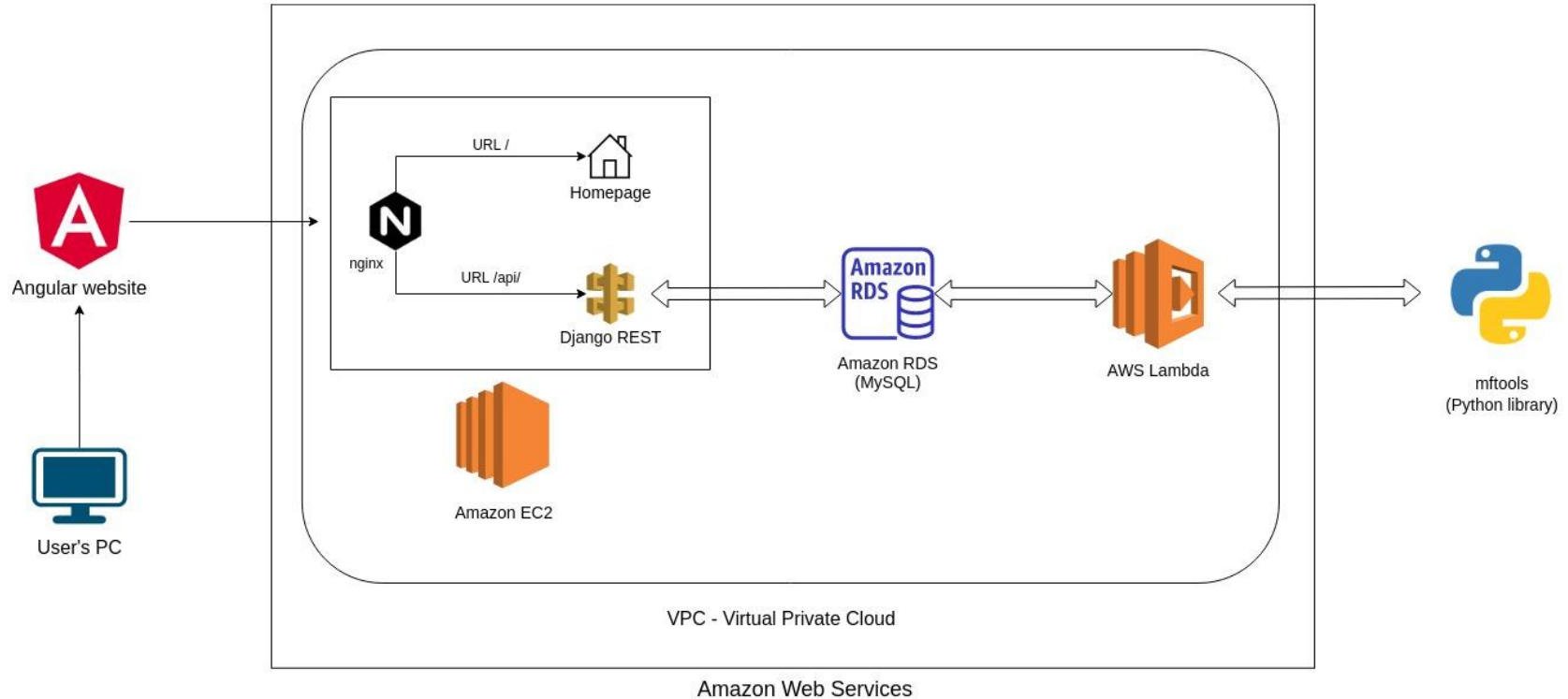




DEMO



Architecture & Design





Security

- Token Authentication
 - Secure token with HTTP header
 - Expires after 6 hours of inactivity
 - Tokens are encrypted with SSL
 - User's passwords are hashed in database
- VPC in AWS
 - Database is shielded from from all outside traffic



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Benefits

- Recommendation Engine
- Financial Report Generation
- RESTful Service
- Cloud Ready



Future Work

- Collecting and analyzing more data
- Expanding scope of project
 - SIP
 - Stocks
 - Global Market



image

Value Propositions

- DTC Model - Required to manage funds
- B2B - Reduces efforts and automates the process
- Principal International Business Users



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Experiences, Learnings and Challenges

- Exploring the Financial world and its intricacies
- Working with AWS and Angular
- Glimpse of Corporate culture
- Virtual Collaboration
- And of course errors!



Questions?