

FinTech Unit 4 Homework: Grading Rubric						
Criteria	Ratings				Points	Feedback
Data Preparation	20 Points Mastery <ul style="list-style-type: none">Completed 5 out of 5 requirementsCode runs without error and produces the assigned resultsCode accounts for all possible scenarioCode is free of bugs	19 > 15 Points Approaching Mastery <ul style="list-style-type: none">Completed 5 out of 5 of requirementsCode runs without errorCode produces results as expected 80% or more of the time	15 > 14 Points Progressing <ul style="list-style-type: none">Completed 2 out of 5 requirementsCode runs without errorCode produces results, but not necessarily the correct results	14 > 0 Emerging <ul style="list-style-type: none">Completed 1 or none out of the 5 requirementsNo submissionCode runs with error	0	
Requirements <ul style="list-style-type: none">Pandas is used to read each CSV file as a DataFrameNull values have been detected and removedNumeric values have been formatted and data types convertedS&P 500 closing prices have been converted to daily returnsWhale Returns, Algorithmic Returns, and the S&P 500 Returns are joined into a single DataFrame with columns for each portfolio's returns						
Quantitative Analysis	20 Points Mastery <ul style="list-style-type: none">Completed 8 out of 8 requirementsCode runs without error and produces the assigned resultsCode accounts for all possible scenarioCode is free of bugs	19 > 15 Points Approaching Mastery <ul style="list-style-type: none">Completed 8 out of 8 requirementsCode runs without errorCode produces results as expected 80% or more of the time	15 > 14 Points Progressing <ul style="list-style-type: none">Completed 3 out of 8 requirementsCode runs without errorCode produces results, but not necessarily the correct results	14 > 0 Emerging <ul style="list-style-type: none">Completed 2 or fewer out of the 8 requirementsNo submissionCode runs with error	0	
Performance Analysis Requirements <ul style="list-style-type: none">Cumulative returns for each portfolio calculated and plotted.Compares each portfolio's returns to the S&P 500						
Risk Analysis Requirements <ul style="list-style-type: none">Box plot for each of the returns created, with largest and smallest spread identifiedStandard deviation is calculated for each portfolio, identify risk in comparison to S&P 500						
Rolling Statistics Requirements <ul style="list-style-type: none">Rolling standard deviation of each portfolio is plotted against rolling standard deviation of S&P 500Risk of each portfolio is identified compared to S&P 500 risk<ul style="list-style-type: none">Correlation table for the algorithmic, whale and S&P 500 returns is includedRolling beta of portfolios plotted against rolling beta of S&P 500						
Sharpe Ratios	15 Points Mastery <ul style="list-style-type: none">Completed 3 out of 3 requirementsCode Runs without error and produces the assigned resultsCode accounts for all possible scenarioCode is free of bugs	14 > 10 Points Approaching Mastery <ul style="list-style-type: none">Completed 2 out of 3 requirementsCode runs without errorCode produces results as expected 80% or more of the time	10 > 9 Points Progressing <ul style="list-style-type: none">Completed 1 out of 3 requirementsCode runs without errorCode produces results, but not necessarily the correct results	9 > 0 Emerging <ul style="list-style-type: none">Completed none or partial out of the 3 requirementsNo submissionCode runs with error	0	
Requirements <ul style="list-style-type: none">Daily returns are used to calculate Sharpe RatioSharpe ratios are visualized using a bar plotDetermines whether the algorithmic strategies outperform the whales or the S&P 500						
Custom Portfolio	15 Points Mastery <ul style="list-style-type: none">Completed 3 out of 3 requirementsCode Runs without error and produces the assigned resultsCode accounts for all possible scenarioCode is free of bugs	14 > 10 Points Approaching Mastery <ul style="list-style-type: none">Completed 2 out of 3 requirementsCode runs without errorCode produces results as expected 80% or more of the time	10 > 9 Points Progressing <ul style="list-style-type: none">Completed 1 out of 3 requirementsCode runs without errorCode produces results, but not necessarily the correct results	9 > 0 Emerging <ul style="list-style-type: none">Completed none or partial out of the 3 requirementsNo submissionCode runs with error	0	
Requirements <ul style="list-style-type: none">Simple Finance function is used to choose portfolioData downloaded as CSV files and portfolio returns calculatedPortfolio returns added to the DataFrame with the other portfolios analyzed and compared						
Coding Conventions/Formatting	10 Points Mastery <ul style="list-style-type: none">Imports are at the top of the file, just after any module comments and docstrings, and before module globals and constantsFunction names are lowercases, with words separated by underscoresVariable names follow the same convention as function namesCode follows (DRY) principals, no repetition, maintainable and highly reusable code.	9 Points Approaching Mastery <ul style="list-style-type: none">Variable names are specific and descriptive of the informationImports are within the top of file	8 Points Progressing <ul style="list-style-type: none">Code lacks proper indentation and length convention<ul style="list-style-type: none">Limit all lines to a maximum of 79 characters.Variable names are generic and not descriptive of the information held by the variableImports and files are located in a non-standard location	8 > 0 Emerging <ul style="list-style-type: none">Code is excessively lengthyVariable names are missing or lacking any descriptive informationImport and files are not loaded	0	
Deployment/Submission	10 Points Mastery <ul style="list-style-type: none">Repository cloned to local machineFiles added to the repo via the command lineAppropriate commit messages	9 Points Approaching Mastery <ul style="list-style-type: none">Repository cloned to local machineFiles added to repo via the command line	8 Points Progressing <ul style="list-style-type: none">Repository created on GitHubFiles added manually on GitHub	8 > 0 Emerging <ul style="list-style-type: none">No SubmissionSubmission via incorrect format	0	
Documentation/Comments	10 Points Mastery <ul style="list-style-type: none">Code is well commented with concise, relevant notes	9 Points Approaching Mastery <ul style="list-style-type: none">Code is commented and mostly understandable to an outside user	8 Points Progressing <ul style="list-style-type: none">Code has comments, but they are not understandable to an outside user	8 > 0 Emerging <ul style="list-style-type: none">Code is not commented	0	
TOTAL POINTS 0					LETTER GRADE F	