**Meeting Minutes – Captone Project – Stock Forecast**

**Location:** Zoom meeting

**Date:** October 6, 2023

**Time:** 12.30 pm to 1.30 pm

**Attendance:**

* Yew-Wei Lim
* Albert Wong
* Diana Ortiz
* Andrés Viloria

**Discussion:**

* The specific time and date of the next meeting were confirmed to be next Friday at noon.
* The progress of the project plan was presented, the metrics comparison. It was showed that all the values have been filled out for each stock.
* There was a request for additional guidance and clarification on expectations, specifically regarding the expansion of stocks. Albert mentioned that for the capstone project, expanding the stock may be considered, but the priority lies in completing the paper with the current work accomplished and inclusion of additional information such as how to tune the models.
* Concerns were raised about the data quality of the demographics. Albert pointed out that the demographics don't significantly impact the prediction, so prioritizing the inclusion of more accurate demographics is not necessary at this stage.
* The aim of writing a detailed paper and the suggestion to focus on understanding the process well to document it was discussed as the priority for this stage of the project (capstone project).
* The access of Mendeley for the article was discussed. The students do not have access to it yet.
* It was advised to wait for further instructions from Albert for the next week regarding the paper and focus on understanding the process in the meantime. Until the next week, the team will complete the metric comparison of the whole portfolio and work on the documentation of the current work that might be included in the paper.



**Action Items:**

* Fill out the metrics comparison for whole the portfolio in which the metrics of the portfolio is the average of all stocks.
* Send metrics comparison to Albert and Yew once it is completely filled out.
* Yew-Wei will review the skeleton he has access to on Mendeley and will update to us if there is any important information that we might need to be aware of for our project.
* Clarify tasks and expectations for the next six weeks with Albert during the upcoming meeting (Friday).
* Tunning the models might be expected to be included in the project.
* Write a more detailed report (technical sections in a greater detail) on the project's progress and process by understanding the current state.
* The scope statement will be updated based on the today’s meeting.
* The template used for the scope statement needs to be corrected, as the instructor was not updated accurately. (done)
* The team were encouraged to reach out to Albert for any clarifications or adjustments needed regarding the project's timeline and specific milestones.