

IPO ANALYSER

Instruction manual

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1 How to open the tool

To open the tool, please open the folder "IPO Analyser". In there, you will see two folders, "frontend" and "backend". A user should never have to open the backend folder. To continue to the tool, please open the "frontend" folder.



Figure 1: The IPO Analyser file folder, please open the "frontend" folder

In the frontend folder, you will see a file, IPO-ANALYSER.HTML, and a folder. To open the tool, please double click on the HTML file. This will run the tool and following this you can close the folder.

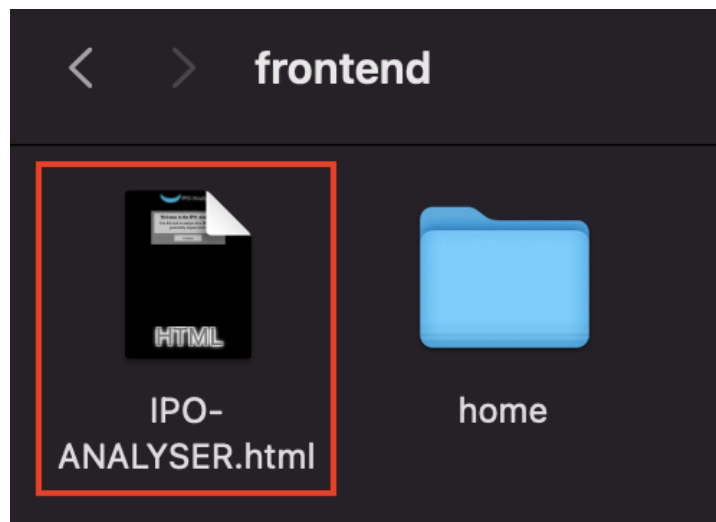


Figure 2: The frontend folder. To start the tool, open the .HTML file

2 Starting page



Figure 3: The menu page

On the starting page there are two buttons, the help button and the continue button. The help button is located in the upper right corner. Clicking it will navigate to the help page. The continue button is located in the middle of the screen. Clicking it will navigate to the input page.

3 Help page

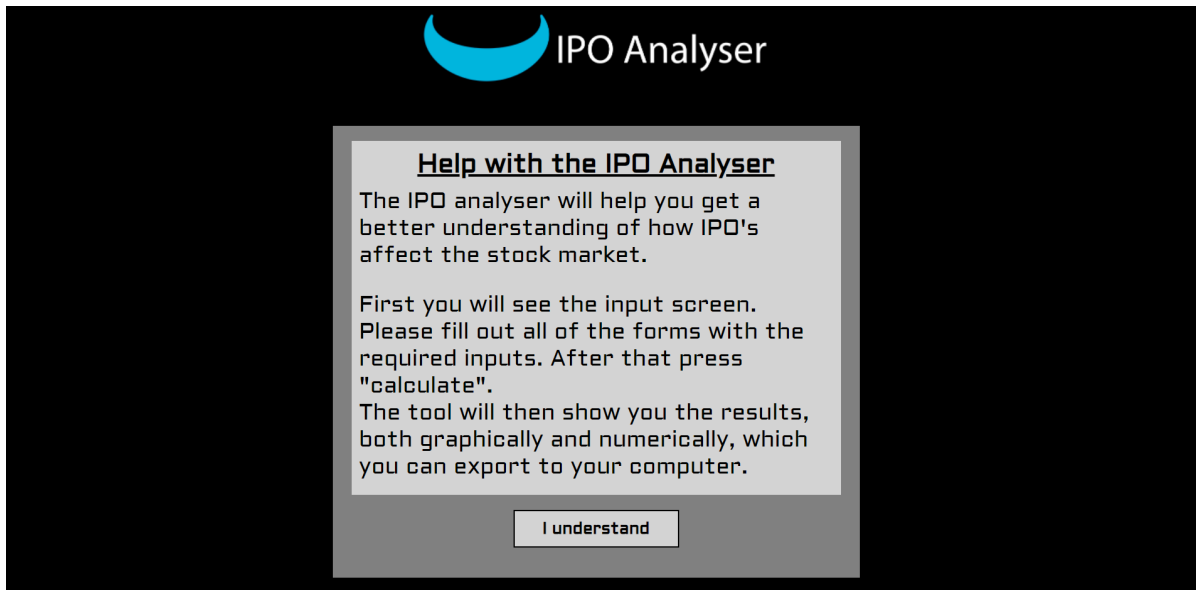


Figure 4: The help page

The help page is for information only. The I understand button is the only button on this page and is located in the middle of the page. It navigates to the starting page.

4 Input page

IPO Analyser

Data - Input

Select a data set* Upload (optional)

IPO timeframe filter:

From: dd/mm/yyyy

To: dd/mm/yyyy

IPO launch time*:

Start date: dd/mm/yyyy

Future launch:

Historical IPO launches (select at least 1)

Show	Name	Date	Open	Close
<input type="checkbox"/>	LMND	02/07/2020	\$50	\$69.41
<input type="checkbox"/>	U	21/09/2020	\$75	\$68.35
<input type="checkbox"/>	EAF	19/04/2018	\$14.75	\$12.97
<input type="checkbox"/>	FOCS	26/07/2018	\$35.9	\$37.55
<input type="checkbox"/>	GTES	01/25/2018	\$19.05	\$18.5
<input type="checkbox"/>	DBX	23/03/2018	\$29	\$28.48
<input type="checkbox"/>	NIO	12/09/2018	\$6	\$6.6

CALCULATE

Figure 5: The input page

The input page is where all input is selected for the program. Mandatory inputs are marked with a * symbol.

4.1 Select a data set - Mandatory

This button is a drop down selection button. It has multiple stocks that can be selected as an portfolio. All calculations will include values from this portfolio.

4.2 Upload - Optional

This button is a upload button that allows you to select a file from your computer and upload it as a custom portfolio. *This button is currently not fully functional.*

4.3 IPO timeframe filter - Optional

The From and To button are date buttons that filter the available IPOs on the right side of the screen. The user can either enter in the date manually or use the drop down date selection, if the date icon is clicked.

4.4 IPO launch time - Mandatory

The Start date and Future launch buttons are date buttons that select the timeframe for the calculations. The user can either enter in the date manually or use the drop down date selection, if the date icon is clicked. The input of the start date button will be the first date of the timeframe in the output page. The start date needs to be earlier any of the selected IPOs launch dates and the future launch must be in the future.

The selected start date may not be exactly the same as the programs first date since there is only financial data for working days.

4.5 Historical IPO launches (select at least 1) - Mandatory

The table located on the right side of the screen is where IPOs can be selected. To select an IPO the white box under "Show" must be selected. The program requires at least one IPO to function but there is no upper limit. To see all available ipos the slide bar on the far right side can be used.

4.6 IPO Analyser - Home button

If the logo at the top is clicked the program will navigate to the starting page.

5 Output page

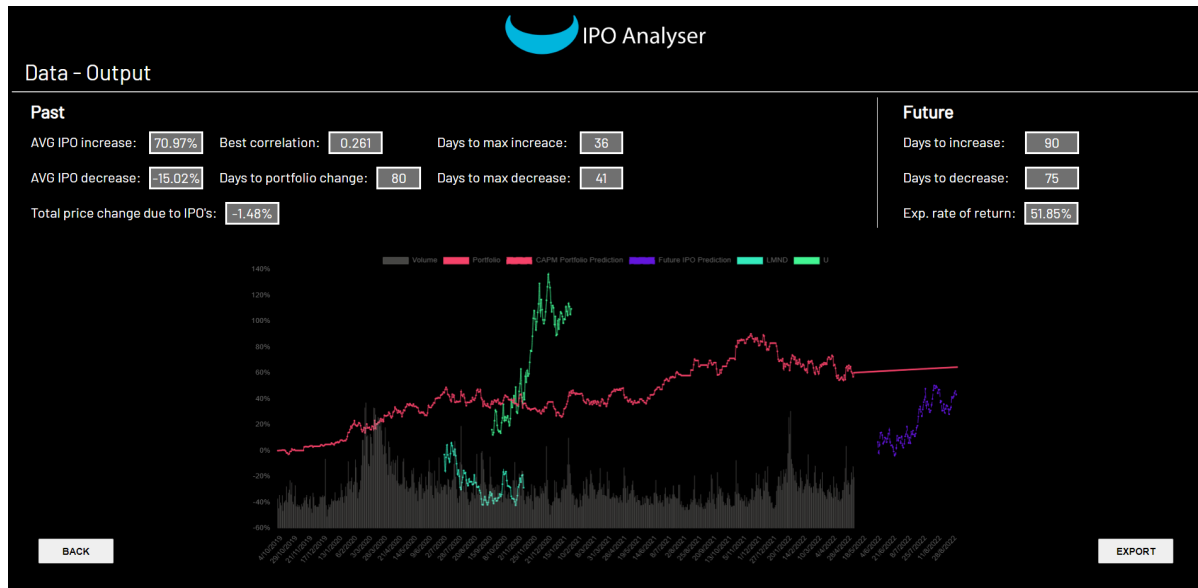


Figure 6: The output page

5.1 Past

In the past section you will find all the output data that was calculated for the historical IPOs and the data set.

5.1.1 AVG IPO increase

This is the average increase of the IPOs that was calculated with the historical IPO data.

5.1.2 Best correlation

This is the calculated correlation between the IPOs and the filtered dataset.

5.1.3 Days to max increase

This is the average time increase to the highest average rate of return in days.

5.1.4 AVG IPO decrease

This is the average decrease of the IPOs that was calculated with the historical IPO data.

5.1.5 Days to portfolio change

This is the time estimation to the time change of the portfolio in the future.

5.1.6 Days to max decrease

This is the average time increase to the lowest average rate of return in days.

5.1.7 Total price change due to IPOs

This is the total price change due to the launches of the selected IPOs.

5.2 Future

In the future section you will find the calculated data for possible changes in the future.

5.2.1 Days to increase

Here we estimate the days to the final increase in a future IPOs launch.

5.2.2 Days to decrease

Here we estimate the days to the final decrease in a future IPOs launch.

5.2.3 Exp. rate of return

This is the total expected rate of return calculated from the historical IPOs and future IPOs in mind.

5.3 The graph

5.3.1 Volume

The grey bars behind the lines are the volume of each transaction of the portfolio. Hovering over them will show the exact amount.

5.3.2 Portfolio

The red line is the portfolio, the values are filtered using the SP500 to only show meaningful changes in the portfolio. The straight red line at the end is the predicted future of that portfolio using CAPM.

5.4 Future IPO

The purple IPO in the future is the calculated output based on all previous IPOs.

5.5 IPOs

In random colors the IPOs will appear on the graph.

5.6 Other options

Hovering over each date point will show the value of that point. Clicking the colored bars at the top of the graph will hide or unhide the data that the color represents.