

Data Visualization and Communication Final Project Report

Project Name:

Portfolio 2.0

Project Participants:

Alex Nocella

Mehdi Saedi

Shuang Chan

Project URL:

The site is hosted on three servers:

<http://ec2-54-197-22-156.compute-1.amazonaws.com:5000/index.html>

<http://198.11.202.186:5000/index.html>

<http://50.97.249.12:5000/index.html>

And the code is on github:

<https://github.com/shuangchan/portfolio20>

Who did what:

Task	Alex	Mehdi	Shuang
Data Retrieval	90%	10%	
Website Design	10%	10%	80%
Coding – Python	30%	50%	20%
Coding – HTML	25%	25%	50%
Coding – Javascript	40%	40%	20%
Coding - MATLAB	10%	80%	10%
Usability Testing	30%	30%	40%
Final Presentation	33%	33%	33%

Additional Notes:

We reacted to the feedback from our final presentation by adding space between the columns on the Portfolio Optimizer page so they are more distinct.

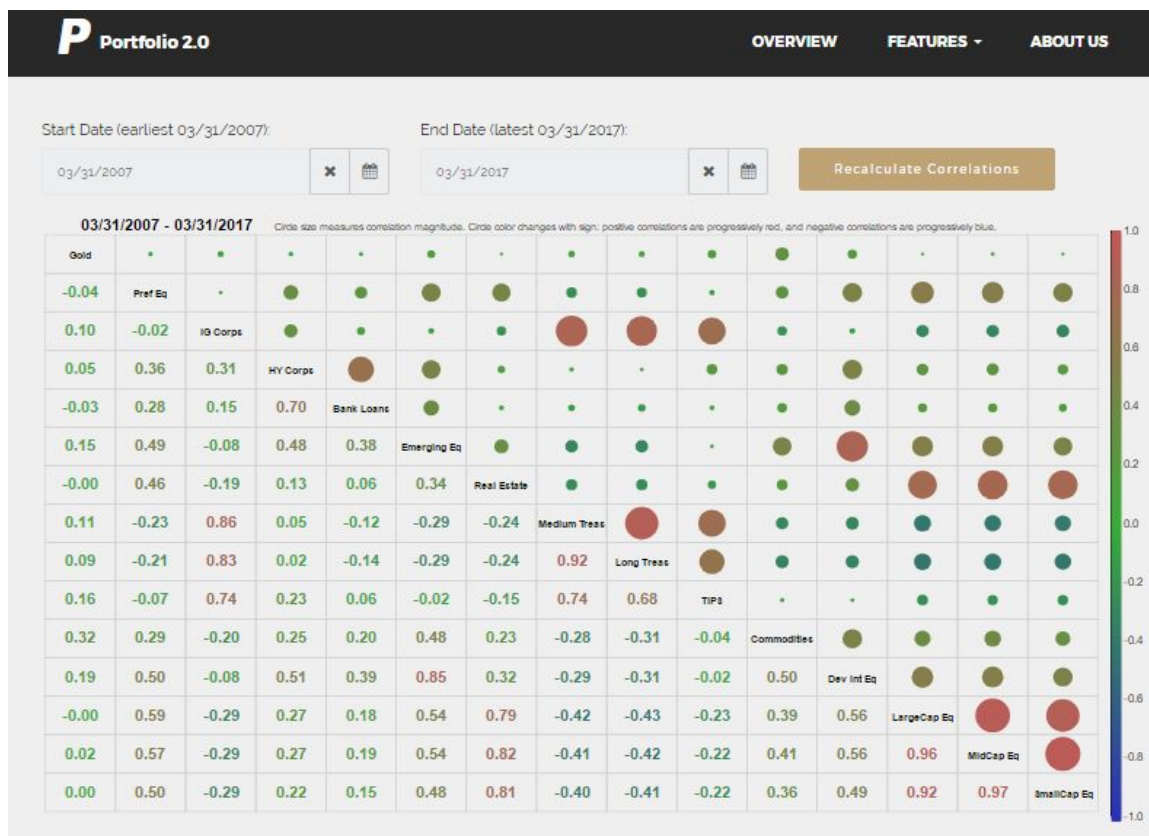
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Portfolio 2.0

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Portfolio Optimizer

Asset	Allocation(%)	Asset	Allocation(%)	Asset	Allocation(%)
Total Allocation:		Historical Return:	10 Years	Optimize	


We changed the color scale on the Asset Correlation page to reduce the saturation and we modified the lightness.




Our goals, data source, and contact info are contained in the “About Us” page.

 **Portfolio 2.0**


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Team Members



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Visualization Goals

- Present asset correlations as an input to portfolio construction
- Optimize portfolios based on historical returns for varying time periods
- Compare portfolio performance for various custom, predefined, and optimized portfolios

Targeted Audience

Individual Investors

- Compare different portfolios and pick the best based on their selection criteria
- Optimize their current portfolio by finding the best asset allocation

Investment Advisors

- Use tools to explain portfolio management concepts to clients
- Find the best asset mix based on clients' needs

Data Source

All asset class returns were exported from [S&P Dow Jones Indices](#). Cash returns are the 3-month LIBOR rate and are available from the [Federal Reserve Bank of St. Louis](#).

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