



Portfolio Rebalancing

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Rationale

- Empowers individual investors to evaluate and practice their own ideas.
- Evaluate strategies using random portfolios and historical data and market signals.
- Recommend changes to portfolio on the basis of strategies
- Execute buy/sell/hold recommendations.
- Compare different strategies

Portfolio Rebalancing in action...

- Portfolio balancing strategy analysis requires sophisticated tools, historical data(structured and unstructured), etc.
- Evaluate your strategy using random portfolio or your own portfolio.
- Dry run your portfolio strategy before taking it to market.
- Get buy/sell/hold recommendations for rebalancing portfolio.
- Add new signals/feeds to strategy evaluator
- Rebalance your portfolio with automated execution recommendations.

Demo...

- ◊ Using strategy of getting rid of bottom 10 percent every month based on average psych signals.
- ◊ Using randomly generated portfolios from valid US stocks.
- ◊ First part of demo is Execution of the strategy
- ◊ Analysis of this strategy and comparison with buy and hold strategy over the last year.

APIs Used

- ◊ Markit
- ◊ PsychSignal
- ◊ Tradier
- ◊ Bloomberg
- ◊ Yahoo Finance