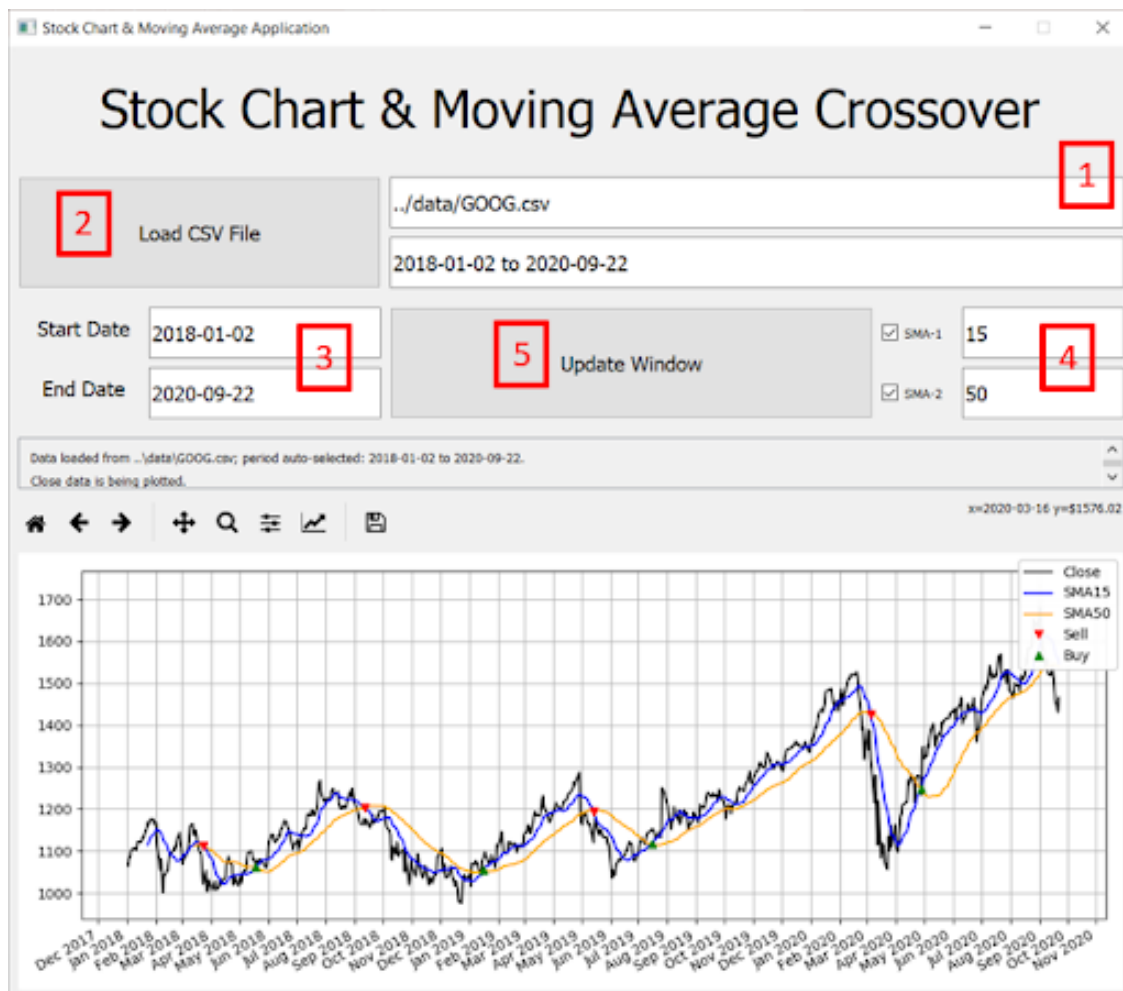


Python Programming and Its Applications in Stock Chart & Moving Average (MA) Crossover

November 17, 2020

1 User Manual

1.1 Running the Application from .exe (Windows Only)



5 Steps of running the application from .exe file (found in dist folder):

(Recommended for Users who just want to know how to run and use the application)

0. Go to `dist` folder, double click the `app.exe`
1. Input the location of the stock data file here. In this case we have a relative path that directs to the `data` folder in `StockChartApplication`, where our sample data file, `GOOG.csv` is located. (`.` means the current folder where `app.exe` is located, `..` means the parent folder (one folder up) from where `app.exe` is located)

Alternative: an absolute path can also be inputted using the exact directory address of the file.

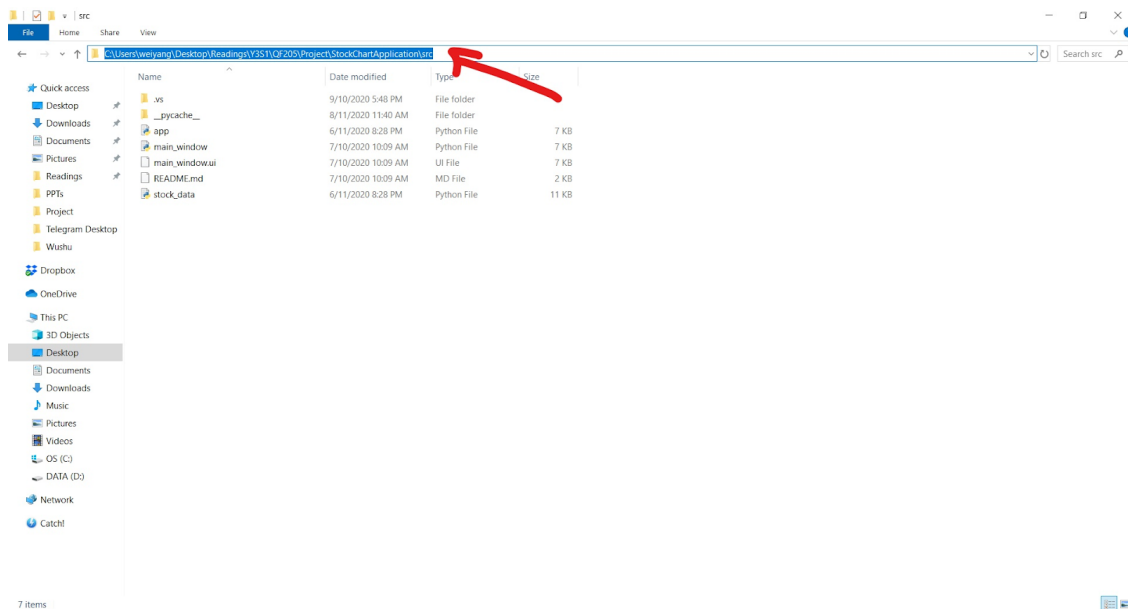
2. Loads the information in the stock data file into the application by pressing `Load CSV File`
3. The date range to be viewed can be changed here. (format: YYYY-MM-DD).
4. The number of days used to compute the simple moving averages can be changed and toggled here.
5. Press `Update Window Button` to plot the stock price, the two SMAs, the location of crossovers, and the signal presented by the crossover.

1.2 Running the Application using Python shell

4 Steps of running the application using

(Recommended for Users who also want to know how to develop the application)

0. Install a Python distributor. In our case we will use **Anaconda**. **Anaconda** can be downloaded and installed from:
 - (Windows) https://repo.anaconda.com/archive/Anaconda3-2020.07-Windows-x86_64.exe
 - (Mac OS) https://repo.anaconda.com/archive/Anaconda3-2020.07-MacOSX-x86_64.pkg
1. Go to the `src` folder in the `StockChartApplication`, click on the address bar, and copy the directory location



2. Search for and run the command line shell of your python distributor. In this case we will search for and run **Anaconda Prompt**.
3. In the command line shell, type **cd** and then paste the directory address of the **src** folder then press **Enter** to change the directory
4. Type **python app.py** and press **Enter** to run the Stock Chart Application. The application window will appear, simply follow the previous section's instruction to use the application.

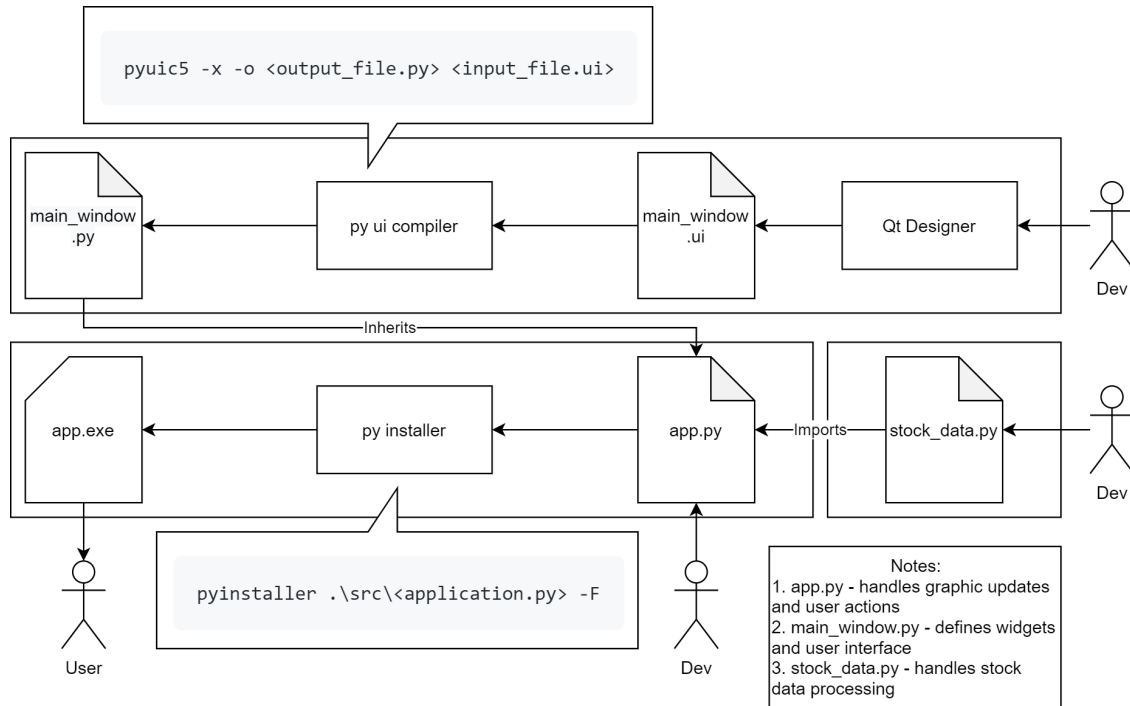


```

Anaconda Prompt (anaconda3)
(base) C:\Users\weiyang>cd C:\Users\weiyang\Desktop\Readings\Y3S1\QF205\Project\StockChartApplication\src
(base) C:\Users\weiyang\Desktop\Readings\Y3S1\QF205\Project\StockChartApplication\src>python app.py

```

1.3 Application Components



This application is made up of 3 components:

1. `main_window.py`
2. `stock_data.py`
3. `app.exe`

The user interface was developed using Qt Designer and saved into `main_window.ui`. This graphical user interface (GUI) file is then converted to `main_window.py` using a py ui compiler. `main_window.py` thus defines the widgets and the user interface for the application.

`stock_data.py` processes the stock data file provided by the user. This data file can be downloaded from sites such as yahoo finance by searching for a company and date range of the user's choice. The `stock_data.py` handles the stock data processing for the application and calculates the simple moving averages as well as identifying the locations of crossovers, before adding them to the stock data file.

`app.py` inherits the GUI from `main_window.py` and imports the data generated by `stock_data.py`, combining the two and completing the application. Pyinstaller was then used to package `app.py` into `app.exe`, which can be easily run by the user. Running `app.py` through a python shell or just running `app.exe` will launch the application.

The next section of the report will discuss how each of these 3 components are created (Please refer to the section headers to find the relevant part's information).

- For those **unfamiliar** with Python, it is recommended to read Section 2 and 3 about Python Basics and Packages.
- For those already **familiar** with Python, skip to Section 4, 5 and 6 corresponding to the 3 components.

2 Python Basics

2.1 Variables

Variables are containers for storing data values. Unlike other programming languages, a variable is created the moment you first assign a value to it. to assign a value to a variable, use the (=) sign.

Use `print()` to see the value assigned to the variable

```
[3]: x = 'apple'
      Y = 1
      _1 = 2
      print (x,Y,_1)
```

apple 1 2

Variable names in Python can be any length and can consist of uppercase and lowercase letters (A-Z, a-z), digits (0-9), and the underscore character (_). An additional restriction is that, although a variable name can contain digits, the first character of a variable name cannot be a digit.

```
[4]: 1apple = apple
```

```
File "<ipython-input-4-f38a6c9f9c71>", line 1
1apple = apple
  ^
SyntaxError: invalid syntax
```

2.2 Data types

Common Data types that are used in the projects includes

Text type - String (`str`)

Numeric type - Integer (`int`) - Float (`float`)

Sequence Type - list - range

Using `Print(type())` we can see the data type.

2.2.1 Text type

String(`str`)

Strings literal are denoted by single (' ') or double quotes (" ")

Examples of String

```
[ ]: x = 'apple'
      y = "pear"
      print(type(x))
```

We can find the length of the variable by using the in build function `len()`

```
[ ]: print(len(x))
      print(len(y))
```

2.2.2 Numeric type

Integer (`Int`)

`Int` are whole integers which has no decimal points and have unlimited length. Examples of Integers. Underscore are allowed between integer groupings

```
[2]: x = 1_3
      y = -2
      print(type(x))
```

```
<class 'int'>
```

Wrong examples:

Example `z` gives a `invalid token` error because leading zero in a non-zero decimal number are not allowed

```
[3]: z = 01
```

```
File "<ipython-input-3-360f18516b30>", line 1
z = 01
    ^
```

```
SyntaxError: invalid token
```

Float (`float`)

Float are Floating point numbers that contains one or more decimals

underscore are allowed between float groupings

```
[5]: x = 1.0
      y = -3.14_24
      print(type(y))
```

```
<class 'float'>
```

`Int` can be converted to `float`, vice versa.

```
[ ]: x = 1
      print(type((x)))
      print(x)
      x = float(x)
      print(type((x)))
```

```
print(x)
x= int(x)
print(type((x)))
print(x)
```

Wrong examples:

Example z gives a **syntax error** because as the underscore is not between digits.

```
[4]: z = 31._3
```

```
File "<ipython-input-4-16e45c8381ba>", line 1
z = 31._3
      ^
```

SyntaxError: invalid syntax

2.2.3 Sequence type

List List is a collection which is ordered and changeable.

A single list may contain DataTypes like Integers, Strings, as well as Objects. **List** are mutable, and hence, they can be altered even after their creation.

The elements in a list are indexed according to a definite sequence and the indexing of a **list** is done with 0 being the first index.

```
[6]: list_example= ['a',1,'c']

print(list_example)
print(list_example[0])
```

```
['a', 1, 'c']
a
```

We can find the length of the **list** by using **len()**

```
[7]: print(len(list_example))
```

```
3
```

2.3 range

The **range()** function is used to generate a sequence of numbers over time.

We can create a start, stop and step while using the **range()** function.

The syntax of range function is : **range(start,stop,step)**

Start is where the range start (inclusive), stop is where the range stops at (exclusive), step determines each increment

```
[8]: print(range(5))
      print(range(2,5))
      print(range(1,10,2))
```

```
range(0, 5)
range(2, 5)
range(1, 10, 2)
```

2.4 Type conversion

We can convert one type of data to another with `int()`, `float()` and `str()`.

```
[9]: x = 1
      print(type(x))

      x = str(x)
      print(type(x))

      x = float(x)
      print(type(x))

      print(x)
```

```
<class 'int'>
<class 'str'>
<class 'float'>
1.0
```

However, converting data type to an invalid literal would give a `ValueError`.

```
[10]: x = 'apple'
      x = int(x)
      print(type(x))
```

```

      □
↳ -----

ValueError                                Traceback (most recent call↳
↳ last)

<ipython-input-10-7753f23209e0> in <module>
      1 x = 'apple'
----> 2 x = int(x)
      3 print(type(x))

ValueError: invalid literal for int() with base 10: 'apple'
```


2.5 Concatenation and Operations

Concatenate by using (+) operator - Multiply using () operator - Minus using (-) operator - Divide using (/) operator - Modulus using (%) operator - to find remainder - Exponentiation using (*) operator - Floor division using (//) operator

```
[11]: x = 'hi'
      y = 'bye'
      z = 2
      print(x+y)
      print(x*2)
      x = 3
      y = 2
      print(x+y)
      print(x-y)
      print(x*y)
      print(x/y)
      print(x%y)
      print(x**y)
      print(x//y)
```

```
hibye
hihi
5
1
6
1.5
1
9
1
```

2.6 Operator precedence

Operator have different precedence. It is important to take note of the precedence of the operator in order to accurately represent your equations. We can also use the Brackets to represent the precedence.

This is the operator precedence from Lowest to highest precedence.

1. +,-
2. *,/,//,%
3. **

Examples of Operator precedence

```
[13]: print(3**2 * 3 +1)

      print(2**2**3)

      print((20+2*4) / 2)
```

28
256
14.0

2.7 Logical operators

A logical operator is a symbol or word used to connect two or more expressions such that the value of the compound expression produced depends only on that of the original expressions and on the meaning of the operator. Common logical operators include AND, OR, and NOT.

and Returns True if all of the statements is true

or Returns True if one of the statements is true

not Reverse the result, returns False if the result is true Examples:

```
[14]: x = 5  
      y = 5  
      z = 5  
      print(x < 3 and x < 10)  
      print(y > 3 or y < 10)  
      print(not(z < 4))
```

False

True

True

2.8 Assignment Statement

We can (re)bind names to values and also modify attributes or mutable objects using assignment statements.

When assigning the variable x to a different value, we can see that variable x id is also changed by using the in-build function `id()`.

However, it is possible that two objects with non-overlapping lifetimes can have the same `id()` value.

```
[16]: x=1  
      print(id(x))  
      x=3  
      print(id(x))  
      print(x)
```

140734888321424

140734888321488

3

2.9 Comments

We can use write comments on our code by using the hash character(`#`).

A comment signifies the end of the logical line most of the time, unless implicit line joining rules are invoked which would result in a syntax error.

```
[21]: x = 1 # x is being assigned the value 1
```

```
[20]: x = 1 \ #explicit line joining  
      print(x)
```

```
File "<ipython-input-20-bda2e21dbab5>", line 1  
x = 1 \ #explicit line joining  
      ^
```

SyntaxError: unexpected character after line continuation character

2.10 Indentation

Indentations begins at the start of the logical line which is used to determine the grouping of the statements.

Indentation are rejected if there are an inconsistent mix of tabs and spaces. This causes a Tab Error.

```
[22]: if 1<4:  
      print('yes')  
      else:  
      print('no')
```

yes

```
[ ]: if 1>4:  
      print('yes')  
      else:  
      print('no')
```

2.11 Functions

A function is a block of organized, reusable code that is used to perform a single, related action. Functions provide better modularity for your application and a high degree of code reusing.

You can pass data, known as parameters, into a function. A function can return data as a result.

We use `def` to define a function. `def` is followed by the function name and a parentheses and a colon punctuation.

This is a basic example of a function that prints a string

```
[23]: def my_function():  
      print("Hello from a function")
```

By typing `my_function()`, this would call the function and run the action it in which is to print
Hello from a function

```
[24]: my_function()
```

Hello from a function

Information can be passed into functions as arguments.

Arguments are specified after the function name, inside the parentheses. You can add as many arguments as you want, just separate them with a comma.

We use the return function to send back an output

Examples of Parameters: `Sum(x,y)`

A parameter is the variable listed inside the parentheses in the function definition.

Examples of arguments: `Sum(1,2)`

An argument is the value that is sent to the function when it is called.

Example of how a function with arguments and parameter.

1. Create the function
2. Define the parameters
3. Action in the function
4. The desired output

```
[27]: def sum(x,y):  
      return (x+y)
```

5. call the function and input the arguments

```
[28]: total_sum = sum(1,2)  
      print(total_sum)
```

3

It is good practice to make sure you have the same number of arguments and parameter.

If we are missing an argument, there would be a **TypeError** stating that the function is missing a required positional argument

```
[29]: total_sum = sum(1)  
      print(total_sum)
```

```
↳  
-----  
TypeError                                Traceback (most recent call↳  
↳last)
```

```
<ipython-input-29-64f0fd9ad24f> in <module>
----> 1 total_sum = sum(1)
      2 print(total_sum)
```

```
TypeError: sum() missing 1 required positional argument: 'y'
```

If we input more arguments than the parameter, we would also get a **TypeError** stating the function `sum()` takes 2 positional arguments but 3 were given.

```
[30]: total_sum = sum(1,2,3)
      print(total_sum)
```

last) TypeError Traceback (most recent call)

```
<ipython-input-30-5c272ec8fe3b> in <module>
----> 1 total_sum = sum(1,2,3)
      2 print(total_sum)
```

```
TypeError: sum() takes 2 positional arguments but 3 were given
```

For Arbitrary Arguments, `*args`

If you do not know how many arguments that will be passed into your function, add a * before the parameter name in the function definition.

This way the function will receive a **tuple** of arguments, and can access the items accordingly:

```
[31]: def name(*friend):  
        print("The best friend is " + friend[2])  
  
name("Bob", "Tom", "Eden")
```

The best friend is Eden

Keyword Arguments

You can also send arguments with the `key = value` syntax.

This way the order of the arguments does not matter.

```
[32]: def fruits(fruit3, fruit2, fruit1):
```

```
print("My favourite fruit is " + fruit2)

fruits(fruit1 = "apple", fruit2 = "pear", fruit3 = "orange")
```

My favourite fruit is pear

Arbitrary Keyword Arguments

****kwargs** If you do not know how many keyword arguments that will be passed into your function, add two asterisk: ****** before the parameter name in the function definition.

This way the function will receive a dictionary of arguments, and can access the items accordingly:

```
[33]: %reset -f

def fruit_function(**fruit):
    print("My favourite fruit is " + fruit["fruit2"])

fruit_function(fruit1 = "apple", fruit2 = "pear")
```

My favourite fruit is pear

2.12 Loops

Loops allow the code to iterate and repeat itself within set parameters. Loops allow you to automate processes within the program using a few lines of code.

Loops typically come in two forms: 1. the **For** statement 2. the **While** statement

The **for** statement iterates over the elements of a sequence, such as a string, **list**, **range**, or other iterable objects. With the **for** loop you can automatically execute the code once for each item in the sequence.

An example of a **for** loop would be:

```
[35]: dateList = ["01-01-2000", "31-12-2020", "05-06-2018", "04-10-2010"]
for date in dateList:
    print(date)
```

```
01-01-2000
31-12-2020
05-06-2018
04-10-2010
```

The **date** between **for** and **in** in the code is arbitrary, and can be replaced by any other letter or string.

In this case **date** is known as the **target_list**, while the actual list of dates is known as the **expression_list**. The **target_list** can also have multiple values matching the number of values within the **expression_list** such as:

```
[36]: for (i,j) in [(1,2), (3,4), (5,6)]:  
      print(i)  
      print(j)
```

```
1  
2  
3  
4  
5  
6
```

the number of values in the target_list not matching the number of values in the expression_list will give an error:

```
[37]: for (i,j,k) in [(1,2), (3,4), (5,6)]:  
      print(i)  
      print(j)  
      print(k)
```

```
↳ -----  
ValueError                                Traceback (most recent call↳  
↳last)  
  
    <ipython-input-37-0e03c00705c4> in <module>  
----> 1 for (i,j,k) in [(1,2), (3,4), (5,6)]:  
      2     print(i)  
      3     print(j)  
      4     print(k)
```

ValueError: not enough values to unpack (expected 3, got 2)

For loops can also be used in conjunction with the range() function such as in:

```
[38]: n = 5  
      for i in range(n):  
          print(i)
```

```
0  
1  
2  
3  
4
```

On the other hand, the while statement repeatedly tests an expression and executes the code for

as long as the expression is true.

An example of a `while` loop would be:

```
[ ]: i = 1
while i < 6:
    print(i)
    i += 1
```

as long as `i` is less than 6, the code will print the current value of `i` before adding 1 to the value of `i`. When the value of `i` reaches 6 the loop will automatically end.

2.13 if/elif/else

`if...elif...else` statement is used for decision making in Python. If statement is represented by `if` and it will only be executed when the statement is true. Else if statement is represented by `elif` and it will only execute when the statement is true and if the previous statement was not true. Else statement is represented by `else` and it will only execute when all previous statement were not true. Note: the statements must have a boolean output and each statement blocks have to be indented.

Example:

```
[39]: a = 200
      b = 33

      if b > a: #if b is greater than a, python would run the action in the if
          →condition. The following code with continue to run
          print("b is greater than a")
      elif a == b: #if a and b are equal and the previous condition is false, python
          →would run the action in the elif condition.
          print("a and b are equal")
      else: # python would run the else condition if all previous conditions are false
          print("a is greater than b")
```

a is greater than b

There is also an alternative way to write `if/else/elif` statements that are one liner.

```
[40]: a = 200
      b = 33
      if b > a: print("b is greater than a")
      else: print("a is greater than b")
```

a is greater than b

More examples:

```
[45]: dateIndex = 5

      if dateIndex < 3: #10 is more than 3, therefore this statement is false
```



```

    print(dateIndex, 'less than 3');
elif dateIndex < 8: #since previous statement is false, it will land on elif
    →statement. Since 10 is more than 8, therefore it is false
    print(dateIndex, 'less than 8');
else: #since all previous statements is false, it will execute the else block
    print(dateIndex);

```

5 less than 8

Indentations are important in `if/else/elif` conditional statements. If the indentations are not properly used after declaring the `if/else/elif` statements, there will be an indentation error. `dateIndex+1 = 5` statement won't give you a boolean output which will give you an error. The correct statement is `dateIndex+1 == 5`, which will give you either `true` or `false`.

Bad example:

```

[47]: If dateIndex+1 = 5:
      print(dateIndex);
      else:
      print(dateIndex);

```

```

File "<ipython-input-47-6604c19b7ed8>", line 1
If dateIndex+1 = 5:
    ^

```

```

SyntaxError: invalid syntax

```

2.14 Tuple

Tuple is one of the basic sequences. It is immutable and usually used to store collections of data. Tuple may be constructed in different number of ways: using a pair parentheses to denote the empty tuple: `()` Using a trailing comma for singleton tuple: `1,` or `(1,)` Separating items with commas: `1, 2, 3` or `(1, 2, 3)` Using the `tuple()` built-in: `tuple()` or `tuple([1,2,3])` *#tuple(iterable)*

The constructor builds a tuple whose items are the same and in the same order as iterable's items. Iterable may be either a sequence, a container that supports iteration, or an iterator object. If iterable is already a tuple, it is returned unchanged. For example, `tuple('haha')` returns `('h', 'a', 'h', 'a')` and `tuple([a, b, c])` returns `(a, b, c)`. If no argument is given, the constructor creates a new empty tuple, `()`. Note: Comma is what makes a tuple, not the parentheses. Parentheses are only compulsory when constructing an empty tuple or when they are needed to avoid syntactic ambiguity. Example `f(z, y, x)` *#this is a function with 3 arguments* `f((z, y, x))` *#this is a function with a 3-tuple as the only argument*

```

[48]: tuple('haha')

```

```

[48]: ('h', 'a', 'h', 'a')

```

```
[49]: tuple('1')
```

```
[49]: ('1',)
```

2.15 F-strings

A new string formatting mechanism known as Literal String Interpolation or more commonly as **F-strings** (because of the leading **f** character preceding the string literal). The idea behind **f-strings** is to make string interpolation simpler. We would input variables in `{ }` that will be replaced with their values.

Examples:

```
[50]: name = 'bob'
      age = 23
      print(f"Hello, My name is {name} and I'm {age} years old.")
```

Hello, My name is bob and I'm 23 years old.

2.16 Try Except

The **try** and **except** block in Python is used to catch and handle exceptions. The **try** block lets you test a block for exceptions. The **except** block lets you catch and handle the exceptions if there are any.

Example:

```
[51]: num1 = 1
      num2 = 0
      try: #Python will try to run the code in the try block
            print(num1/num2) #There is a division by 0 situation and python raise a
            ↪ ZeroDivisionError
      except ZeroDivisionError as e: #Except block catches the ZeroDivisionError
            ↪ exception and run the except block
            print("You cannot divide by 0" ) #Python prints "You cannot divide by 0"
```

You cannot divide by 0

2.17 Assert Statement

The **assert** Statement: When it encounters an **assert** statement, Python evaluates the accompanying expression, which is hopefully true. If the expression is false, Python raises an **AssertionError** exception. If the assertion fails, Python uses **ArgumentExpression** as the argument for the **AssertionError**.

Examples:

We first have to **assert** a condition

```
[ ]: assert condition
```

We then set a conditional statement to immediately trigger an error if the condition is false. The `AssertionError()` is a function that is predetermined by the user and it would run when the if condition is trigger.

```
[ ]: if not condition: raise AssertionError()
```

2.18 Exception

Exceptions are errors that were detected during execution. Exception can arise even if a statement and expression is syntactically correct, the cause is due to python not being able to cope with the code. It comes in different types and the type is printed as part of the error message.

Examples:

```
[ ]: ValueError # Raised when an operation or function receives an argument that has
    ↳ the right type but an inappropriate value, and the situation is not
    ↳ described by a more precise exception such as IndexError.
    AssertionError # Raised when an assert statement fails

    KeyError # Raised when a mapping (dictionary) key is not found in the set of
    ↳ existing keys.

    ZeroDivisionError # Raised when the second argument of a division or modulo
    ↳ operation is zero. The associated value is a string indicating the type of
    ↳ the operands and the operation.
```

Exception error message comes in form of a stack traceback and it shows the context where the exception occurred.

Example

```
[ ]: #Assertion Stack traceback message
Traceback (most recent call last):
  File "/home/bafc2f900d9791144fbf59f477cd4059.py", line 4, in
    assert y!=0, "Invalid Operation" # denominator can't be 0

AssertionError: Invalid Operation
# We can tell that this is an AssertionError from the name of this exception
↳ and the assertion error occurred in line 4 of the code.
```

Exceptions are not unconditionally fatal as it is possible to write programs that handle selected exceptions. To handle exceptions, Try Except is required. Look at the following example, it assigns two variables `num1` and `num2` with a value of 1 and 0 respectively. Python will try to execute the try block but `num1` is divided by 0 which raises a `ZeroDivisionError`. The except block will catch the exception `ZeroDivisionError` and execute the except block.

```
[53]: num1 = 1
      num2 = 0
      try:
```

```
print(num1/num2)
except ZeroDivisionError as e:
    print("You cannot divide by 0")
```

You cannot divide by 0

2.19 Lambda Function

A lambda function is a small anonymous function. A lambda function can take any number of arguments, but can only have one expression.

Examples:

```
[54]: x = lambda a : a + 10 # 5 is assigned to a, this would return a value of 15
      print(x(5))
```

15

```
[55]: x = lambda a, b, c : a + b + c # lambda can take any number of arguments.
      print(x(5, 6, 2))
```

13

The power of lambda is better shown when you use them as an anonymous function inside another function. Say you have a function definition that takes one argument, and that argument will be multiplied with an unknown number

Examples:

```
[56]: def myfunc(n): # we define a function with parameter (n)
      return lambda a : a * n # this returns a value of 3*11=33

      mytripler = myfunc(3)

      print(mytripler(11))
```

33

2.20 Classes, Object

Python is an object oriented programming language. Almost everything in Python is an object, with its properties and methods. A Class is like an object constructor, or a blueprint for creating objects. Classes allow us to bundle data and functionalities together.

To create a class we have to use the keyword class

Example:

```
[57]: class MyClass:
      x = 5
```

Creating a new class would also create a new type of object. This would create a new instance of that type to be made. Now we can use the class named MyClass to create objects:

Examples:

```
[58]: p1 = MyClass()
      print(p1.x)
```

5

All classes have a function called `init()`, which is always executed when the class is being initiated. Use the `init()` function to assign values to object properties, or other operations that are necessary to do when the object is being created.

Create a class named Person, use the `init()` function to assign values for name and age

Example:

```
[59]: class Person:
      def __init__(self, name, age): #create a function with parameters self, name, ↵
      ↪age
          self.name = name
          self.age = age

      p1 = Person("John", 36)

      print(p1.name) # this would print the
      print(p1.age)
```

John

36

If one more argument is given when creating an object, there would be a `TypeError: init() takes 3 positional arguments but 4 were given`

Bad Example:

```
[60]: class Person:
      def __init__(self, name, age): #create a function with parameters self, name, ↵
      ↪age
          self.name = name
          self.age = age

      p1 = Person("John", 36, 46)

      print(p1.name) # this would print the
      print(p1.age)
```

```

└─
└─
-----
TypeError                                Traceback (most recent call└─
└─last)

<ipython-input-60-25e376e34c50> in <module>
      4     self.age = age
      5
----> 6 p1 = Person("John", 36, 46)
      7
      8 print(p1.name) # this would print the

TypeError: __init__() takes 3 positional arguments but 4 were given

```

If one less argument is given when creating an object, there would be a `TypeError`

Bad Example:

```

[61]: class Person:
      def __init__(self, name, age, gender): #create a function with parameters└─
      └─self, name, age
          self.name = name
          self.age = age

p1 = Person("John", 36)

print(p1.name) # this would print the
print(p1.age)

```

```

File "<ipython-input-61-e8fbb26d380d>", line 4
self.age = age
          ^

```

`TabError: inconsistent use of tabs and spaces in indentation`

Objects can also contain methods. Methods in objects are functions that belong to the object.

Example:

```

[62]: %reset -f

class Person:
    def __init__(self, name, age):
        self.name = name

```

Hello my name is John

A `TypeError` would occur if there is a missing argument.

```
[63]: %reset -f

class Person:
    def __init__(self, name, age):
        self.name = name
        self.age = age

    def myfunc(self, name):
        print("Hello input name is " + self.name)

p1 = Person("John", 36) # creates a person object with the two argument.
p1.myfunc()#call object methods myfunc(self) but there is a missing parameter
```

```
TypeError: myfunc() missing 1 required positional argument: 'name'
```

2.21 Inheritance

Inheritance allows us to define a class that inherits all the methods and properties from another class. The class inheritance mechanism allows multiple base classes. A derived class can override any methods of its base class or classes. A method can call the method of a base class with the same name.

There are 2 main classes, Parent class and Child class. Parent class is the class being inherited from, also called base class. Child class is the class that inherits from another class, also called derived class. We can create a parent class

Example:

```
[64]: %reset -f
class Person:
    def __init__(self, fname, lname):
        self.firstname = fname
        self.lastname = lname

    def printname(self):
        print(self.firstname, self.lastname) #Use the Person class to create an
        →object, and then execute the printname method:

x = Person("JunJie", "Edwin")
x.printname()
```

JunJie Edwin

We then create child class. This child class will inherit the properties and methods from the Person class

Example:

```
[65]: class Student(Person):
        pass # we use pass because we don't want to add any other properties or
        →methods to class.
```

We can then create the child class (student) to create an object.

```
[66]: x = Student("Casper", "Calvin")
x.printname() #print out the properties in the class.
```

Casper Calvin

Super() Function

Python has a function called `super()`. This would make the child class inherit all the methods and properties from its parent. By using `super()` function, you do not have to use the name of the parent element, it will automatically inherit the methods and properties from its parent.

```
[67]: class Student(Person):
        def __init__(self, fname, lname):
```



```
super().__init__(fname, lname)

x = Student("Michael", "Jackson")
x.printname()
```

Michael Jackson

3 Python Packages

3.1 Modules

Modules are files containing a set of functions you want to include in your application. Modules are useful because they can store a handy function that you may need to use often into it. You can then call the function from the module whenever you need it.

In python, there is a way to put definitions in a file and use them in a script. These files are known as modules. Definitions and functions in a module can be imported into other modules.

To create a module, you would need to save a code into a file with the suffix `.py` appended.

A docstring is a string literal that usually appears as the first statement in a module. It is used to explain what the module does. The docstring becomes a `__doc__` special attribute of that object.

There are several built-in modules in python which can be imported and called at any time.

Example:

4 stock_data.py

4.1 import statements

Firstly, we import all the packages that would be used in `StockData.py`. We used the `import` statement and created an alias for the packages using the `as` statement. We import `numpy` because we would be using some of the in-built functions such as `np.nan`. `pandas` package would enable us to read and overwrite our CSV datafiles. `matplotlib.pyplot` package would be used for plotting the stock data into graphs.

```
import numpy as np
import pandas as pd
import matplotlib.pyplot as plt
```

Learning points: Package Aliasing

The programmer can create alias for their imported packages so that it would be easier for them to recognize and use the functions in the packages.

4.2 class statement

We create a class name `StockData` which will contain the attributes and functions.

```
class StockData():
```

Learning point: Classes

Classes are often created because it allows us to bundle data and functionalities together.

4.3 `__init__(self)` (constructor statement)

We create a constructor using `__init__` which requires one string parameter: `filepath`. The attribute `filepath` stores the parameter `filepath`. The attribute `data` stores the pandas dataframe which is extracted from a CSV file found in the `filepath`. When constructing a `StockData` object, it will call and run the `check_data()` function.

```
31     self.filepath = filepath
32     self.data = pd.read_csv(filepath).set_index('Date')
33     self.check_data()
```

**Learning point: Default Constructor*

If you do not create a Constructor, Python will automatically create a default constructor that does not do anything.

4.4 `check_data(self, overwrite=True)`

We first start by checking for any missing data and then filling in any missing values by interpolation in the csv data. We use the `interpolate()` function to fill in the estimated values. The `interpolate` function uses a linear interpolation which takes the average of the value before and after the data point to come out with an estimation. We started with this step so that our dataset would be cleaned and have no missing values.

We define a function name `check_data()`. This functions checks and handles missing data by filling in missing values by interpolation. The parameter (`overwrite = True`) takes a boolean value and overwrites the original source stock data .csv file.

```
48     self.data = self.data.interpolate()
```

Learning point: Indentation

When creating a function, we would need to make sure there is proper indentation after the colon. All the code that is in the function would need to have the same indentation.

The next part is to overwrite the original stock data.csv file. We would use a pandas inbuilt function `to_csv()` with the parameters (`self.filepath`) as the filepath and (`index= overwrite`) to overwrite the csv file.

```
49 self.data.to_csv(self.filepath, index=overwrite)
```

We then use `return` to send the `StockData` to any code that calls this function.

```
50 return self
```

Learning point: `return` statement

`return` statement is often used at the end of the function to returns the results (values) of the expression to the caller. Statements after the `return` statement are not executed. If the `return` statement is without any expression, the value returned would be `none`.*

4.5 `get_data(self, start_date, end_date)`

The `get_data` function to return a subset of the stock data from `start_date` to `end_date` inclusive. The parameter `start_date` and `end_date` has a type `str` that is the start date and `end_date` of stock data range, must be of format `YYYY-MM-DD`.

The variable `self.selected_data` would store a dataframe indexed from the specified start to end date inclusive.

```
72 self.selected_data = self.data[str(start_date):str(end_date)]
```

We then use `return` to send the `selected_data` that consist of start and end dates to any code that calls this function.

```
73 return self.selected_data
```

4.6 `get_period(self)`

The `get_period` function is used to obtain the earliest and latest date in the `data` dataframe. Since `data` have index based on the date, we can obtain a list of date with `list(self.data.index)`. With the list, we can obtain the first and last index in the list and return them in a tuple.

```
87 index = list(self.data.index)
88 (first, last) = (index[0], index[-1])
89 return (first, last)
```

Learning point: Returning Multiple Variables

If you want to return more than one variable, you can return them in heterogeneous containers like tuple or list.

4.7 `calculate_SMA(self, n)`

In the `calculate_SMA` function, we take in 1 parameter: `n` which is the number of days used to calculate the simple moving average (SMA). With `n`, we will create a column label named `SMA + n`.

```
194 col_head = 'SMA' + str(n)
```

For example, if `n` is 15, the column label will be named 'SMA15'

Due to the dataframe of the `self.data` having an index using the date, we use `reset_index()` to undo the index and reinclude date into one of the columns.

```
195 df = self.data.reset_index()
```

**Learning point: Built-in Functions*

To speed the working progress, we should use in-built functions provided by packages if it fulfil the requirements.

Then we check if the column name `col_head` is found in `df` by using the following code:

```
197 if col_head not in df.columns:
```

Learning point: not

not is a logical operator commonly used with conditional statements such as *if else* or *while*.

If it is found in `df`, we will `return self` and leave the dataframe untouched as the SMA of `n` number of days has already been calculated. Otherwise, we will begin the calculation.

We begin by retrieving the list of date found in the `self.data`(portion of the full data) and creating `returnList` which will store the calculated SMA later on by using the following code:

```
200     dateList = self.data.index.values.tolist()
201     returnList = []
```

With this list of data, we will do a for loop with each of the date in the list and find the index of each specific date in the full dataset. We will then use these `dateIndex` to see if there are enough datasets to calculate the SMA. For example, we need 15 data set prior to the current day in order to calculate the SMA of 15 days. If there is not enough data prior to the current date, we will append NaN into the `returnList` to show that we do not have SMA for that current date.

```
202     for date in dateList:
203         dateIndex = df[df["Date"]==date].index.values[0]
204         if dateIndex < n: # if date index is less than n: append None
205             returnList.append(np.nan)
206         else:
207             sum = 0
208             for i in range(n):
209                 sum += df.iloc[dateIndex-i]["Close"]
210             returnList.append(sum/n)
```

If there is enough data, we will do a for loop with `n` number of iterations to calculate the sum of adjusted close values for `n` number of days which is the SMA value. At the end of the loop, we will append the SMA into `returnList`.

After calculating all the SMA for every date in `self.data`, we insert the `returnList` containing all the SMA value with a column name stored in `col_head`. At the end of the function, we save the dataframe with SMA into a CSV file.

```
214     self.data[col_head] = returnList
216     self.data.to_csv(self.filepath, index=True)
```

4.8 calculate_crossover(self, SMAa, SMAb)

We first start by creating and defining the shell of the `calculate_crossover` function:

```
220 def calculate_crossover(self, SMAa,SMAb):
...
300     return self
```

This function takes in the two SMA values previously calculated in the `calculate_sma` function as inputs to calculate the crossover locations.

Next we will start to write the code inside the function. We first define the columns we plan to add to the .csv file and extract the all data in the .csv file:

```
244 col_head3 = 'Buy'
```

```
245 col_head4 = 'Sell'
246 df = self.data
```

We convert the data into a list which we will use as a reference to ensure our subsequent calculations have the correct number of elements

```
249 SMAlist = self.data.index.values.tolist()
```

We then use an if, elif, and else statement to assign the lower SMA to SMA1 from the and the higher SMA to SMA2. This is useful later in the calculations to ensure that buy and sell signals are correctly identified.

```
251 if SMAa < SMAb:
252     SMA1 = df[SMAa].tolist()
253     SMA2 = df[SMAb].tolist()
254 elif SMAa > SMAb:
255     SMA1 = df[SMAb].tolist()
256     SMA2 = df[SMAa].tolist()
257 else: # SMAa == SMAb
258     raise ValueError(f"Given {SMAa} & {SMAb} are the same. Must be different SMA.")
```

Learning point: if, elif, and else statements

elif is used here because there are multiple distinct different possibilities with how SMAa and SMAb are related. It is common to list the expected possibilities first in the if and elif statements, and else would normally be reserved for unexpected outcomes or errors

df.[SMAa].tolist() extracts the column SMAa from the dataframe df and converts it to a list. Likewise for df.[SMAb].tolist(). If the two SMA values are equal, the code will raise a value error and the error message.

We create empty lists for the relative position of the two SMAs (stockPosition), the combined list of crossover signals (stockSignal), and finally separate lists for the buy and sell signals (buySignal, sellSignal). These lists will be referenced and used in the next few lines of code.

```
260 stockPosition = []
261 stockSignal = []
262 buySignal = []
263 sellSignal = []
```

To create a list of relative SMA positions, we use a for loop:

```
266 for i in range(len(SMAlist)):
267     if SMA1[i] > SMA2[i]: stockPosition.append(1)
268     elif SMA1[i] < SMA2[i]: stockPosition.append(0)
271     elif SMA1[i] == SMA2[i]: stockPosition.append(stockPosition[i-1])
272     else: stockPosition.append(np.nan)
```

By setting the range of the for loop to be the length of SMAlist, we ensure that the loop iterates over every single element in the dataframe.

Any day that SMA1 (the smaller one) is higher than SMA2 will add a 1 to the stockPosition list. Days where SMA2 is higher than SMA1 will add a 0 to the stockPosition list. The end result will

be a list of 1s and 0s showing which SMA is higher on any given day.

In the unlikely case that the two SMA values are equal in a day, the number added will be a repeat of the previous day, as no crossover has occurred yet.

On days where either SMA is missing data, such as in the first few days when there is not enough data to compute the SMA, we will add `np.nan` to the list as a filler.

After getting the full `stockPosition` list, we need to identify the days where crossover occurs. For this, another for loop is used:

```
275 for j in range(len(stockPosition)):
278     if j == 0: stockSignal.append(np.nan)
280     else: stockSignal.append(stockPosition[j] - stockPosition[j-1])
```

Again we set the range for the loop to be the length of `stockPosition` to ensure the code iterates over every element.

The `stockSignal` list 'lags' behind the `stockPosition` list by one day, hence we add a `np.nan` as the very first value in the list to align the `stockSignal` list with the `stockPosition` list and ensure that both lists have the same number of elements.

Following that we take the difference between the `stockPosition` that day and the `stockPosition` the previous day to identify the locations of crossovers. Crossovers show up in the list as 1 for a buy signal, and a -1 for sell signals. 0 indicates that there has been no crossover that day.

Learning point: indexing

Remember that in python, sequences start with 0, not 1! Hence, `j == 0` just refers to the first element in the range

Learning point: `np.nan`

Remember that any arithmetic operation on `NaN` will result in `NaN`. This allows us to append the list with null values without generating a value error

The next step would be to filter out the buy and sell signals, which will be processed separately by the application:

```
283 for k in range(len(stockSignal)):
284     if stockSignal[k] == 1:
285         value = self.data[SMAa].tolist()[k]
286         buySignal.append(value)
287     else: buySignal.append(np.nan)
288
289 for k in range(len(stockSignal)):
290     if stockSignal[k] == -1:
291         value = self.data[SMAa].tolist()[k]
292         sellSignal.append(value)
293     else: sellSignal.append(np.nan)
```

Using yet another set of for loops, we identify the crossover locations in the `stockSignal` list. At the crossover locations, we append the average SMA values of that particular day to the appropriate buy or sell list. This value will then be used as the y-axis value that the application uses to plot the crossover signals on the graph.

The else condition appends `np.nan` to the list on days that do not contain the respective crossover signals, and ensures that the signals are correctly aligned to the dates where the crossover occurred.

Finally, with the locations of buy and sell crossover signals, the function will append the buy and sell signals to the .csv file as new columns while also printing the results in the application:

```
295 self.data[col_head3] = buySignal
296 self.data[col_head4] = sellSignal
297
298 print(self.data)
299 self.data.to_csv(self.filepath, index=True)
```

Learning point: Testing

The reason why the function prints the results is so we can independently test whether the function works even before the rest of the app is completed. Splitting work up in such a complex application is crucial so you can identify exactly which part of the app is causing errors!

5 main_window.py

As mentioned, `main_window.py`'s main responsibility is to **define the graphic user interface (GUI) itself**. It does so by:

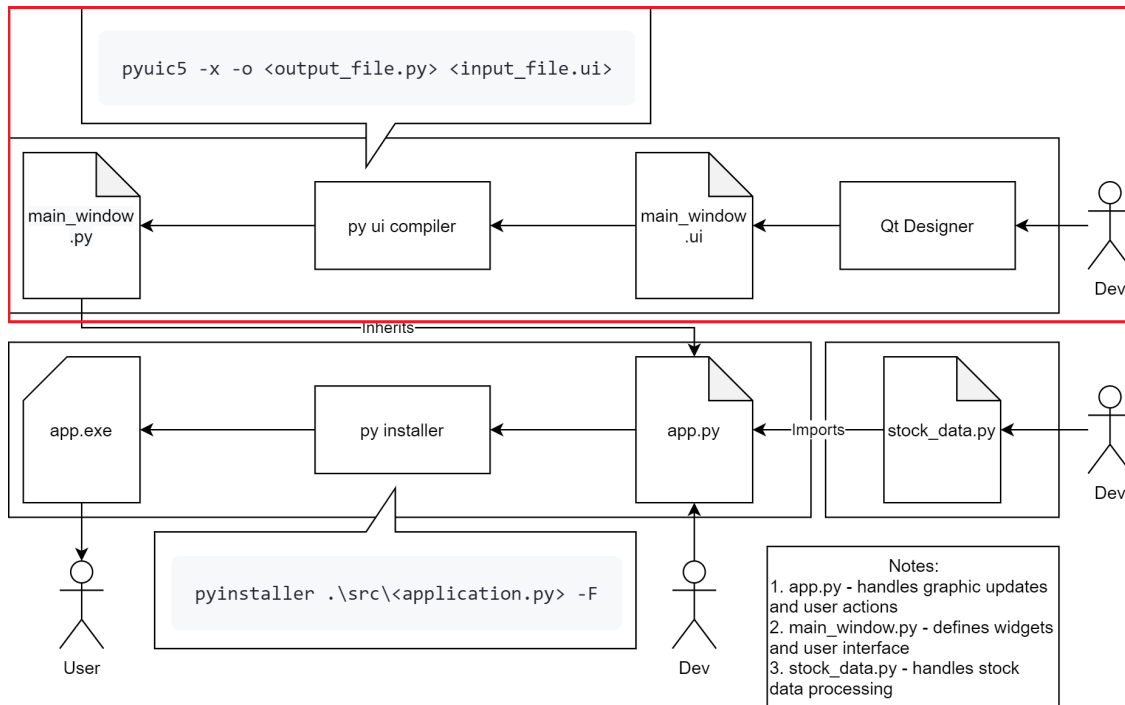
1. Defining each `Widget` objects' and their names within the GUI
2. Defining the location, size and other physical attributes of each `Widgets`

It does **NOT** define the functionalities of the `Widgets` found in the GUI. That is the job of `app.py`.

While it is possible to create `main_window.py` by manually writing a python script file from scratch, it is cumbersome. Instead, the following method was used develop the Stock Chart Application:

1. Install Qt Designer application
2. Use Qt Designer to build the GUI file called: `main_window.ui`
3. Pip install PyQt5 for python
4. Use `pyuic5` (a utility script that comes with PyQt5) to compile `main_window.ui` into `main_window.py`

The above-mentioned `main_window.py`'s development process is summarized in the graphics below:



This method is **recommended** because it is user-friendly and changes made can be seen visually on the **Qt Designer** itself before it is applied. Thus, not requiring the developer to run the python file after every changes or even knowing how do so at all.

This section of the report will now go through the 4 steps of developing `main_window.py` mentioned.

5.1 Installing Qt Designer

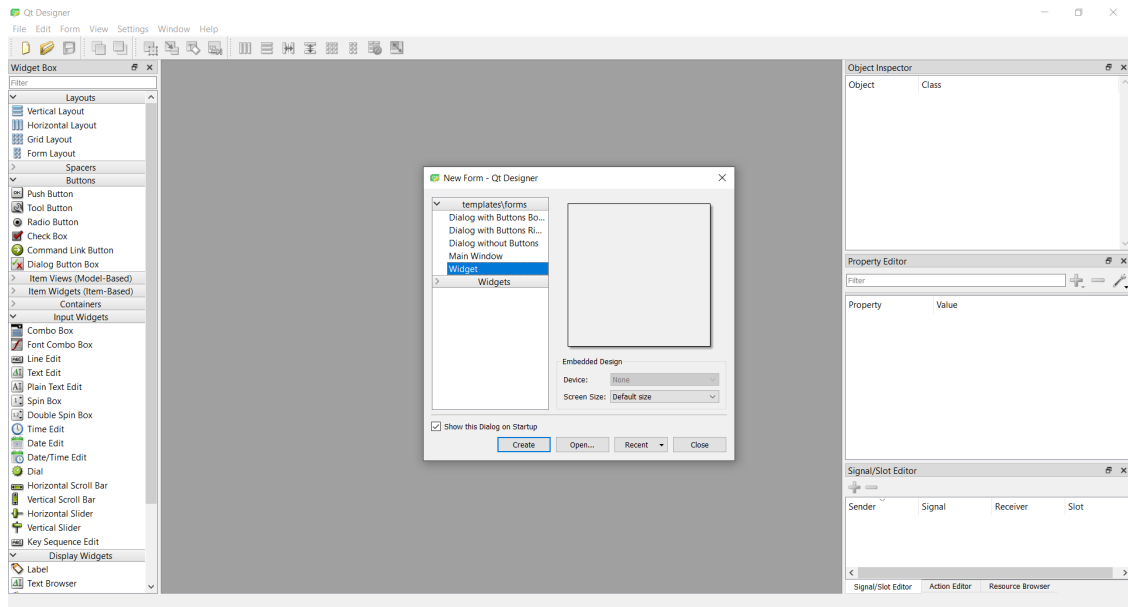
The installation process of **Qt Designer** is similar to any other application.

1. Go to: <https://build-system.fman.io/qt-designer-download>
2. Click either the **Windows** or **Mac** option. Depending on your computer's Operating System
3. Select a location for the Qt Setup Application **.exe** to be downloaded
4. Double click on the Qt Setup Application **.exe** and follow its installation procedure
5. Check that you have **Qt Designer** installed after the installation has completed

5.2 Building `main_window.ui` with Qt Designer

5.2.1 Defining the GUI

First, open **Qt Designer**. The following window and prompts will appear:



Choose `Widget` under the `template\forms` prompt and press the `Create` Button to begin designing `main_window.ui`.

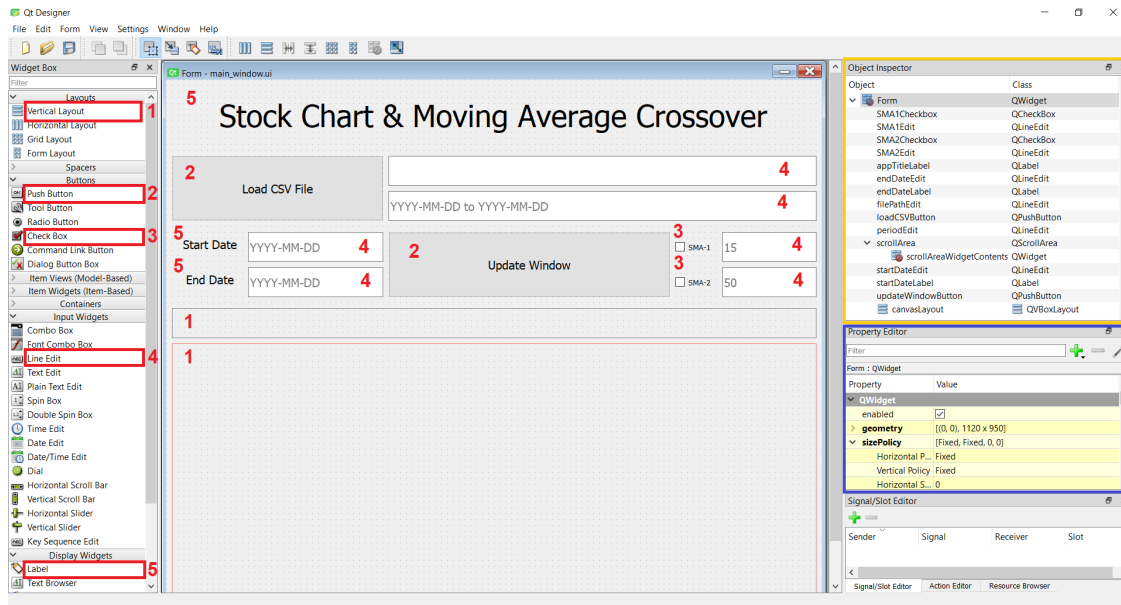
This is simply a starting template of our GUI, but it is important as the `Widget` option will later be used to inform `app.py` of the type of GUI being inherited.

Learning Point: Qt Designer + PyQt5 Template

*The information about the template is specified when the `.ui` file is started. The information is important because it specifies the **type** of GUI being inherited later. In this case, the `Widget` called `UI_Form` is going to be inherited by `app.py`*

5.2.2 Defining the Widgets inside the GUI

Second, start designing the `main_window.ui` GUI as shown in the image below:



To ‘design’ the GUI, simply **drag and drop** the appropriate **type** of Widget from the left side-bar called **Widget Box** into the GUI Widget.

This does imply that our GUI is a Widget (because we specify it as such in the `template\forms` option) containing Widgets.

For convenience, the **type** of the Widget used to make the GUI shown above has ben annotated with red boxes and numbers to show where to find each **type** of Widgets used to build the GUI.

Learning Point: Qt Designer + PyQt5 Widget Types

1. **Vertical Layout** : a layout to mark certain area
2. **Push Button** : an interactive button
3. **Check Box** : an interactive checkbox
4. **Line Edit** : a place to enter a line of text
5. **Label** : a non-interactive label to display texts

For each Widget being dragged and dropped into the GUI, remember to **name them accordingly** by editing the value of the `objectName` in the Property Editor (blue box). There are also other attributes values to play with!

For instance, this Stock Chart Application has its window **fixed to a specific size**. This can be done by specifying the following properties in the Property Editor of the UI Form (found in the Object Inspector):

1. Set `geometry` to: [(0, 0), 1120 x 950]
2. Set `sizePolicy` to: [Fixed, Fixed, 0, 0]

Tips: To preview the GUI inside Qt Designer, press **Ctrl + R** (for Windows users only).

Learning Point: Qt Designer + PyQt5 Widget Attributes

Different Widget will have different attributes. They can be found in the Property Editor. Some important attributes include: `objectName`, `geometry`, `sizePolicy`, `font`, etc...

Also, do refer to the Object Inspector (yellow box) in the `main_window.ui` image for a list of the **names of the widget** and their associated **Widget type**.

For example: name (Object): `SMA1CheckBox`, class (type): `QCheckBox`.

In short, these 2 actions: **dragging and dropping Widgets and editing values in Property Editor** correspond to what were initially meant by:

1. Defining each **Widget** objects' and their names within the GUI
2. Defining the location, size and other physical attributes of each **Widgets**

Finally, to save the `main_window.ui` file, press: **File > Save As** option on the top left hand corner of the window.

5.3 Installing PyQt5

Installing `PyQt5` is similar to installing any other python packages using PIP. Simply run the following command from the computer's terminal:

```
pip install PyQt5
```

`PyQt5` is a package comprising a comprehensive set of Python bindings for `Qt Designer v5`. As part of its package, it comes with a utility script called `pyuic5` which will be used to compile `.ui` files created using `Qt Designer` into a `.py` python module file.

5.4 Compiling `main_window.ui` into `main_window.py`

To compile the `main_window.ui` file into `main_window.py`, simply run the following command from the computer's terminal:

```
pyuic5 -x -o .\src\main_window.py .\src\main_window.ui
```

- The two flags `-x -o` are **required** for the program to work.
- The two arguments passed are also **required** as they are the **output** file path and the **input** file path.

Note: the two file paths assume that the command is run from the **root** directory and the `main_window.ui` file is saved in a directory called **src**.

6 `app.py`

While `main_window.py`'s responsibility is to **define the graphics user interface**, `app.py`'s responsibility is to **define the functionalities of the GUI**. This is achieved by doing 2 things:

1. Defining **functions** to accomplish certain actions
2. Connecting **Widget** actions to these **functions**

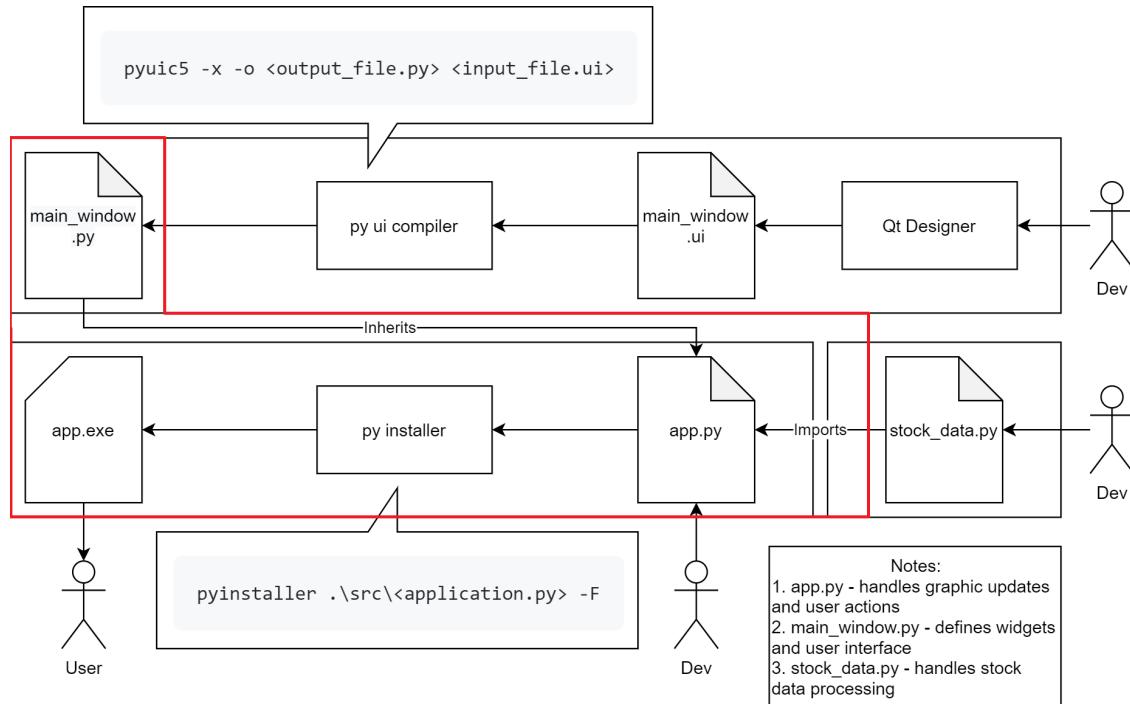
For example, if we want the **Update Window Button** to plot the stock prices in the GUI's canvas. We will have to create a **function** that plots the graph into the canvas and then connect the **Update Window Button** to this function.

However, before doing so, `app.py` must first know the **Widget names** defined in `main_window.py`.

For example, the **Update Window Button** is actually named: `updateWindowButton`. This name is defined on the previous section, when `main_window.ui` was designed using **Qt Designer** and the `objectName` is specified inside the Property Editor!

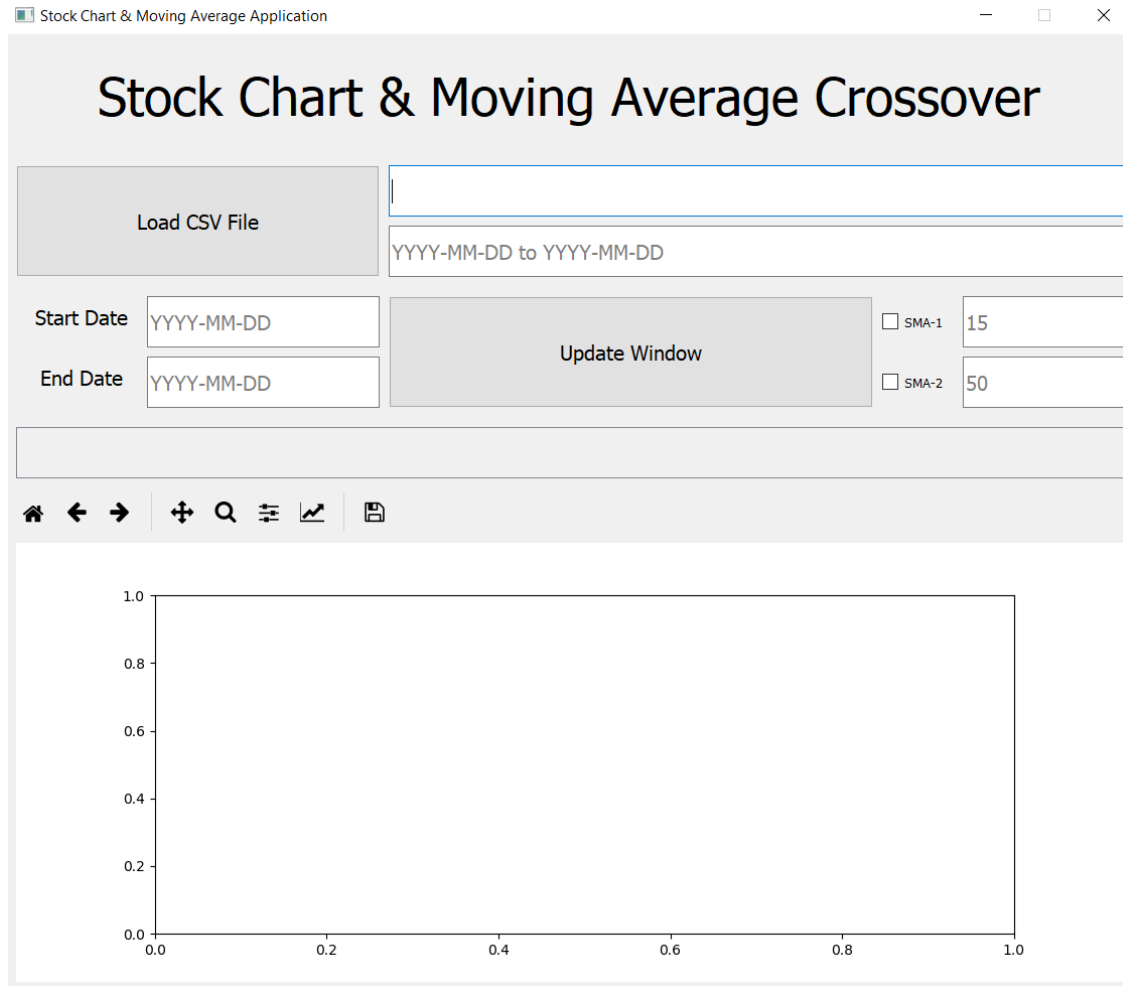
This is why, on the previous step, it is **recommended** to name the **Widgets accordingly!**

This section of the report will go through the 3 steps of developing `app.py` + 1 optional step to compile `app.exe`, as summarized in the graphics below.



6.1 Inheriting Widgets from `main_window.py`

The goal of this section is to ensure that `app.py` is **runnable without any error** and shows the **exact same GUI** as if previewing `main_window.ui`.



This result shows that `app.py` has successfully inherited all the properties of `main_window.py`, which includes all the `Widgets` defined when `main_window.ui` was created! These `Widgets` include `updateWindowButton`, `SMA1Checkbox`, `filePathEdit`, etc...

To achieve this, simply start from the generic starter code for all `PyQt5` application and then add the following:

1. Import `matplotlib`, `PyQt5` and the GUI's `Widget` class called `UI_Form` from `main_window`
2. Pass `QWidget` and `UI_Form` as argument to `Main` class to specify inheritance from `QWidget` and `UI_Form` class
3. Call the superclass' (`UI_Form`) initializing function and setup function
4. Finally, after the inherited GUI has been initialized, it is still possible to add other `Widgets` programmatically as well

This is exactly shown in the code below, running them should result in the image shown above:

```
[ ]: import sys
      from pathlib import Path
      from datetime import datetime
```

```

# Step 1
# standard matplotlib import statements
import matplotlib.pyplot as plt
import matplotlib.dates as mdates

# import matplotlib backend for Qt5
from matplotlib.backends.backend_qt5agg import FigureCanvasQTAgg as FigureCanvas
from matplotlib.backends.backend_qt5agg import NavigationToolbar2QT as N
    ↪NavigationToolbar

# standard PyQt5 import statements
from PyQt5 import QtCore as qtc
from PyQt5 import QtWidgets as qtw

# importing the class to be inherited from
from main_window import Ui_Form

# importing StockData processing module
from stock_data import StockData

class Main(qtw.QWidget, Ui_Form): # Step 2
    def __init__(self):
        # Step 3
        # calling Ui_Form's initializing and setup function
        super().__init__()
        self.setupUi(self)
        self.setWindowTitle("Stock Chart & Moving Average Application")

        # Step 4
        # sets up figure to plot on, instantiates canvas and toolbar
        self.figure, self.ax = plt.subplots()
        self.canvas = FigureCanvas(self.figure)
        self.toolbar = NavigationToolbar(self.canvas, self)

        # attaches the toolbar and canvas to the canvas layout
        self.canvasLayout.addWidget(self.toolbar)
        self.canvasLayout.addWidget(self.canvas)

        # sets up a scroll area to display GUI statuses
        self.scrollWidget = qtw.QWidget()
        self.scrollLayout = qtw.QVBoxLayout()
        self.scrollWidget.setLayout(self.scrollLayout)
        self.scrollArea.setWidget(self.scrollWidget)

    def function(self):
        # define new functions to do each new actions this way
        pass

```

```

if __name__ == "__main__":
    app = QtWidgets.QApplication([])
    main = Main()
    main.show()
    sys.exit(app.exec_())

```

Learning Point: Inheriting Widgets from main_window.py

When `main_window.ui` is converted into `main_window.py` using `pyuic5`, the `Widget` class called `Ui_Form` is created. This `Ui_Form` class has access to all the `Widgets` previously defined inside `main_window.ui` using `Qt Designer`! They're accessible to `Ui_Form` as regular python `Attributes`. e.g: `self.updateWindowButton`, etc... Thus, by inheriting from `Ui_Form`, `app.py`'s `Main` class can also access these `Widgets` through its `Attributes`. Likewise, `functions` defined in `Ui_Form` are also inherited and accessible to `Main`.

Learning Point: Defining & Adding Widgets programmatically

Sometimes, it is more convenient to define `Widgets` programmatically then through `Qt Designer`. As shown from the code snippet above, this is also possible and uses the **exact same core principles** as in `main_window.py` 1. Defining each `Widget` objects' and their names within the GUI. Exemplified with lines such as: `self.canvas = FigureCanvas(self.figure)` or similar instantiation line: `button = QPushButton('Button Name', self)` 2. Defining the location, size and other physical attributes of each `Widgets`. Exemplified with lines such as: `self.canvasLayout.addWidget(self.canvas)`

Now that `app.py` is able to access the `Widgets` defined in `main_window.py` by means of Python inheritance. It is now possible to implement `app.py`'s main responsibility:

1. Defining functions to accomplish certain actions
2. Connecting `Widget` actions to these functions

6.2 Defining functions in app.py

Before defining the `functions` in `app.py`, it is important to first be aware of the scope of each `functions` needed to execute the app's entire process. By referring to the User Manual's 5-step guide, it is possible to breakdown the entire app's functionalities into 3 major functions + 2 minor functions:

1. `load_data(self)` : invoked when Load CSV File Button is pressed
loads stock data .csv from inputted filepath string on the GUI as `StockData` object, also autocompletes all inputs using information provided by the csv. (Handles the actions from Step 1-2 of User Manual).
2. `update_canvas(self)` : invoked when Load Update Window Button is pressed
creates a datetime object from the inputted date string of format YYYY-MM-DD. uses it to slice a copy of loaded `stock_data` to be used to update graphics. checks

checkboxes first to see if SMA1, SMA2, Buy and Sell plots need to be drawn. finally, updates graphic accordingly. (Handles the actions from Step 3-5 of User Manual).

3. `plot_graph(self, column_headers, formats)` : invoked when `update_canvas` function is called

plots graphs specified under `column_headers` using the formats specified (Helps to handle the action from Step 5 of User Manual).

4. `report(self, string)` : invoked when any of the 3 major functions are called
given a report (string), update the scroll area with this report
5. `center(self)` : invoked when `__init__(self)` is called (i.e. during the startup of app)
centers the fixed main window size according to user screen size

The following part of the report will attempt to explain each of these 5 functions in detail. However, due to space limitation and the need for conciseness, only **parts of the code with its line number will be referenced!** We highly recommend that readers refer to the **full code in the Appendix or the python file itself should it become necessary.**

6.2.1 `load_data(self)`

First, this function attempts to parse the `text` specified by user in the Line Edit Widget called `filePathEdit` for a `filepath`.

```
102 filepath = Path(self.filePathEdit.text())
```

Learning Point: Getting Line Edit Widget Value

To extract the `string` value from Line Edit Widget, use: `.text()` method

The parsing of this `filepath` is outsourced to Python's `pathlib` library.

Learning Point: Using Path from `pathlib` to parse `filepath`

To parse the `filepath` from `string`, simply use the standard python `pathlib`. Instantiate a `Path` object by passing the `string` as follows: `Path(string)`. This guarantees that the resultant `filepath` follows the proper format that the computer OS uses.

Next, it will attempt to instantiate a `StockData` data object using this `filepath`. However, to prevent crashes due to invalid `filepath` or `.csv` file, it is important to wrap the previous instantiation line with a `try... except...`

```
104 try:
105     self.stock_data = StockData(filepath)
...
121 except IOError as e:
122     self.report(f"Filepath provided is invalid or fail to open .csv file. {e}")
123
124 except TypeError as e:
125     self.report(f"The return tuple is probably (nan, nan) because .csv is empty")
```

Each of this `except` corresponds to the the errors mentioned in the function's docstring line 96 to 100 (see Appendix).

Learning Point: Preventing Crashes with try... except...

To prevent crashes, simply encapsulate the line inside a try... except.... Each type of error can then be handled individually.

Once `StockData` has been initialized, the function attempts to get the `start_date` and `end_date` of the `stock_data` by `StockData`'s method called `get_period()`.

```
106     start_date, end_date = self.stock_data.get_period()
107     period = f"{start_date} to {end_date}"
```

Finally, the function will attempt to 'auto-complete' the various `Widgets` using information such as the `start_date` and `end_date`.

```
109     # auto-complete feature
110     self.startDateEdit.setText(start_date)
111     self.endDateEdit.setText(end_date)
112     self.periodEdit.setText(period)
113     self.SMA1Edit.setText("15")
114     self.SMA2Edit.setText("50")
115     self.SMA1Checkbox.setChecked(False)
116     self.SMA2Checkbox.setChecked(False)
```

Learning Point: Setting Widget Values Programmatically.

To set values to Widgets there are various methods specific to each type of Widget. Line Edit Widget uses `.setText(string)` whereas Checkbox Widget uses `.setChecked(bool)`.

6.2.2 update_canvas(self)

Similar to `load_data(self)`, this function begins by parsing an input. This time, the input is read from `startDateEdit` and `endDateEdit`. While `load_data(self)` attempts to parse `filepath`, `update_canvas(self)` is attempting to read `datetime`. Hence, python's standard `datetime` library is used:

```
150 try:
151     start_date = str(datetime.strptime(self.startDateEdit.text(), self.date_format).date())
152     end_date = str(datetime.strptime(self.endDateEdit.text(), self.date_format).date())
```

To convert a `datetime string` into a `datetime` object, the method `datetime.strptime(string, format)` can be used. However, it requires that the specified `string` follows a certain format, the chosen format is: `YYYY-MM-DD`, represented by:

```
148 self.date_format = '%Y-%m-%d'
```

Similar to `load_data(self)`, these functions are encapsulated inside a `try... except...` to prevent crashes and catch errors.

More detailed information about this `datetime` package can be found in the "Python Packages" section.

Learning Point: Parsing date string using datetime

To parse a datetime string into a datetime object, use the `datetime.strptime(string, format)` method. This method requires that the string specified follows a format. For YYYY-MM-DD, its format is represented as: `%Y-%m-%d`. Then finally, to return a datetime object in a certain format, simply use the object's method. In the application, `.date()` is used to return the datetime object with a YYYY-MM-DD format.

Unlike `load_data(self)` that attempts to simply process the entire `StockData`, the goal of `update_canvas` is to:

1. Determine a range of data to be plotted
2. Determine what columns of data to be plotted

The first goal is simple as the function has already parsed the `start_date` and `end_date` strings from their respective Line Edit Widgets using `datetime` package mentioned previously. All that is left is to call the `StockData`'s method that has been written to return a copy of the `DataFrame` for the specified range of data.

```
175     self.selected_stock_data = self.stock_data.get_data(start_date, end_date)
```

The second goal is a little more complex. The function needs to build a list of `column_headers` by checking whether or not the two SMA Checkbox Widgets are 'ticked' using the method `Checkbox.isChecked()`.

There are in total 3 different possibilities:

1. No Checkbox is ticked. Then, only the stock price under the `Close` header needs to be plotted. This means by default, the `Close` stock price data will always be plotted. Hence, the `column_headers` list is always instantiated with this value inside:

```
156     # builds a list of graphs to plot by checking the tickboxes
157     column_headers = ['Close']
```

2. Only 1 of the SMA Checkbox is ticked. Then, it is only necessary to calculate 1 SMA using the `StockData` method `_calculate_SMA(int)`, and append 1 `column_head` string into the `column_headers` list. Thus, we check for this condition using 2 `if` clauses, 1 for each SMA Checkbox Widget resulting in a `column_headers` list of length 2:

```
160     if self.SMA1Checkbox.isChecked():
161         self.stock_data._calculate_SMA(int(self.SMA1Edit.text()))
162         column_headers.append(f"SMA{self.SMA1Edit.text()}")
...
164     if self.SMA2Checkbox.isChecked():
165         self.stock_data._calculate_SMA(int(self.SMA2Edit.text()))
166         column_headers.append(f"SMA{self.SMA2Edit.text()}")
```

3. Both of the SMA Checkboxes are ticked. Then, 2 SMAs must be calculated and 2 `column_head` string must be appended. However, on top of these, SMA crossover data can now be calculated using the 2 SMA data with `_calculate_crossover(SMA1, SMA2, value)` resulting in 2 additional columns of signal data to be plotted called: `Buy` and `Sell`. This results in a `column_headers` list of length 5. We check for this condition by checking if the length of `column_headers` list is 3:

```
168     if len(column_headers) == 3:
```

```

169         self.stock_data._calculate_crossover(column_headers[1], column_headers[2], column_l
170         column_headers.append('Sell')
171         formats.append('rv')
172         column_headers.append('Buy')
173         formats.append('g^')

```

Finally, we can then plot these datapoints found in the `column_headers` according to specific `formats` by calling:

```

176     self.plot_graph(column_headers, formats)

```

The `formats` is also a list of string that tells `matplotlib` of the **marker type and color** of the different data plots. The process of building the `formats` list is exactly the same as `column_headers` list, and therefore, the length of the two lists **must always be the same** by the time line 176 is called.

Learning Point: Getting Checkbox Widget Value

*While Line Edit Widget uses the method `.text()` to get its **string** value. **Checkbox Widget** uses `.isChecked()` to get its current value which returns **boolean: True or False** depending whether the it is ‘ticked’ or not.*

Learning Point: matplotlib plot format strings

*Format strings inform matplotlib of both **color and type** of plot. Some common ones include: `k-`, where `k` tells matplotlib to color the plot black and the `-` tells matplotlib to plot the data as line graph. `ro` tells matplotlib to plot the data red and as scatter plot. Finally, `g^` tells matplotlib to use the green color and upper triangle for the scatter plot’s marker instead of a dot which the previous `o` command specifies.*

6.2.3 plot_graph(self, column_headers, formats)

This function implements the standard `matplotlib`’s method of plotting datapoints into an `Axes`.

First ensure that the `Axes` to plot on is cleared before a new plot is drawn by calling:

```

210 self.ax.clear()

```

This is to prevent multiple plots being plotted on the same `Axes` when the `Update Window Button` is pressed multiple times.

Next, prevent any crashing due to empty dataframe by using `assert` statement to raise error when such occasions do happen, for example: the user selects a start and end date containing no data points.

```

211 assert not self.selected_stock_data.empty

```

Learning Point: Clearing Axes

`Axes` is the plot area in which the datapoints are plotted. It is important to clear this area, otherwise multiple plots will be plotted in it. To clear it use the `.clear()` method.

Learning Point: Preventing Crashes with assert

*The **assert** keyword tests if a condition is true. If it is **NOT**, the program will raise an **AssertionError**. which can then be handled. This can be used to prevent crashes, in combination with **try... except** mentioned previously.*

Only after doing these checks, do we implement the plotting method which is simply just:

```
223         self.ax.plot(x_data, y_data, formats[i], label=column_headers[i])
```

This is the standard `matplotlib` function to use to plot any X-Y datas in an `Axes`.

For the `x_data`, we have the list containing dates of each prices. However, specifically for a time-series `x_data`, `matplotlib` does not accept `string` or `datetime` objects. Instead it has its own internal way of representing `datetime`. As such, it is mandatory to convert `datetime` objects into this internal representation with `mdates.date2num(datetime_list)`.

```
213 # matplotlib has its own internal representation of datetime
214 # date2num converts datetime.datetime to this internal representation
215 x_data = list(mdates.date2num(
216             [datetime.strptime(dates, self.date_format).date()
217              for dates in self.selected_stock_data.index.values]
218             ))
```

For the `y_data`, we can use anything as it is a simple stock price values. In this case, it is just a `list`. Furthermore, if we want to plot multiple datasets in the same `Axes`, we can simply call the method in line 223 mutiple times with different `y_data`. For example, we use loops to call `ax.plot()` on each `y_data` dataset of every `column_headers`:

```
220 for i in range(len(column_headers)):
221     if column_headers[i] in self.selected_stock_data.columns:
222         y_data = list(self.selected_stock_data[column_headers[i]])
223         self.ax.plot(x_data, y_data, formats[i], label=column_headers[i])``
```

Learning Point: The “Standard Way” of Plotting Using `matplotlib`

*The standard method of plotting using `matplotlib` is to use the method:
`ax.plot(x_data, y_data)`.*

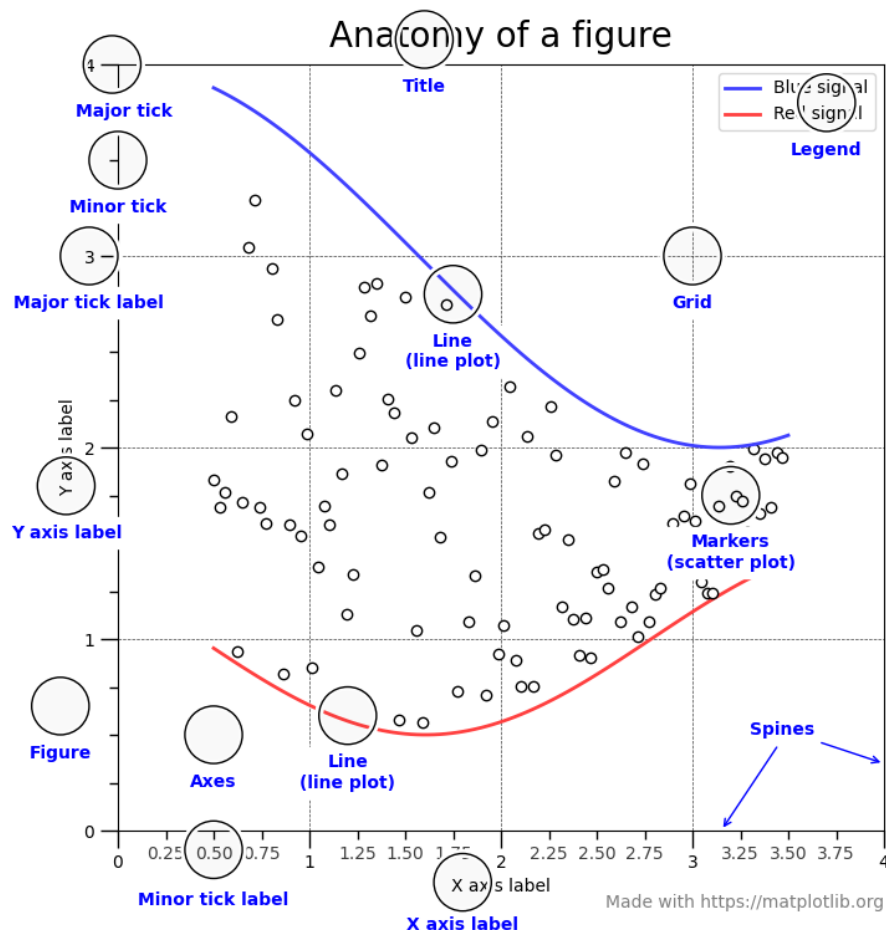
Once the plots are drawn, there may be some formatting that needs to be done on how either the `Axes` or the `Figure` looks like:

```
227 # formatting
228 months_locator = mdates.MonthLocator()
229 months_format = mdates.DateFormatter('%b %Y')
230 self.ax.xaxis.set_major_locator(months_locator)
231 self.ax.xaxis.set_major_formatter(months_format)
232 self.ax.format_xdata = mdates.DateFormatter(self.date_format)
233 self.ax.format_ydata = lambda y: '$%1.2f' % y
234 self.ax.grid(True)
235 self.figure.autofmt_xdate()
236 self.figure.legend()
237 self.figure.tight_layout()
238 self.canvas.draw()
```

Line 238 is important as it tells the GUI to redraw the plot itself with the new formatting!

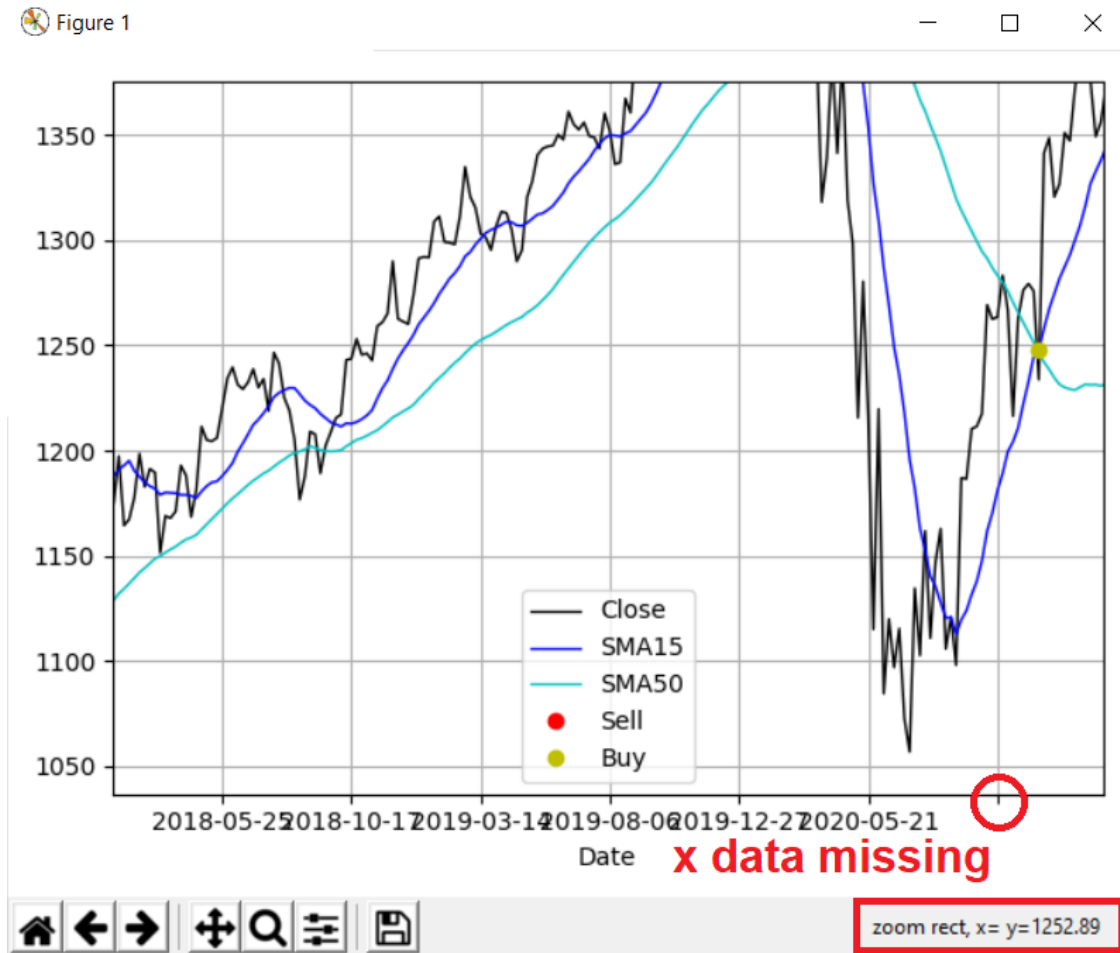
There are many components that are editable to make a plot looks just right! Thus, it is important to know what is in fact editable by understanding the parts of a **Figure**.

Learning Point: Anatomy matplotlib's Figure



*One important thing to note is that, the **Figure** encompasses the **Axes** and other things like the **legend**, **layout**, **title**, etc... Whereas the **Axes** of a **Figure** is just the area where the data are plotted! There can be multiple **Axes** to a single **Figure** but not the reverse!*

An alternative to this method is to simply call `Dataframe.plot(column_headers, formats)` on the **Dataframe** containing the selected data. However, this method requires that the format of the `x_data` is already in correct (in this case: `mdates`). Otherwise it will result in an inaccurate/missing `x_data` ticks. As shown here:



Which is why, using the standard method with `ax.plot()`, is recommended and chosen for this application as it guarantees a correct plot as the data are **explicitly** handled.

6.2.4 `report(self, string)`

This is a simple function to replicate the act of printing statements to terminal to check on the current progress of the code. It is not necessary to have this statement if the user is running the app using python. However, it is necessary to have it if the user runs the `.exe` file instead, because there is no terminal to see the progress of the app.

```
248 report_text = qtw.QLabel(string)
249 self.scrollLayout.addWidget(report_text)
250 print(string)
```

To simulate `print` statements, simply add new `Label Widget` with the `string` statement as its value. This is attached to a `Layout` that can be scrolled.

6.2.5 `center(self)`

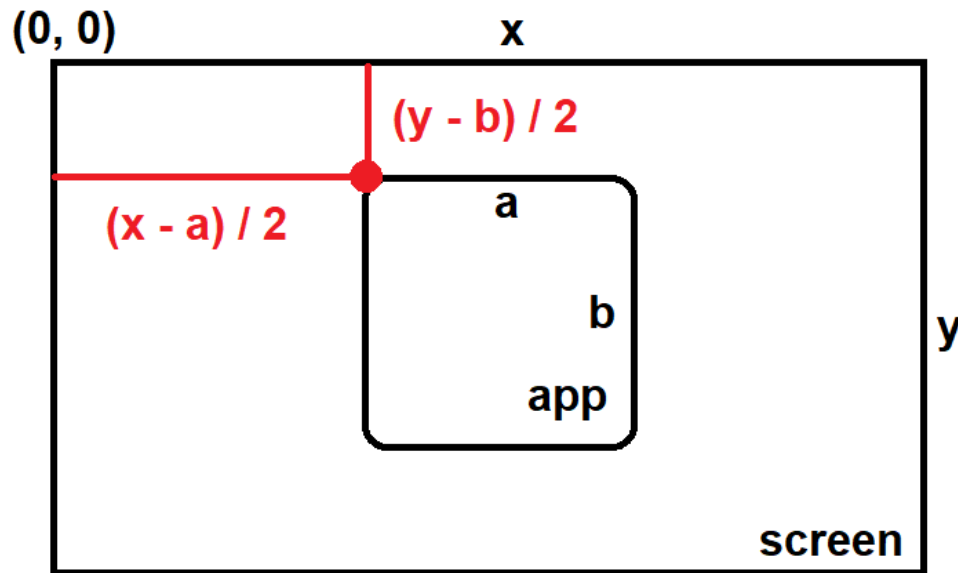
This method is called to programmatically center the main window of the app according to the screen size of the user's computer. First, the `screen` and app's `main_window` geometries are acquired.

```

256 screen = QtWidgets.QDesktopWidget().screenGeometry()
257 main_window = self.geometry()

```

Using the `width()` and `height()` methods, the values of the width and height of the two geometries can be acquired, and be used to calculate the center pixel. The following diagram illustrates this:



As such, we have the following `x` and `y` coordinates to move towards, using: `.move(x, y)` method.

```

258 x = (screen.width() - main_window.width()) / 2
259
260 # pulls the window up slightly (arbitrary)
261 y = (screen.height() - main_window.height()) / 2 - 50
262 self.setFixedSize(main_window.width(), main_window.height())
263 self.move(x, y)

```

Note: top-left corner is the zero coordinate. Hence, `- 50` pixel will pull the app's window up slightly.

6.3 Connecting Widget actions to functions

Fortunately, connecting `Widget` actions to `functions` are much simpler than defining the `functions`. These are all done inside the `__init__(self)` function. i.e. The app will attempt to connect these functions when it is first initialized/started by the user.

The method used to connect `Widgets` to `functions` is: `Widget.connect(function)`

Simply add the following code to the the starter code given in section: "Inheriting Widgets from `main_window.py`" to complete `app.py`.

```

__init__(self)

```

```

...
81 # button & checkbox connections
82 self.loadCSVButton.clicked.connect(self.load_data)
83 self.updateWindowButton.clicked.connect(self.update_canvas)
84 self.SMA1Checkbox.stateChanged.connect(self.update_canvas)
85 self.SMA2Checkbox.stateChanged.connect(self.update_canvas)
86
87 # auto-complete feauture
88 self.filePathEdit.setText("../data/GOOG.csv")

```

Learning Point: Connecting Widgets to functions

To connect Widgets to functions use the following method: `Widget.connect(function)`. This ensures that when users interact with the Widget e.g. by pressing Button, checking Checkbox, etc..., it will trigger the appropriate functions

6.4 (Optional) Compiling app.exe

To compile `app.py` application into an executable, first install `pyinstaller` using PIP by running the following command:

```
pip install pyinstaller
```

Having installed `pyinstaller`, then use the following command from `root` folder:

```
pyinstaller .\src\app.py -F
```

The `app.exe` file can be found inside the `dist` folder.

Note: the above command assumes that all source code (such as `app.py`, `stock_data.py` and `main_window.py`) are all found inside the `src` folder!

`app.exe` is a binary executable file for Windows (not Mac!). It allows users to simply double-click this file to start the application without requiring installation of any python modules at all.

Learning Point: Compiling Python Modules into an .exe

PyInstaller is a standard package to bundle a Python application and all of its dependencies into a single executable. The user can then run the packaged app without installing a Python interpreter or any modules. However, this is only possible for Windows!



7 Appendix

7.1 Code Reference

```
[1]: import sys
sys.path.insert(1, '../src')

from app import Main
from stock_data import StockData
import inspect # standard library used later to get info about the source code

def print_code(code): # prints '{line} {code}' with 2 less indent and without
    → the def header
    codeline = lambda code, start : [(start + 1 + i, code[i]) for i in
    → range(len(code))]
        print("".join([f"{line} {text[2:]}" if len(text) > 1 else f"{line} {text}"
    → for line, text in codeline(code[0][1:], code[1])])])
```

7.1.1 app.py

```
__init__(self)
[2]: print_code(inspect.getsourcelines(Main.__init__)[0])

59 """
60 initializes and sets up GUI widgets and its connections
61 """
62 super().__init__()
63 self.setupUi(self)
64 self.setWindowTitle("Stock Chart & Moving Average Application")
65
66 # sets up figure to plot on, instantiates canvas and toolbar
67 self.figure, self.ax = plt.subplots()
68 self.canvas = FigureCanvas(self.figure)
69 self.toolbar = NavigationToolbar(self.canvas, self)
70
71 # attaches the toolbar and canvas to the canvas layout
72 self.canvasLayout.addWidget(self.toolbar)
73 self.canvasLayout.addWidget(self.canvas)
74
75 # sets up a scroll area to display GUI statuses
76 self.scrollWidget = qtw.QWidget()
77 self.scrollLayout = qtw.QVBoxLayout()
78 self.scrollWidget.setLayout(self.scrollLayout)
79 self.scrollArea.setWidget(self.scrollWidget)
80
81 # button & checkbox connections
82 self.loadCSVButton.clicked.connect(self.load_data)
83 self.updateWindowButton.clicked.connect(self.update_canvas)
```

```

84 self.SMA1Checkbox.stateChanged.connect(self.update_canvas)
85 self.SMA2Checkbox.stateChanged.connect(self.update_canvas)
86
87 # auto-complete feauture
88 self.filePathEdit.setText("../data/GOOG.csv")

```

```
load_data(self)
```

```
[3]: print_code(inspect.getsourcelines(Main.load_data))
```

```

91 """
92 loads stock data .csv from inputted filepath string on the GUI
93 as StockData object, also autocompletes all inputs
94 using information provided by the csv.
95
96 Error handling
97     invalid filepath :
98         empty filepath or file could not be found.
99     invalid .csv :
100         .csv file is empty, missing date column, etc.
101 """
102 filepath = Path(self.filePathEdit.text())
103
104 try:
105     self.stock_data = StockData(filepath)
106     start_date, end_date = self.stock_data.get_period()
107     period = f"{start_date} to {end_date}"
108
109     # auto-complete feauture
110     self.startDateEdit.setText(start_date)
111     self.endDateEdit.setText(end_date)
112     self.periodEdit.setText(period)
113     self.SMA1Edit.setText("15")
114     self.SMA2Edit.setText("50")
115     self.SMA1Checkbox.setChecked(False)
116     self.SMA2Checkbox.setChecked(False)
117
118     self.report(f"Data loaded from {filepath}; period auto-selected:
119 {start_date} to {end_date}.")
120     print(self.stock_data.data)
121
122 except IOError as e:
123     self.report(f"Filepath provided is invalid or fail to open .csv file.
124 {e}")
125
126 except TypeError as e:
127     self.report(f"The return tuple is probably (nan, nan) because .csv is

```

```
empty")
```

```
update_canvas(self)
```

```
[4]: print_code(inspect.getsourcelines(Main.update_canvas))
```

```
128 """
129 creates a datetime object from the inputted date string
130 of format YYYY-MM-DD. uses it to slice a copy of loaded
131 stock_data to be used to update graphics. checks
132 checkboxes first to see if SMA1, SMA2, Buy and Sell plots
133 need to be drawn. finally, updates graphic accordingly.
134
135 Error handling
136 invalid date format:
137     date format inside the .csv file is not YYYY-MM-DD
138 non-existent stock_data :
139     the selected range results in an empty dataframe
140     or end date < start date
141 non-existent data point :
142     data of that date does not exist,
143     or maybe because it is Out-Of-Bound
144 raised exceptions :
145     SMA1 and SMA2 values are the same,
146     or other exceptions raised
147 """
148 self.date_format = '%Y-%m-%d'
149
150 try:
151     start_date = str(datetime.strptime(self.startDateEdit.text(),
self.date_format).date())
152     end_date = str(datetime.strptime(self.endDateEdit.text(),
self.date_format).date())
153     period = f"{start_date} to {end_date}"
154     self.periodEdit.setText(period)
155
156     # builds a list of graphs to plot by checking the tickboxes
157     column_headers = ['Close']
158     formats = ['k-']
159
160     if self.SMA1Checkbox.isChecked():
161         self.stock_data._calculate_SMA(int(self.SMA1Edit.text()))
162         column_headers.append(f"SMA{self.SMA1Edit.text()}")
163         formats.append('b-')
164     if self.SMA2Checkbox.isChecked():
165         self.stock_data._calculate_SMA(int(self.SMA2Edit.text()))
166         column_headers.append(f"SMA{self.SMA2Edit.text()}")
```

```

167         formats.append('m-')
168     if len(column_headers) == 3:
169         self.stock_data._calculate_crossover(column_headers[1],
column_headers[2], column_headers[1])
170         column_headers.append('Sell')
171         formats.append('rv')
172         column_headers.append('Buy')
173         formats.append('g^')
174
175     self.selected_stock_data = self.stock_data.get_data(start_date,
end_date)
176     self.plot_graph(column_headers, formats)
177
178     self.report(f"Plotting {column_headers} data from period: {start_date}
to {end_date}.")
179     print(self.selected_stock_data)
180
181 except ValueError as e:
182     self.report(f"Time period has not been specified or does not match YYYY-
MM-DD format, {e}.")
183
184 except AssertionError as e:
185     self.report(f"Selected range is empty, {e}")
186
187 except KeyError as e:
188     self.report(f"Data for this date does not exist: {e}")
189
190 except Exception as e:
191     self.report(f"Exception encountered: {e}")

```

```

plot_graph(self, column_headers, formats)

```

```

[5]: print_code(inspect.getsourcelines(Main.plot_graph))

```

```

194 """
195 plots graphs specified under column_headers using the formats
196
197 Parameters
198 column_headers : [str, str, ...]
199     a list containing column header names with data to be plotted
200 formats : [str, str, ...]
201     a list of matplotlib built-in style strings to indicate
202     whether to plot line or scatterplot and the colours
203     corresponding to each value in col_headers
204     (hence, must be same length)
205
206 Error handling

```

```

207 empty dataframe :
208     selected dataframe is empty
209 """
210 self.ax.clear()
211 assert not self.selected_stock_data.empty
212
213 # matplotlib has its own internal representation of datetime
214 # date2num converts datetime.datetime to this internal representation
215 x_data = list(mdates.date2num(
216                 [datetime.strptime(dates,
self.date_format).date()
217                 for dates in
self.selected_stock_data.index.values]
218                 ))
219
220 for i in range(len(column_headers)):
221     if column_headers[i] in self.selected_stock_data.columns:
222         y_data = list(self.selected_stock_data[column_headers[i]])
223         self.ax.plot(x_data, y_data, formats[i],
label=column_headers[i])
224         self.report(f"{column_headers[i]} data is being plotted.")
225     else: self.report(f"{column_headers[i]} data does not exist.")
226
227 # formatting
228 months_locator = mdates.MonthLocator()
229 months_format = mdates.DateFormatter('%b %Y')
230 self.ax.xaxis.set_major_locator(months_locator)
231 self.ax.xaxis.set_major_formatter(months_format)
232 self.ax.format_xdata = mdates.DateFormatter(self.date_format)
233 self.ax.format_ydata = lambda y: '$%1.2f' % y
234 self.ax.grid(True)
235 self.figure.autofmt_xdate()
236 self.figure.legend()
237 self.figure.tight_layout()
238 self.canvas.draw()

```

```
report(self, string)
```

```
[6]: print_code(inspect.getsourcelines(Main.report))
```

```

241 """
242 given a report (string), update the scroll area with this report
243
244 Parameters
245 string : str
246     string of the report, usually the error message itself.
247 """

```

```

248 report_text = qtw.QLabel(string)
249 self.scrollLayout.addWidget(report_text)
250 print(string)

```

```
center(self)
```

```
[7]: print_code(inspect.getsourcelines(Main.center))
```

```

253 """
254 centers the fixed main window size according to user screen size
255 """
256 screen = qtw.QDesktopWidget().screenGeometry()
257 main_window = self.geometry()
258 x = (screen.width() - main_window.width()) / 2
259
260 # pulls the window up slightly (arbitrary)
261 y = (screen.height() - main_window.height()) / 2 - 50
262 self.setFixedSize(main_window.width(), main_window.height())
263 self.move(x, y)

```

7.1.2 stock_data.py

```
__init__(self)
```

```
[8]: print_code(inspect.getsourcelines(StockData.__init__))
```

```

18 """
19 initializes StockData object by parsing stock data .csv file into a dataframe
20 (assumes 'Date' column exists and uses it for index),
21 also checks and handles missing data
22
23 Parameters
24 filepath : str
25     filepath to the stock data .csv file, can be relative or absolute
26
27 Raises
28 IOError :
29     failed I/O operation, e.g: invalid filepath, fail to open .csv
30 """
31 self.filepath = filepath
32 self.data = pd.read_csv(filepath).set_index('Date')
33 self.check_data()

```

```
check_data(self, overwrite=True)
```

```
[9]: print_code(inspect.getsourcelines(StockData.check_data))
```

```

36 """
37 checks and handles missing data by filling in missing values by interpolation
38
39 Parameters
40 overwrite : bool (True)
41     if True, overwrites original source stock data .csv file
42
43 Returns
44 self : StockData
45 """
46 # function to fill in missing values
47 # by averaging previous data and after (interpolation)
48 self.data = self.data.interpolate()
49 self.data.to_csv(self.filepath, index=overwrite)
50 return self

```

`get_data(self, start_date, end_date)`

```
[10]: print_code(inspect.getsourcelines(StockData.get_data))
```

```

53 """
54 returns a subset of the stock data from start_date to end_date inclusive
55
56 Parameters
57 start_date : str
58     start date of stock data range, must be of format YYYY-MM-DD
59 end_date : str
60     end date of stock data range, must be of format YYYY-MM-DD
61
62 Returns:
63 selected_data : DataFrame
64     stock data dataframe indexed from specified start to end date inclusive
65
66 Raises
67 KeyError :
68     data for this date does not exist
69 AssertionError :
70     selected range is empty
71 """
72 self.selected_data = self.data[str(start_date):str(end_date)]
73 return self.selected_data

```

`get_period(self)`

```
[11]: print_code(inspect.getsourcelines(StockData.get_period))
```

```

76 """

```

```

77 returns a string tuple of the first and last index
78 which make up the maximum period of StockData
79
80 Returns
81 period : (str, str)
82
83 Raises
84 TypeError :
85     the return tuple is probably (nan, nan) because .csv is empty
86 """
87 index = list(self.data.index)
88 (first, last) = (index[0], index[-1])
89 return (first, last)

```

```

    _calculate_SMA(self, n, col='Close')

```

```

[12]: print_code(inspect.getsourcelines(StockData._calculate_SMA))

```

```

92 """
93 calculates simple moving average (SMA) and augments the stock dataframe
94 with this SMA(n) data as a new column
95
96 Parameters
97 n : int
98     the amount of stock data to use to calculate average
99 col : str ('Close')
100     the column head title of the values to use to calculate average
101
102 Returns
103 self : StockData
104 """
105 col_head = f'SMA{n}'
106 if col_head not in self.data.columns:
107     sma = self.data[col].rolling(n).mean()
108     self.data[f'SMA{n}'] = np.round(sma, 4)
109     self.data.to_csv(self.filepath, index=True)
110 return self

```

```

    _calculate_crossover(self, SMA1, SMA2, col='Close')

```

```

[13]: print_code(inspect.getsourcelines(StockData._calculate_crossover))

```

```

113 """
114 calculates the crossover positions and values,
115 augments the stock dataframe with 2 new columns
116 'Sell' and 'Buy' containing the value at which SMA crossover happens
117

```



```

118 Parameters
119 SMA1 : str
120     the first column head title containing the SMA values
121 SMA2 : str
122     the second column head title containing the SMA values
123 col : str ('Close')
124     the column head title whose values will copied into 'Buy' and 'Sell'
125     columns to indicate crossovers had happen on that index
126
127 Returns
128 self : StockData
129
130 Raises
131 Exception :
132     SMA1 and SMA2 provided are the same, they must be different
133 """
134 if SMA1 < SMA2: signal = self.data[SMA1] - self.data[SMA2]
135 elif SMA1 > SMA2: signal = self.data[SMA2] - self.data[SMA1]
136 else: raise Exception(f"{SMA1} & {SMA2} provided are the same. They must be
different SMA.")
137
138 signal[signal > 0] = 1
139 signal[signal <= 0] = 0
140 diff = signal.diff()
141
142 self.data['Sell'] = np.nan
143 self.data['Buy'] = np.nan
144 self.data.loc[diff.index[diff < 0], 'Sell'] = self.data.loc[diff.index[diff
< 0], col]
145 self.data.loc[diff.index[diff > 0], 'Buy'] = self.data.loc[diff.index[diff >
0], col]
146
147 self.data.to_csv(self.filepath, index=True)
148 return self

```

plot_graph(self, col_headers, style, ax, show=True)

```
[14]: print_code(inspect.getsourcelines(StockData.plot_graph))
```

```

151 """
152 plots columns of selected values as line plot and/or columns of values
153 as scatter plot as specified by style to an Axes object
154
155 Parameters
156 col_headers : [str, str, ...]
157     a list containing column header names whose data are to be plotted
158 style : [str, str, ...]

```

```

159     a list of matplotlib built-in style strings to indicate whether to plot
160     line or scatterplot and the colours corresponding to each value in
161     col_headers (hence, must be same length)
162 ax : Axes
163     matplotlib axes object on which the plot will be drawn
164
165 Raises
166 AttributeError :
167     self.selected_data has not been specified,
168     call StockData.get_data(start, end) before plotting
169 AssertionError :
170     self.selected_data is empty, perhaps due to OOB or invalid range
171 """
172 assert not self.selected_data.empty
173 self.selected_data[col_headers].plot(style=style,
174                                     ax=ax,
175                                     grid=True,
176                                     x_compat=True,
177                                     linewidth=1)
178 if show: plt.show()

```

calculate_SMA(self, n)

```
[15]: print_code(inspect.getsourcelines(StockData.calculate_SMA))
```

```

181 """
182 calculates simple moving average (SMA) and augments the stock dataframe
183 with this SMA(n) data as a new column
184
185 Parameters
186 n : int
187     the amount of stock data to use to calculate average
188 col : str ('Close')
189     the column head title of the values to use to calculate average
190
191 Returns
192 self : StockData
193 """
194 col_head = 'SMA' + str(n)
195 df = self.data.reset_index()
196
197 if col_head not in df.columns:
198     # Extract full dataframe from the actual data
199     # (to check if there is enough data for sma)
200     dateList = self.data.index.values.tolist()
201     returnList = []
202     for date in dateList: # for date in dateList

```

```

203     # find the index of date in the full data
204         dateIndex = df[df["Date"]==date].index.values[0]
205         if dateIndex < n: # if date index is less than n: append None
206             returnList.append(np.nan)
207         else:
208             sum = 0
209             for i in range(n):
210                 sum += df.iloc[dateIndex-i]["Close"]
211             # append the SMA for each day to a list
212             returnList.append(sum/n)
213
214     self.data[col_head] = returnList
215     print(self.data)
216     self.data.to_csv(self.filepath, index=True)
217
218 return self

```

calculate_crossover(self, SMAa, SMAb)

```
[16]: print_code(inspect.getsourcelines(StockData.calculate_crossover))
```

```

221 """
222 calculates the crossover positions and values,
223 augments the stock dataframe with 2 new columns
224 'Sell' and 'Buy' containing the value at which SMA crossover happens
225
226 Parameters
227 SMA1 : str
228     the first column head title containing the SMA values
229 SMA2 : str
230     the second column head title containing the SMA values
231 col : str ('Close')
232     the column head title whose values will copied into 'Buy' and 'Sell'
233     columns to indicate crossovers had happen on that index
234
235 Returns
236 self : StockData
237
238 Raises
239 Exception :
240     SMA1 and SMA2 provided are the same, they must be different
241 """
242 col_head1 = 'Position'
243 col_head2 = 'Signal'
244 col_head3 = 'Buy'
245 col_head4 = 'Sell'
246 df = self.data

```

```

247
248 # to ensure the correct number of elements in the loop
249 SMAlist = self.data.index.values.tolist()
250 # extracts the SMA from the specific column in self.data
251 if SMAa < SMAb:
252     SMA1 = df[SMAa].tolist()
253     SMA2 = df[SMAB].tolist()
254 elif SMAa > SMAb:
255     SMA1 = df[SMAB].tolist()
256     SMA2 = df[SMAa].tolist()
257 else: # SMAa == SMAB
258     raise ValueError(f"Given {SMAa} & {SMAB} are the same. Must be different
SMA.")
259
260 stockPosition = [] # which SMA line is on top
261 stockSignal = [] # the buy/sell signal --> the 1s and -1s
262 buySignal = [] # filtered out location of buy signals
263 sellSignal = [] # filtered out location of sell signals
264
265 # goes through every element
266 for i in range(len(SMAlist)):
267     if SMA1[i] > SMA2[i]: stockPosition.append(1) # SMA1 above SMA2
268     elif SMA1[i] < SMA2[i]: stockPosition.append(0) # SMA2 above SMA1
269     # if the SMAs are equal, repeat the previous entry
270     # because no crossover has occurred yet
271     elif SMA1[i] == SMA2[i]: stockPosition.append(stockPosition[i-1])
272     else: stockPosition.append(np.nan) # if no data, leave blank
273
274 # find the places where crossover occurs
275 for j in range(len(stockPosition)):
276     # 'shifts' the data one period to the right
277     # to ensure crossovers are reflected on the correct date
278     if j == 0: stockSignal.append(np.nan)
279     # calculation for the crossover signals
280     else: stockSignal.append(stockPosition[j] - stockPosition[j-1])
281
282
283 for k in range(len(stockSignal)): # finding location of buy signals
284     if stockSignal[k] == 1:
285         value = self.data[SMAa].tolist()[k]
286         buySignal.append(value)
287     else: buySignal.append(np.nan) # if no signal leave blank
288
289 for k in range(len(stockSignal)): # finding location of sell signals
290     if stockSignal[k] == -1:
291         value = self.data[SMAa].tolist()[k]
292         sellSignal.append(value)
293     else: sellSignal.append(np.nan) # if no signal leave blank

```

```
294
295 self.data[col_head3] = buySignal
296 self.data[col_head4] = sellSignal
297
298 print(self.data)
299 self.data.to_csv(self.filepath, index=True)
300 return self
```