

What are the goals?

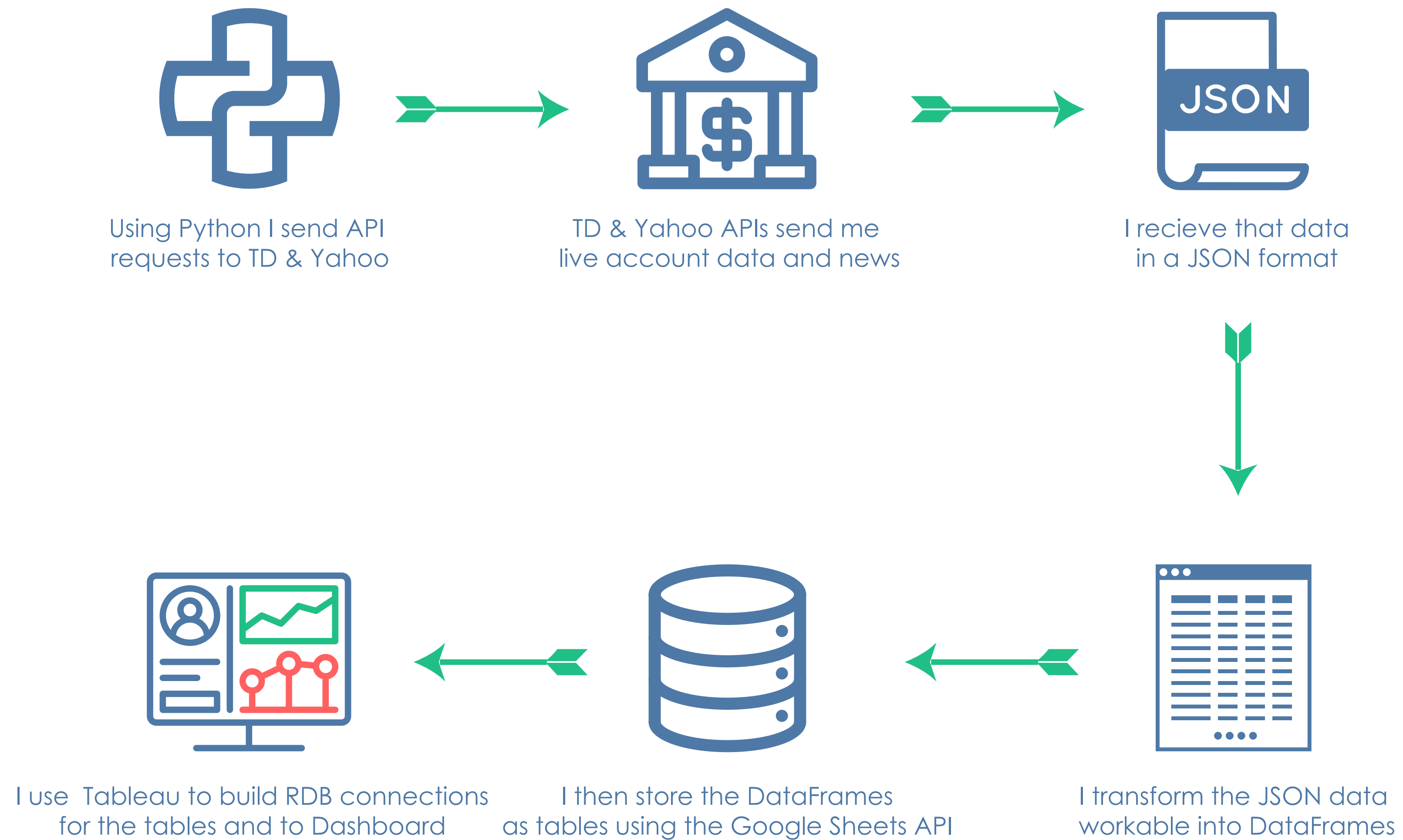
Goals:

- Analyze investment assets at a glance
- Identify potentially risky positions
- Give context to asset movements

Tools of the Trade:

- Python/Pandas (ETL)
- Google Sheets (database)
- TD Ameritrade API (live account data)
- Yahoo Finance API (Gainers/Losers news articles)
- Tableau (RDB connections + data viz)

How does the data flow?



What does this supply?



Dashboard that provides:
Portfolio Value: The account's net liquidity.

Beta Measurement: A measure of a stock's volatility in relation to the overall market.

1 Day 1 Minute Chart: Shows the movement of a particular stock throughout the day.

% P/L Day: This shows the percent change of a stock's value over the day.

Gainers & Losers: These are the top 6 stocks that have moved today.

Weight & Risk: These are flagged positions brought up according to the position weight and volatility.

News: This portion of the dashboard relays context on the Top Gainers/Top Losers.

Symbol Selector: This allows for filtering directly to a specific stock ticker