**GROUP PROJECT 1**

**TEAM MEMBERS:** Chris, Christopher, Jacob, Kim, & Val

**TOPIC:** Set up an application (the backend) that helps smaller retail investors/traders with data analysis and graphical output to help them make better investment decisions. Analysis would include portfolio optimization (Sharpe Ratio, Beta, Return, Correlations, etc). The application would also provide time series data on historical valuation benchmarked to index to help investor understand potentially over-valued and under-valued positions. Finally, the app would include an interactive tool that notifies investor about sell or buy thresholds in real time based upon their investor preferences/risk aversion.

**DATA SOURCES:** Yahoo Finance, Alpaca, IBES and/or FactSet (dependent upon access to Rotman databases).

**PLOTTING TECHNOLOGIES:** Hvplot, Plotly, Pandas

**RESPONSIBILITIES**

1. Final Presentation Write-Up: Kim (Nov 11)
2. GITHUB Mgr: Jacob (Current)
3. Coding Tasks:
   1. APIs, Pandas: Jacob, Chris
   2. Graphing: Kim, Val
   3. Stock Guidance: Val
4. Competitive Analysis: Christopher (i.e. look at any other apps & price points)
5. Exit Strategy:

**NEXT STEPS/FUTURE RECOMMENDATIONS**: automate purchase/sale/rebalance portfolio and pushes this decision to a real trading application such as Wealthsimple or Quest Trade.

**PRESENTERS:** All team members.