**Project 1 Proposal**

For the first project we wanted to look at how different investment styles have performed over the last 3-5 years and then project forward how they may perform over the next 5 years. Rather than creating the portfolios ourselves for a few different strategies, we are going to look at common strategies that are used to make ETFs from S&P, Vanguard, BMO and Blackrock and compare them to each other and then take the average of those to compare the strategies themselves to each other in the end to prepare our dashboard to present. The strategies that we are going to look at are:

Table

Description automatically generated

We will import the data for each portfolio using a common ETF found from each of S&P, Vanguard, BMO and Blackrock iShares for each strategy that we have. (ie. For portfolio A we would import in a common ETF from each company for Mid Cap stocks, Dividend Stocks, and Corporate Bonds). Once we have the data in our notebooks and cleaned up, we can then compare how each company’s ETF has performed to each other on a monthly basis over the last 3 years and plot that. (ie. BMO’s mid cap vs Vanguard’s mid cap). Once we have compared each strategy we can aggregate them to find the average returns for each strategy using the data from each of the ETF companies. Once we have the average from each strategy we can then bring all of the data together to compare how each strategy has performed relative to the others over the last 3 years to determine which strategy has done the best. We can also perform a Monte Carlo simulation (API) to project forwards for the next 3 years which strategy may give the best returns for the future using the average data from each of the ETF companies.