

Release Plan

Product name: Backtesting Engine

Team name: Quant

Release name: Backtesting Engine

Revision number: 3

Revision Date: October 27, 2025

priority: 1 low 5 high

High level goals: Software that helps beginners make more informed stock decisions and using pre made strategies against past information to better inform future financial decisions on strategy based stocks. For the MVP of our website we plan to create a gamified education roadmap to educate our users on stock strategies. I.e. level one would be foundations, understanding markets stocks and what backtesting means.

Level two would be explaining the buy and hold strategy (the simplest stock strategy) which is buying at one date and selling at the second date. As we build more levels we may transition into creating your own strategies and perhaps providing more tools for that but keeping things simple and friendly.

- Sprint 1 plan: Basic infrastructure + environment setup
 - User stories:
 - As a user I want to see a landing page with about, and product page
 - As a user I want to be able to sign up and login to my simple strategies account and see my profile with my name, photo and email
 - Create a basic progress chart showing completeness.
 - As a developer, I want to set up Git so that code changes are tracked and managed collaboratively.
 - As a developer, I want to set up VS Code with necessary extensions so that I can code efficiently.
 - As a developer, I want to choose a tech stack so that development can begin with consistent tools.
 - As a user, I want a variety of strategies to be able to test such as
 - Buy and hold
 - Monthly DCA
 - N-day moving average filter
 - two-man crossover
 - breakout
 - momentum
 - rsi threshold
 - mean-reversion band

- trailing stop overlay
 - take-profit / stop-loss overlay
 - rebalance to target weight
 - calendar/schedule entry
- choose deployment
 - As a developer, I want to deploy to Vercel so that users can access the app online.
- storage
 - As a developer, I want to set up Supabase for authentication and storage so that I can manage user data easily.
- Sprint 2 : I Defining and implementing an MVP
 - As a user, I want to learn about stocks and what kind of stocks there are.
 - As a user, I want to test my knowledge after learning what a stock is.
 - Overflow:
 - As a user, I want to test to learn what stock strategies are and how they can benefit me.
 - As a user, I want to learn what different kinds of stock strategies there are and what they look like.
- Sprint 3 : adding more features and polish
 - As a user, I want to learn more about stock strategies through curated content so that I can deepen my financial literacy. (more levels)
 - As a user, I want to be able to progress through levels and see my progress on the portfolio page
 - As a user learning more about strategies, I want to be able to visualize the results of a buy-and-hold strategy on a certain stock
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- Sprint 4 : final testing and release
 - As a user, I want to run Monte Carlo simulations on my modified strategies so that I can assess their robustness and variability.
 - As a user, I want to see related news articles about the stocks and strategies I'm viewing so that I can understand current market context.
 - As a user, I want to interact with a chatbot or wizard that can answer my questions contextually so that I can get guidance while using the platform.
- Backlog:
 - As a user, I want to earn levels based on my learning or backtesting activity so that I feel a sense of progress and achievement.

- As a user, I want to view detailed progress charts that visualize my learning, testing, and strategy development milestones so that I can monitor my journey clearly.