**Finance-And-Risk-Analytics**

**Problem Statement:**

The wealth management industry has grown significantly, leading to the emergence of portfolio managers who help individuals and businesses make investment decisions. Portfolio managers work with analysts to create suitable investment portfolios. However, they face competition and must use available resources effectively. In a case scenario, you're tasked with providing investment consultation to two investors, Mr. Patrick Jyenger and Mr. Peter Jyenger, based on their unique financial objectives.

**Solution Approach:**

The following is a summary of the key steps and processes involved in solving this problem:

**\* Data Gathering:**

To address the challenge, we initially gathered data on 24 different stocks from four different sectors, as well as data from the S&P 500.

**\* Data Preprocessing:**

Python was used to clean the dataset, removing any discrepancies and ensuring it was in a suitable format for analysis.

**\* Data Visualization:**

We leveraged the preprocessed data to generate Power BI reports for each sector. These reports allowed us to visualize and compare the performance of different stocks within each sector.

**\* Metric Calculation:**

Using Python, we calculated various metrics such as average daily return, average risk, annualized risk, annualized return, cumulative return, and Sharpe ratio. These metrics formed the basis for our investment decision-making process.

**\* Portfolio Selection:**

Based on the calculated metrics and careful analysis, we handpicked stocks that aligned with the specific financial objectives of Mr. Patrick Jyenger and Mr. Peter Jyenger. This resulted in the creation of tailored investment portfolios designed to meet their needs.

**\* Presentation:**

Finally, we created a comprehensive presentation that showcases all our findings and the rationale behind our stock selections. This presentation serves as a transparent and informative resource for our clients.