

# MINUTES FOR 1<sup>ST</sup> CLIENT MEETING [1/2022]

## 1. MEETING DETAILS

Chairperson: Ratthapark Arnantayakan

Secretary: Lei Huang

Date: 8 March 2022

Time: 5:00 – 7:00 PM

Location: Library of the University of Adelaide

## 2. ATTENDEES

Ratthapark Arnantayakan	(Gavin)	a1829241
Lei Huang	(Mario)	a1820323
Tamarakuro Joseph Aduwari	(Joseph)	a1814359
Junlin Wang	(Grayson)	a1761503

Client:

Roberto Espinoza Valenzuela

## 3. ABSENCES

*-None-*

## 4. SUMMARY OF PREVIOUS MEETING

Team discussed and exchanged on stock screeners in general and shared their experiences in backend and frontend technologies. In addition, team also prepared a list of relevant questions to ask client to fully understand the project requirements.

## 5. GROUP MILESTONE

### 5.1 Overview

Client started the meeting by giving an introduction of the project. Subsequently, he explained the project requirements which focused on backend development especially database structure. Also, the general concepts of screening criteria was given which can be divided into three steps including relative strength, technical criteria and fundamental criteria. At the end of the meeting, team asked a number of questions regarding source of data, screening criteria and technologies to be used in the project.

### 5.2 Presentation

*-None-*

## 6. INDIVIDUAL MILESTONE

*Ratthapark Arnantayakan (Gavin) a1829241*

Asked client about the financial data to be used in the project specifically stock indexes and clarified the meaning of relative strength and how it can be used to screen stocks.

*Lei Huang (Mario) a1820323*

Raised some general questions about this project: some similar product to learn, and some technical problems we may facing in this project.

*Tamarakuro Joseph Aduwari (Joseph) a1814359*

Discussed technical requirements with the client: option of the coding language, and requirements on the backend structure.

*Junlin Wang (Grayson) a1761503*

Asked client on project timeline and preferred channel of communication

## **7. PROJECT MANAGEMENT**

- Schedule Team meeting at 5-7pm on Tuesday 10 March 2022 via Zoom.

## **8. REQUIREMENTS ELICITATION**

### *8.1 Database structure*

Discussed on the required structure for the database. Client will follow up by sending detailed requirements on database structure

### *8.2 Backend Application*

Client showed example of backend application in Python and could send to team after clearing NDA

### *8.3 Screening functions*

Screening functions can be divided into three parts including relative strength, technical criteria and fundamental criteria. Client will send more details on screening criteria.

### *8.5 User Interface*

Client stated that user interface is not the main focus of the project and suggested that the result can be exported and displayed in excel file.

## **9. ADJOURNMENT**

- The meeting ended at 7:00pm.
- The next meeting is a team meeting and will be held via Zoom at 5:00pm on Thursday 10 March 2022.