

MINUTES FOR 5th CLIENT MEETING [5/2022]

1. MEETING DETAILS

Secretary: Tamarakuro Joseph Aduwari

Date: 10 May 2022

Time: 5:00 – 6:00 PM

Location: Zoom

2. ATTENDEES.

The following persons were present:

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

3. ABSENCES.

The following persons were absent:

-None-

4. SUMMARY OF PREVIOUS MEETING

In the previous client meeting, the client reviewed the data fetching processes and asked questions about our daily update strategy. The technical data calculation was discussed. Stock ranking relative to host index was presented. Fundamental data fetching, processing and storage in database was described and discussed.

5. GROUP MILESTONE

5.1 Overview

At this stage of the project, most development tasks were completed and as a result, presentations of functionality and gathering client feedback were prioritized. Issues with data fetching were raised and discussed with the client. An essential requirement that extends current functionality was added by the client. A major testing milestone was flagged by the client.

5.2 Presentation

Gavin presented the final state of the database updated with stock and index prices, technical indicators, and relative strengths.

Grayson presented all available fundamental data that are currently being sourced. The process of fetching the data, parsing required fields into appropriate data structures and storing them in a MongoDB database. Issues encountered with missing data were also discussed.

Mario presented the institutional data fetching from external APIs. The available free and paid data were differentiated and hard to find data was discussed.

Joseph presented the results of stock screening of stocks in the DOW index and compared some figures with client figures.

6. PROJECT MANAGEMENT

- Client informed the team that we would attempt a test screening in the following days when screening against a target index, specifically the S&P500, would be possible. A date was not set but is expected to be in the near future.
- Team meeting the following day Wednesday the 11th was postponed till Friday the 13th because the team had had meeting three days in a row.
- Deadlines for delivery of institutional fundamental data was set to Friday the 13th.

7. REQUIREMENTS ELICITATION

The client informed the team that screening of all stock across indexes against a reference index is an essential feature and the team prioritized the delivery of this requirement for the next client meeting. The following sub-requirements are related to this.

7.1 Database structure

Client suggested that relative strength and ranking relative to some target indexes such as S&P500 should be added to all stocks in the database.

7.2 Screening functions

Screening functions to allow for stock rankings based on target index are required.

8. Q&A

What are the next milestones to highlight in our milestone 2 plan?(Gavin)

Ans:

Client listed all 5 major milestones expected from start of project till end and asked us to include those which were not yet covered.

Is there any particular date that you would like to test our screening against?(Joseph)

Ans:

Client provided the date 23rd June 2020 as a reference date to test against.

How to deal with data that is not available on selected APIs and generally difficult to get?(Mario)

Ans:

Client suggested further research on APIs capable of providing such data or web scraping to find such data. Also in the case of data that remains difficult to get, take note of it and work with what we have.

9. ADJOURNMENT

- The meeting ended at 6:00pm.
- The next meeting is a team meeting and will be held via Zoom at 3:00pm on Friday 13 May 2022.