MINUTES FOR 3rd TEAM MEETING [4/2022]

1. MEETING DETAILS

Secretary: Junlin Wang

Date: 21 April 2022
Time: 5:30 PM – 7:00 PM
Location: Zoom

2. ATTENDEES.

The following persons were <u>present</u>:

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

3. ABSENCES.

The following persons were <u>absent</u>:

Lei Huang	(Mario)	a1820323

4. SUMMARY OF PREVIOUS MEETING

The previous meeting was mainly focused updating the progress from each member which included an implementation of a function to perform relative strength and relative rating, data assurance on delisted stocks and API options for fundamental data. Also, team continued to discuss on the plan to insert relative strength and relative rating into existing tables in the database by using update queries

5. GROUP MILESTONE

5.1 Overview

The project database has collected the stock information of each exchange and completed the calculation of the functions of relative strength and relative rating. The calculation results need to be further reviewed. In addition, the proofreading function of delisted stocks has also been completed. The next step of the team is to focus on the collection of query and fund information that meet eight conditions

5.2 Presentation

Gavin (Ratthapark Arnantayakan) explained the structure of our database also with relative strength(RS) including how to get compound value, allocate the weight, calculate relative strength and relative ratings.

Joseph (Tamarakuro Joseph Aduwari) explained the price update mechanism. The latest price record will be checked to decide if the new daily price will be added. He also showed the functions for calculating SMA and volume.

Junlin Wang (Grayson) explained how delisted stocks checks works. An API offers the delisted stocks information of US exchanges. It was used to compared with database and see if the delisted stocks were deleted.

6. INDIVIDUAL MILESTONE

Ratthapark Arnantayakan (Gavin) a1829241
Implemented the calculation of relative strength(RS) and relative rating(RR) of stocks in several indexes and plan to check the data accuracy with online resources.

Lei Huang (Mario) a182032
Found several APIs for collecting the information of fundamental data.

Tamarakuro Joseph Aduwari (Joseph) a1814359
Implemented the daily stock price update function and the calculation function of SMA and volume.

Junlin Wang (Grayson) a1761503
Implemented the check function of delisted stocks in the database (NYSE and Nasdaq)

7. PROJECT MANAGEMENT

The next work of the group should focus on the collection of fund data and the improvement of SMA/Volume, as well as the query function of 8 conditions.

8. Q & A

8.1 The same company may be listed on multiple exchanges, how should we handle duplicate tables?(Gavin)

Ans: The client initially suggested deleting the redundant tables, but then considering that different exchanges will have different RSs, it is feasible to keep them.

8.2 About the approaches to get the SMA and Volume data (Joseph)

Ans: There are 2 options: One is implementing the query and calculation functions. The other is using the library (API).

8.3 About the indicators of SMA and Volume (Joseph)

Ans: Customers want to be able to achieve more flexible sma and volume periods. Specifically, in addition to the commonly used sma indicators such as sma50 and 100 provided by us, data such as sma15 or sma60 can also be obtained.

8.4 About RS data (Gavin)

Ans: Clients wishing to obtain RS information should first focus on the NYSE, S&P500 and NASDAQ. It is recommended to add an additional column for the stock to store this kind of information.

8.5 Besides checking delisted stocks, do we need additional measures to check the accuracy of stock data (such as other APIs)?(Grayson)

Our first priority should be the collection of fundamental information. Data assurance work can be put in the last two weeks.

9. ADJOURNMENT

- The meeting ended at 7:00pm.
- The next meeting is a team meeting and will be held via Zoom at 12:00am on Sunday 24th April 2022.