

A REPORT  
ON  
**STUDY OF WEBSITE AND APPLICATIONS OF INVESTMENT  
ADVISORY SERVICE PROVIDERS**

BY

SONAKSHI GUPTA	2018B1A70614G
A. NAGA PAVAN KALYAN REDDY	2018A7PS0212G
BHAVESH KOTWANI	2018B1A70614P
KARAN SHAH	2018B2A70695G
RAGHAV JEOGANI	2018B4AA0867H
UTTUNG SURANGE	2018B2A30684P

AT

**William O'Neil, Bangalore**

A Practice School-I Station of

**BIRLA INSTITUTE OF TECHNOLOGY & SCIENCE, PILANI**

**June, 2020**

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Lastly, we acknowledge the immense efforts of our institution BITS Pilani, and the PSD for providing us this wonderful opportunity as Practice School to grow and expand our skills and help us become ready for the industry.

**BIRLA INSTITUTE OF TECHNOLOGY AND SCIENCE PILANI**  
**(RAJASTHAN)**  
**Practice School Division**

**Station:** William O'Neil

**Centre:** Bangalore

**Duration:** 6 Weeks

**Date of Start:** 19th May, 2020

**Date of Submission:** 10th June, 2020

**Name of the Project:** Study of Website and Applications of Investment Advisory Service Providers

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**Name of the PS Faculty:**

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**Key Words:** Stock screens, Portfolios, Watchlist, Query filters

**Project Areas:** Information Technology, Website Development

**Abstract:** The project aims to analyze the products and services offered by William O'Neil India and perform a comparative study with those offered by its competitors in the Indian market to suggest recommendations for improvement. This report throws light on the progress so far.

# 1. Introduction

## 1.1 The Problem

The Equity Broking and Investment Advisory Space in India is going through disruption with the entry of Investment Advisors who use technology and Quantitative Techniques to review stocks and provide advisory solutions to Indian Retail Investors. This Digital disruption is making financial markets more transparent, accessible, inclusive, and efficient. Moreover, it also helps the regulators get a better sense of the risks that participants typically take.

Many financial firms are turning to advanced algorithms to try and do the work that humans are doing for many years. Modern computer science techniques allow systems to learn from user interactions and patterns without being explicitly programmed for it. Various firms have developed smart algorithms that can identify new patterns of trading or system abuse in capital markets. Algorithms have evolved to grasp financial goals, risk profile and other intricate details of an investment to come back up with a personalized investment portfolio. The platform is available on both the website and mobile apps, making it extremely easy to access or customize. New strategies like HFT and Algo trading can improve the standard of markets, ensure greater liquidity, narrow spreads, and increase efficiency. Recent developments in machine learning technologies hold promise in analyzing data quickly and accurately.

## 1.2 Objectives

We are analyzing the products and services offered by William O Neil India and doing comparative study and research with the products and services offered by its competitors in the Indian market. The main products of William O Neil India that include MarketSmith India, SWINGTrader India, Algosmith, and PortfolioSmith have been compared with products and services offered by the following companies.

1. Markets Mojo
2. Stock Axis
3. Trendlyne
4. Sensibull

5. Stock Edge
6. Screener.in
7. Smallcase
8. Equitymaster

We have studied and evaluated the websites of the above companies and done a comparative study of every aspect of their offerings. We have analyzed the products and services of the above companies on the basis of their free services/basic plan, premium services, and website design and performance.

## 2. Critical Analysis and Key Observations

### 2.1 Trendlyne



TrendLyne is one of the few market analytics companies which offers backtesting and the ability to create customised screeners, and is popular because of its very own score for stock analysis, known as DVM.

#### 2.1.1 Free Services

Trendlyne is limited on fundamental data/information and offers subscription plans for access to screeners and other features like building customised screeners and backtesting them.

A screenshot of the Trendlyne website's screener search interface. At the top, there is a dark navigation bar with several filter options: 'Most Popular' (with a trophy icon), 'Premium' (with a dollar sign icon), 'Highest Returns' (with a rocket icon), 'DVM' (with a bar chart icon), 'All DVM' (with a clock icon), 'Live Results' (with a graph icon), 'Growth' (with a circle icon), 'Delivery' (with a gear icon), 'Value' (with a circle icon), 'Technical' (with a gear icon), 'Advisors' (with a person icon), and 'User Created' (with a person icon). Below the navigation bar is a search bar with the placeholder text 'Search Screener' and a text input field containing 'Indicator/Title/Description'. To the right of the search bar is a blue 'Search' button. At the bottom left, there is a blue button labeled '+ Create new screener'.

Durability Valuation Momentum Score: They call them DVM scores with colour coded indicators on how good or bad a score is. We don't get much by way of explanation of how the scores are arrived at except that it's their proprietary model. We will need some faith to invest based on DVM scores. Trendlyne also offers technical and momentum screeners. You can use pre-built premium screens or build your own.

The most (theoretically) useful feature is the ability to backtest screeners which is one essential (but not sufficient) input in implementing a screen-based strategy. Theoretically, because I haven't used the paid features.

## 2.1.2 Premium Services

Annual subscriptions start from ₹2,950 all the way to ₹25,890 the difference between the base and premium levels seemingly being in the number of backtests and rebalances allowed. The premium features involve unlimited real-time alpha alerts, highest return strategies, expert screeners access, best DVM stocks, with variable backtests access, depending on the type of membership taken and unlimited downloads.

## 2.1.3 Website Design and Performance

TrendLyne scored decently on GTmetrix. The fully loaded time was 3.6s, total page size was 1.03 MB and RUM Speed Index was 440.

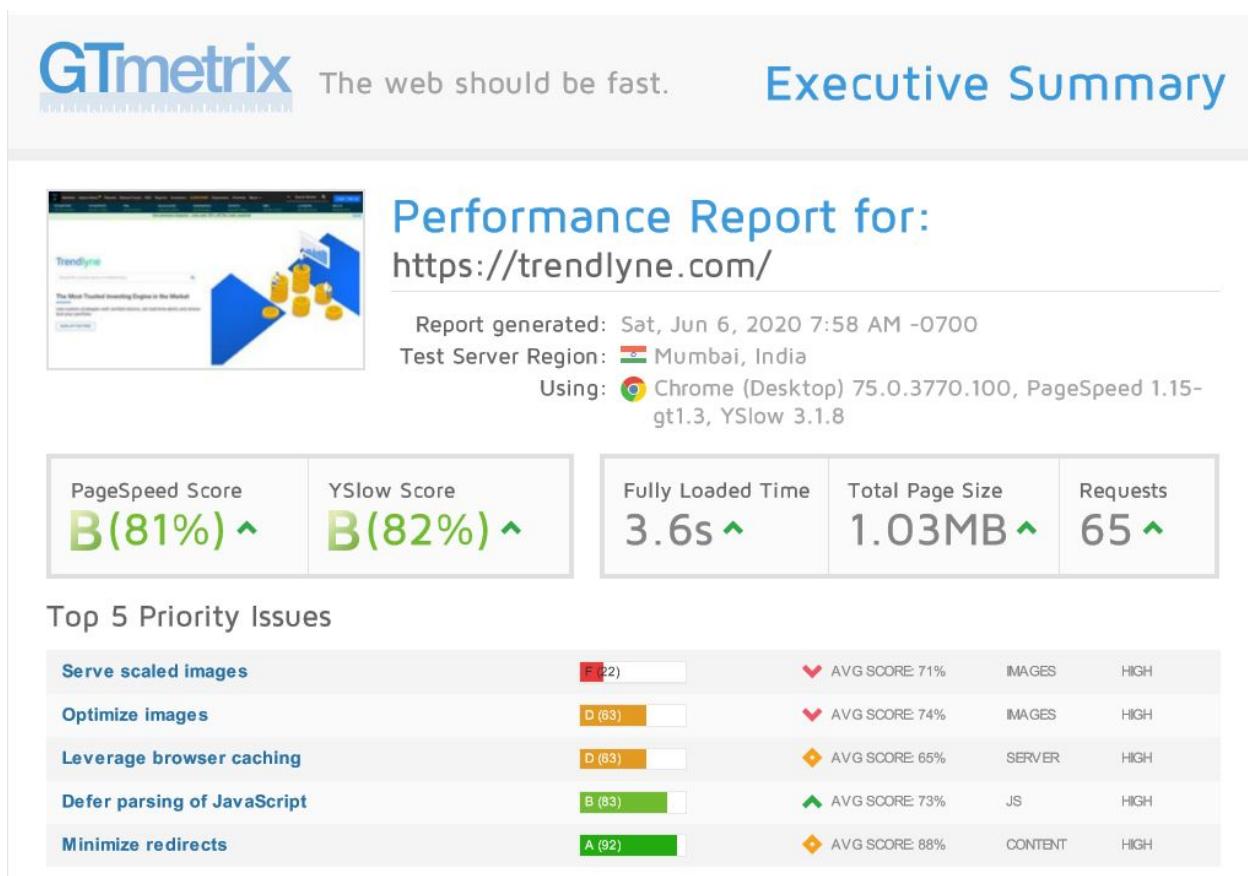


FIG. PERFORMANCE REPORT FOR TRENDLYNE

### 2.1.4 Missing Features in TrendLyne

It is very difficult to find unbiased reviews on TrendLyne, unlike on MarketSmith and Stock Edge which are reviewed by many blogging agencies. TrendLyne does not seem to be user friendly for beginners. It does not provide any sort of letter grading to the stocks for understanding them deeply.

## 2.2 Stock Edge



Stock Edge is India's one of the top Equity market analytics and research applications that enables you to do 360-degree perspective research of stock on your own by providing you with all the information that you need.

### 2.2.1 Free Services

A surprising amount of information is packed into a small visual footprint. However, the mobile-only interface will not be optimal for everyone. Fundamental information is split across two tabs: 'Fundamental' and 'Financials'. There is no interpretation of the financial numbers through colour-codes or scoring frameworks which might fail the "so-what" test when looking at a stock.

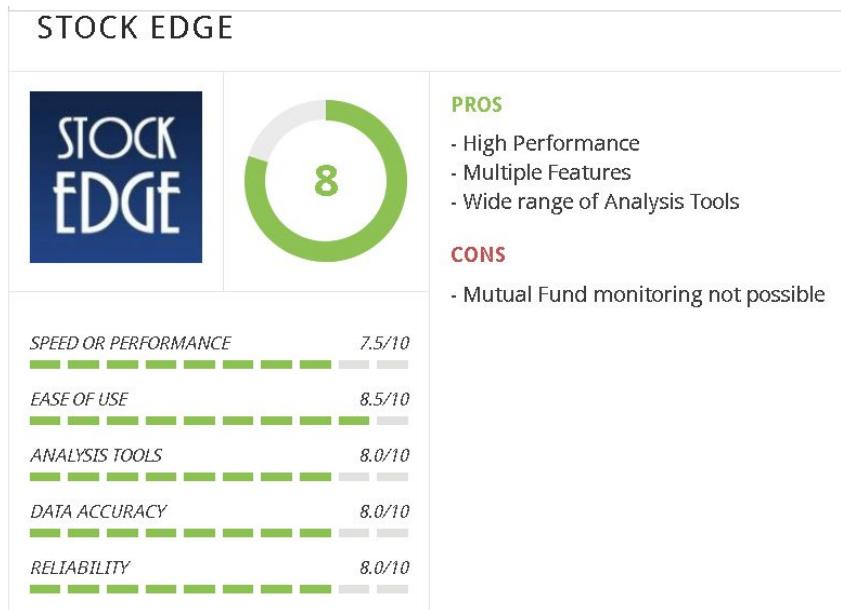
The trending visualization over the last few periods provides a handy snapshot. The visualisation of historical results can be surprisingly powerful when used to look at key return ratios. Same principle applied to shareholdings can provide a quick reason to reject some shares (where promoter shareholding is dropping).

Overall, it is a handy tool to get the highlights on a stock when on the move. Fundamental analysts might find this to be more of a starting point before diving deeper on larger screen real estate. However, the ads at the bottom overlapping the main screen can get annoying at times.

## 2.2.2 Premium Services

The premium membership plans run at ₹3,390 for the regular membership. The community-based membership with access to learning webinars called “StockEdge Club” goes for ₹15,000. They also offer a personalized mentorship program for ₹30,000. The premium features include advanced technical scans, fundamental scans, combination scans, advance charts, ready investor groups, ready combination scans and ready watchlists.

## 2.2.3 Website Design and Performance



Stock Edge scored very poorly on GTmetrix. The in-depth analysis is given in the figure below.



## Performance Report for: <https://stockedge.com/>

Report generated: Sat, Jun 6, 2020 7:59 AM -0700

Test Server Region: Mumbai, India

Using: Chrome (Desktop) 75.0.3770.100, PageSpeed 1.15-gt1.3, YSlow 3.1.8

PageSpeed Score <b>E(58%)</b> ▼	YSlow Score <b>D(68%)</b> ▼	Fully Loaded Time <b>3.3s</b> ^	Total Page Size <b>2.93MB</b> ^	Requests <b>93</b> ▼
------------------------------------	--------------------------------	------------------------------------	------------------------------------	-------------------------

### Top 5 Priority Issues

Defer parsing of JavaScript	<span style="width: 10%;">F (0)</span>	AVG SCORE 73%	JS	HIGH
Leverage browser caching	<span style="width: 10%;">F (0)</span>	AVG SCORE 65%	SERVER	HIGH
Optimize images	<span style="width: 10%; background-color: red;">F (0)</span>	AVG SCORE 74%	IMAGES	HIGH
Serve scaled images	<span style="width: 15%; background-color: yellow;">C (71)</span>	AVG SCORE 71%	IMAGES	HIGH
Enable compression	<span style="width: 15%; background-color: yellow;">C (78)</span>	AVG SCORE 90%	SERVER	HIGH

**FIG. PERFORMANCE REPORT FOR STOCK EDGE**

### 2.2.4 Missing Features in Stock Edge

Unlike MarketSmith, Stock Edge does not display the top priority stocks based on scores like EPS rating, Master Score for free. Mutual Funds monitoring isn't possible either. Stock Edge does not offer the letter grading system to get the user acquainted with the market condition of the stock.

The main webpage actually does not contain any information about trending stocks and portfolios, for that you need to be redirected to another webpage.



Stock Edge redirects to the webpage containing viable data and analysis tools to analyse trending stocks and make notes.

## 2.3 Smallcase



Smallcase Technologies builds platforms & investment products to invest better in Indian equities. A smallcase is a basket of stocks/ETFs weighted intelligently to reflect an idea. It is a competitor to Algo Smith.

### 2.3.1 Free Services

SmallCase Free services give access to most of the smallcases overview which consists of:

1. Basic features of the technical graphs
2. An introduction to that particular smallcase
3. Pros of the Smallcase/Reasons to buy it
4. Pricing and basic technical analysis

### 2.3.2 Premium Services

SmallCase premium services give access to:

1. More technical analysis features
2. ETFs of the smallcase
3. Weights of the smallcase
4. Gives access to all the smallcases available on the website

### 2.3.3 Differences Compared to AlgoSmith

There are a lot of differences in the way both websites function and have various different features. The major differences include:

1. Provides with a lot of different algos (100s) in comparison to algosmith's 4 algos

2. Provides algos/plans made by different firms like ICICI Prudential AMC, Wright Research, HDFC Securities etc.
3. Does not let you log in unless you have a DMat Account
4. Has different categories of Algos like Budget 2020, Long term, Government returns, Dividend & Income, Sector Trackers etc.
5. For news, in a particular algo, in Algosmith, we need to buy that algo, but in Smallcase we don't
6. While looking for different algos, there are various filters in the Smallcase like min investment, type, risk, and a search query field to search by keyword.
7. Has extra filters like Newly Added, Top gainers last year/last month, recently rebalanced, low investment amounts.
8. Has a blog feature where various stock market related news/blogs are updated on a time to time basis
9. Has a 'We're hiring' feature that shows the open positions in their company for people to make it easier to approach them for jobs
10. Has its products on different Firms like 5paisa, Zerodha, Trustline, Kotak Sec, HDFC Sec ect.
11. Allows user to create his own algo/strategy

### 2.3.4 Web Design and Performance



**FIG. RATINGS FOR SMALLCASE AS SEEN ON ADIGITALBLOGGER**

We compared the performance of Smallcase and AlgoSmith on GTmetrix and received the following report.



## 2.4 Stockaxis



Stockaxis is an investment advisory company which advises people on the stock market. Stockaxis is a Mumbai based SEBI registered advisory firm. It provides recommendations on investments and stock markets to individuals and corporate houses. It has a team of professionals who study the market and its trends. It is a competitor to MarketSmith India.

### 2.4.1 Free Services

All its research tools are free services. All charts provided by them are same for free as well as premium services and they also give fundamental analysis.

Their research tools include:

1. Stock trend/rating
2. Stock analyser
3. Ace investor portfolios
4. Change in trend
5. Stockaxis top 50
6. Top 10 industries
7. Rating check-up
8. Sector wise stocks
9. F&O watchlist
10. Business news

### 2.4.2 Premium Services

As premium services, they include advisory plans and services like:

1. Long-short strategy
2. Multibagger
3. Premium Plus
4. Blue-chip
5. Vision 10x
6. All in one

And these plans are either quarterly or yearly plans with prices ranging from 12,000 to 25,000 for a 3 month plan or 30,000 to 80,000 for a yearly plan

#### 2.4.3 Differences Compared to MarketSmith India

- a. Does analysis using MILARS strategy instead of CANSLIM method
  - M - Market Direction
  - I - Industry Ranking
  - L - Leading Company
  - A - Acceleration in Earnings
  - R - Relative Price Strength
  - S - Selling Rules
- b. It has a transparent complaint box to establish customer's trust
- c. It has a list of different strategies like Longshot Strategy, Multibagger stocks etc.
- d. It has trends based on Fundamentals, Stock/ETF Trend, Stock Rating
- e. It has search features by Trend, Ace investors, Changes in trends, Top industries/Stocks.
- f. It has options to search sector wise stocks
- g. It has ratings on the basis of Market Cap, Technicals, Fundamentals, Growth, and trends.
- h. It has a special F&O watchlist feature
- i. It has a tab for business news that shows news summaries on the page itself
- j. It has a feature to connect and schedule meetings with research analysts to optimize your portfolio on the basis of MILARS methodology.

#### 2.4.4 Website Design and Performance

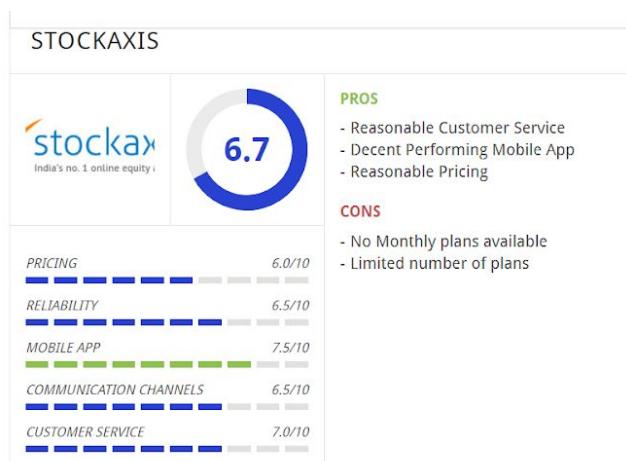
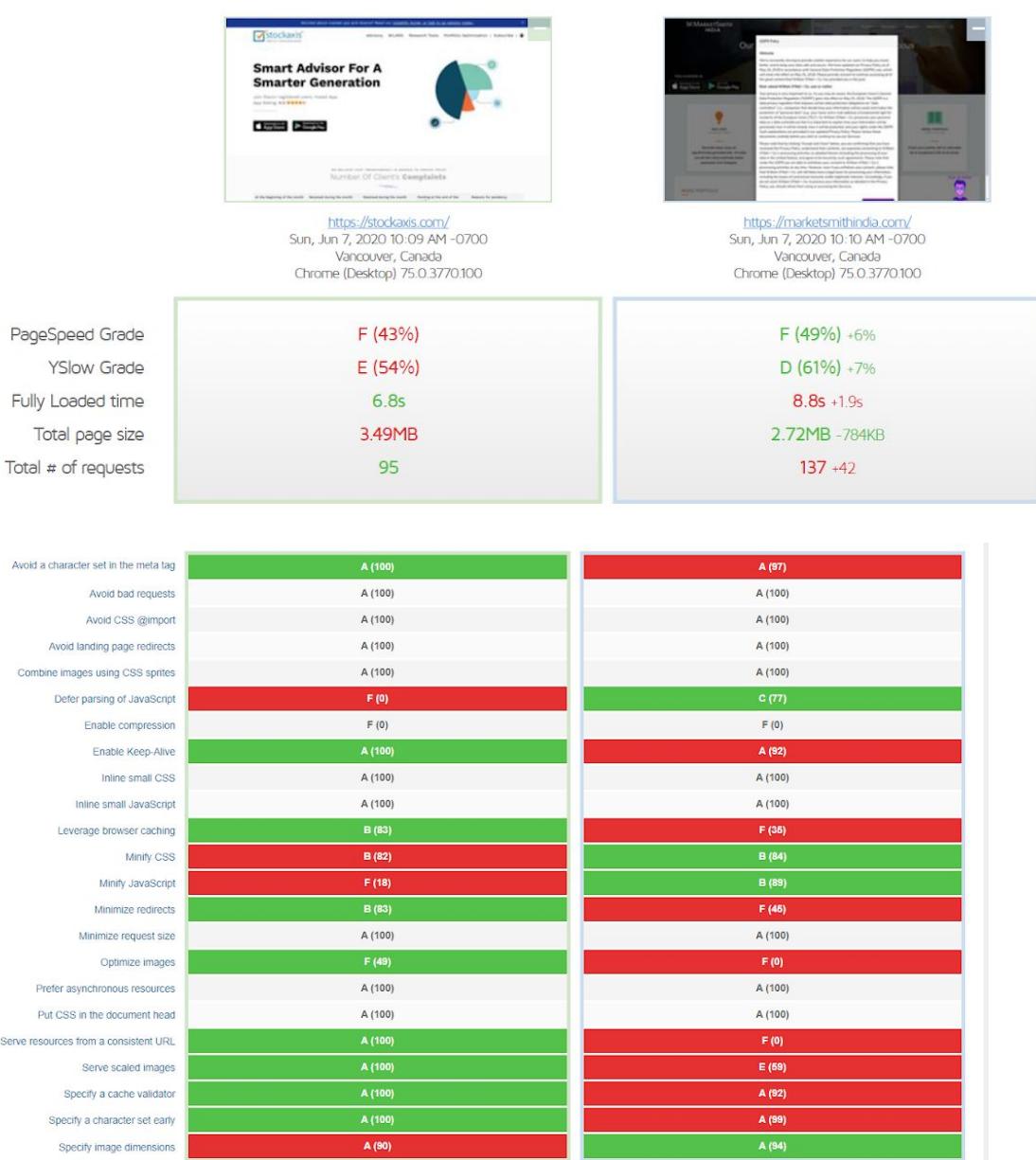


FIG. RATING AS SEEN ON ADIGITALBLOGGER

We compared the performances of Stockaxis and MarketSmith on GTmetrix and received the results as follows.



## 2.5 Equitymaster



Equitymaster is an independent equity research initiative. The platform provides views and opinions on small caps, mid caps, gold, and derivatives among other investment avenues, such as investing for the extreme long term. They provide the users the freedom to choose the investment style, the investment horizon, and the investment theme. The team at Equitymaster recommends to its users various investment strategies.

### 2.5.1 Free Services

Equitymaster offers both free and paid services covering a broad range of stock market investments. The user can check the latest stock price details of stocks sorted by different key sectors, major groups like Tata, or indices like BSE etc. Detailed reports are available for free. However, the landing page of their website was a full page spam-advertisement which gives a bad first impression to the user.

A screenshot of a web browser displaying the Equitymaster website. The address bar shows "equitymaster.com". The main content area features a large red banner with the text "3 Small-Cap Stocks Set for a Massive Rebound" and "Potentially 200%, 400%, And Even 900% in the Coming Years". Below this, a timer displays "01 Days 20 Hours 51 Minutes 10 Seconds". A text input field for an email address is followed by a large orange button labeled "Get Full Details Here...". At the bottom, there is a link to "No thanks" and a note about hating spam and reading terms of use.

FIG. FULL PAGE ADVERTISEMENT

## BSE IT Stocks ▾



Here are the latest stock price details of the stocks in the BSE IT. For more detailed updates, check the latest [BSE IT stock results](#) and see the latest [BSE IT long term chart](#).

**Covid-19 Special 3x Opportunity: Five "Essential" Stocks to Buy Before the Lockdown Ends...**

[» Result Scoreboard](#) | [Best Performing Stocks](#) | [Refresh](#)

SCRIPT	BSE PRICE (Rs)	NSE PRICE (Rs)	CHART	MORE INFO
3I INFOTECH LTD.	1.99 <span style="color: green;">9.94% ↑</span>	1.95 <span style="color: green;">8.33% ↑</span>		<a href="#">More Info ▾</a>
63 MOONS TECH.	63.70 <span style="color: green;">9.92% ↑</span>	63.90 <span style="color: green;">9.98% ↑</span>		<a href="#">More Info ▾</a>
8K MILES SOFT	23.70 <span style="color: green;">4.87% ↑</span>	24.05 <span style="color: green;">4.79% ↑</span>		<a href="#">More Info ▾</a>
ACCELYA KALE	943.25 <span style="color: green;">0.59% ↑</span>	943.05 <span style="color: red;">-0.24% ↓</span>		<a href="#">More Info ▾</a>
ALLSEC TECHNOLOGIES	193.05 <span style="color: green;">3.87% ↑</span>	192.15 <span style="color: green;">4.29% ↑</span>		<a href="#">More Info ▾</a>
APTECH LTD	102.45 <span style="color: green;">1.49% ↑</span>	102.60 <span style="color: green;">1.53% ↑</span>		<a href="#">More Info ▾</a>
AURIONPRO SOLN	45.35 <span style="color: red;">-0.98% ↓</span>	45.40 <span style="color: green;">0.11% ↑</span>		<a href="#">More Info ▾</a>
AXISCADDES ENG.	34.80 <span style="color: green;">1.75% ↑</span>	34.45 <span style="color: green;">1.47% ↑</span>		<a href="#">More Info ▾</a>
CEREBRA INTE	28.95 <span style="color: green;">1.94% ↑</span>	28.85 <span style="color: green;">1.94% ↑</span>		<a href="#">More Info ▾</a>
CIGNITI TECHNOLOGIES	289.05 <span style="color: red;">-0.41% ↓</span>	289.30 <span style="color: red;">-0.24% ↓</span>		<a href="#">More Info ▾</a>
CYIENT	220.40 <span style="color: green;">3.67% ↑</span>	220.25 <span style="color: green;">3.72% ↑</span>		<a href="#">More Info ▾</a>
D-LINK (INDIA)	85.05 <span style="color: green;">8.34% ↑</span>	85.00 <span style="color: green;">8.28% ↑</span>		<a href="#">More Info ▾</a>
DATAMATICS GLOBAL	51.50 <span style="color: green;">2.59% ↑</span>	51.65 <span style="color: green;">1.18% ↑</span>		<a href="#">More Info ▾</a>
ECLERX SERVICES	416.55 <span style="color: green;">0.29% ↑</span>	416.60 <span style="color: green;">0.41% ↑</span>		<a href="#">More Info ▾</a>

**FIG . LATEST STOCK PRICE DETAILS**

The platform also provides free subscriptions to various informative newsletters as well as blogs. The newsletter and blogs provide information about current market movements, current business affairs, as well as talk about the various types of investment and trading products. Although a good initiative, the constant advertisements for the same can put off potential clients.

### 2.5.2 Premium Services

The premium services are divided into three categories - Fundamental, Trading and Learning. There are several services provided in each category, such as Equitymaster Insider, Microcap Millionaires, StockSelect, Breakout Profits, DeriVantage, etc. While this may be advantageous for experienced traders, it can seem very intimidating for beginners. Almost all the popular services act as generalized recommendation services. There is a serious lack of customization options.

#### What StockSelect does not offer?

StockSelect is a generalized recommendation service. We do not offer customized opinions for any particular subscriber or class of subscribers. We are not qualified financial advisors nor Investment Advisors and we strongly recommend our subscribers seek professional advice before taking any decisions for their investments.

**FIG . ONLY A RECOMMENDATION SERVICE**

Under the Learning category, several web-based courses are provided by Equitymaster. They are only available at a subscription fee of around 5k-9k/year depending on the course. There is a 30-day money back guarantee on the premium services.

### 2.5.3 Website Design and Performance

From a purely aesthetic standpoint, the website itself isn't very attractive. It features a very simple (but outdated) template that may be useful for people with slower internet speeds but don't attract the user. In this day and age when there is a lot of saturation in terms of the content available, aesthetics play a significant role in deciding website traffic.

The screenshot displays a grid of articles from PersonalFN, followed by a sidebar for a special report titled "India's #1 Trader Reveals His Secrets".

**PersonalFN | Outside View**

**Here's How Redemption Pressure Could Trigger a Liquidity Crisis For Debt Mutual Funds**  
Personalfn explains in its DWL how increase in redemption pressure may increase liquidity crises for Debt Mutual Funds.

**Rebound Riches**  
**Watch Replay...**  
Watch the limited time replay of our urgent mega summit revealing once-in-a-decade opportunity available in the smallcap space

**Vijay Bhambhani | Fast Profits Daily**  
**Our Next Crude Oil Trade**  
The recent OPEC+ meeting has set the stage for our next profitable trade in crude oil.

**Vijay Bhambhani | Fast Profits Daily**  
**My Favourite Trade of 2020**  
An update on my top trade of the year.

**Apurva Sheth | Views On News**  
**How to Interpret a Candlestick Chart? [D]**  
Candlestick charts add much more depth and value compared to line or bar chart. In this video Apurva shows how to interpret t...

**Monish Vora | Today's Market**  
**Sensex Trades in Green; IndusInd Bank & TCS Top Gainers**  
The BSE Sensex is trading up by 171 points, while the NSE Nifty is trading up by 38 points.

**Ricca Agarwal | Profit Hunter**  
**Smallcap Stocks that Will Ride the Covid-19 Rebound**  
While the broader markets have risen, in the smallcap space, there are still quality stocks that could join the rally soon.

**Tanushree Banerjee | Profit Hunter**  
**95% of Stocks Are Up! What does this Tell You about India's Swoosh Recovery?**  
A sobering fact about the Unlock 1.0 market rally will make you cautious.

**Apurva Sheth | Profit Hunter**  
**Rating Agencies Are Noise Makers. Ignore them and Focus on Price Action**  
Ratings agencies get more credibility than they deserve. You must focus on price action and ignore their noise.

**India's #1 Trader Reveals His Secrets**  
Get this Special Report, **The Secret to Increasing Your Trading Profits Today, Now!**  
Enter E-Mail Address  
**Send My Free Report!**  
We will never sell or rent your email id.  
Please read our [Terms](#)

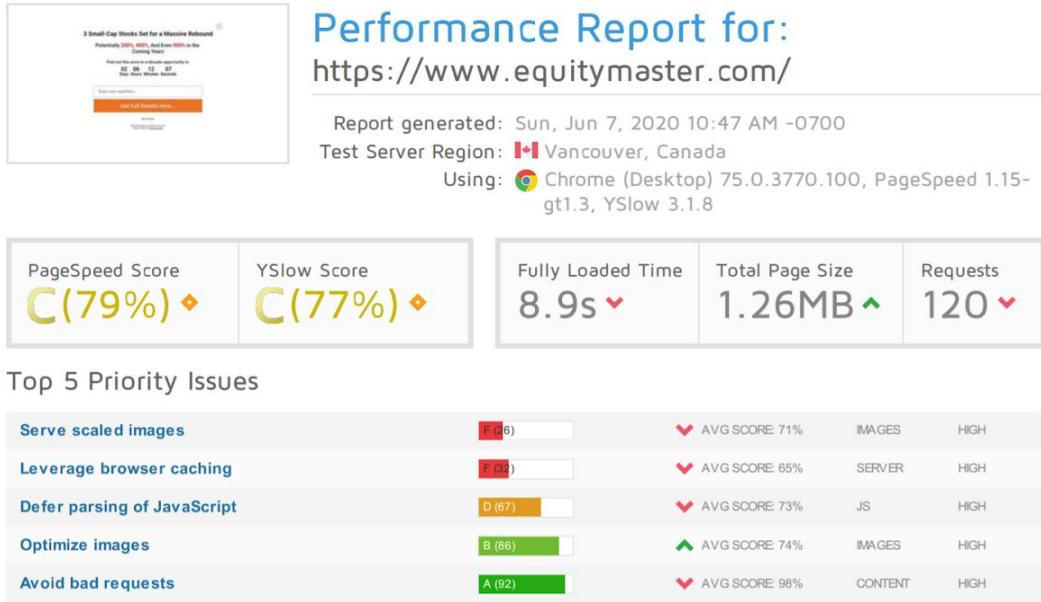
**OUR TOP 5 IDEAS**

1. [How to Trade the Coronavirus Crash - Download this FREE Report Now](#)
2. [Are You Making One of These 15 Costly Mistakes While Investing. Learn more!](#)
3. [A Guide to some of the Most Lucrative Stocks in the Market. Download For Free!](#)
4. [Free Report: The Secret to Increasing Your Trading Profits Daily!](#)
5. [No Guessing. No Hunches, and No Missed Trends Ever! Join Us on YouTube Now.](#)

**FEATURED POSTS**

**FIG. PLAIN WEBSITE DESIGN**

For a website that is not very heavy on styling, the loading speed was quite slow, as measured by GTmetrix. The five main issues are highlighted in the figure below.



**FIG. PERFORMANCE REPORT FOR EQUITYMASTER**

## 2.6 Screener



Screener is a research tool for equity investors in India. It provides financial data of listed Indian companies which can be used to find and analyse new stock ideas.

### 2.6.1 Free Services

The website provides customized financial reports which seem to be quite interactive, user-friendly and easy to use. The most useful feature is probably the Query Builder, a very versatile tool, that allows users to apply a number of filters so they can shortlist stocks based on P/E ratio, market capitalization, book value, ROE, profit, sales, etc. It is very user-friendly and easy to specify the queries, even for beginners.

## Create a Search Query

The screenshot shows a user interface for creating a search query. On the left, there is a large input field labeled "Query". To the right of the input field, there is a "Custom query example" section containing the following text:

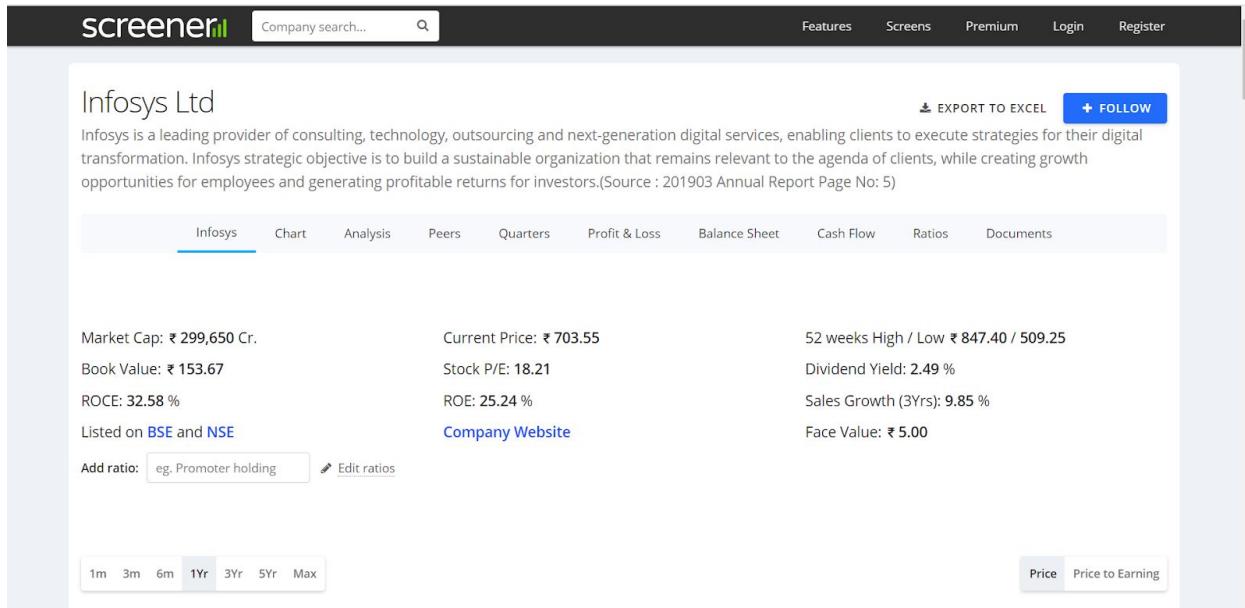
Market capitalization > 500 AND  
Price to earning < 15 AND  
Return on capital employed> 22%

Below this, a blue link reads "Detailed guide on creating screens". At the bottom left, there is a checkbox labeled "Show only those companies where recent quarter result is available?". At the bottom right, there are two buttons: a blue button labeled "▶ RUN THIS QUERY" and a white button labeled "SHOW ALL RATIOS" with a blue icon.

**FIG. SCREENER'S QUERY BUILDER**

There is a very powerful customization tool, something that was lacking in Equitymaster's website. Users can save modified queries as their own user-generated screens, and access later for future reference. In addition, the user can run queries on 10 to 15 years of financial data.

It is also possible to track announcements and other regulatory filings all at one place. The "Export To Excel" feature is quite handy but seems to be missing in most other available services. After exporting, the charts and colour codes are also included. Users can create custom stock screens, maintain a watchlist of 50 companies, set 2 screen alerts, view 15 columns for comparison, and create custom ratios.



**FIG. STOCK SCREEN FOR INFOSYS LTD**

The screener stock page displays a “Pros” and “Cons” for each stock based on fundamental principles.



## 2.6.2 Premium Services

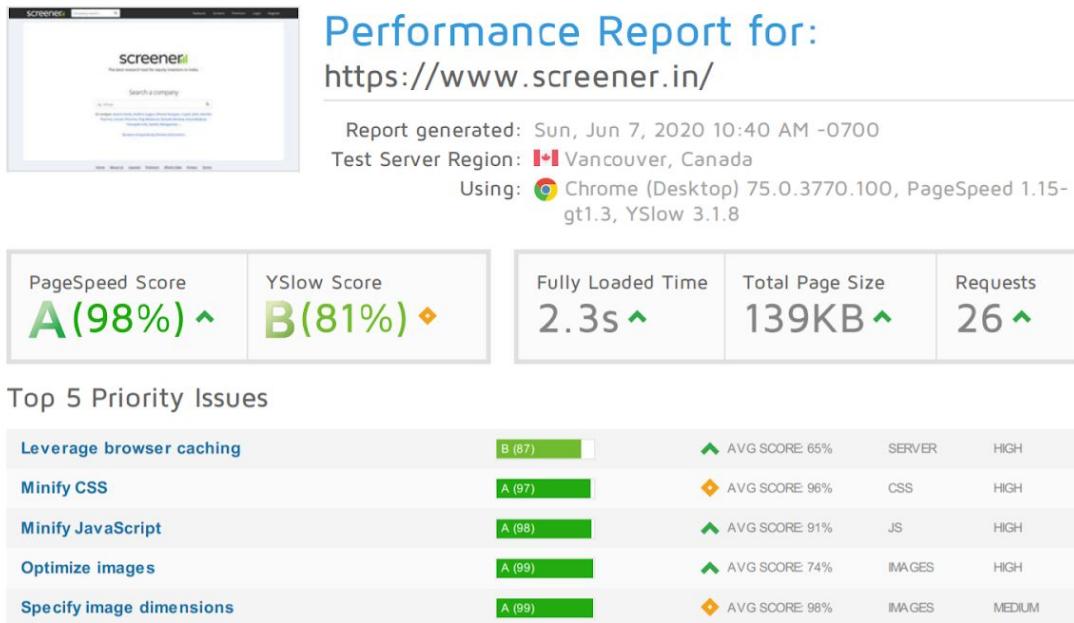
Screener grants its users access to most of its key features for free. The Premium plan provides further improvements to those features as well as expanded functionality. A premium user can download watchlist or screen results, add unlimited companies in the watchlist, receive unlimited stock screen alerts, view 50 columns for comparison with detailed peer comparison, filter the watchlist and screens by industry, maintain multiple watchlists, view all industry and sector peers, and receive priority support from the Screener team. All of these are in addition to the features provided in the basic plan, including the Query Builder, etc.



**FIG. PREMIUM TOOLS**

### 2.6.3 Website Design and Performance

The website has a modern design. The styling is functional and doesn't distract the user from the main content. All the information is presented in an effective manner, without compromising on performance. The website scored quite well in the report generated by GTMatrix.



**FIG . PERFORMANCE REPORT FOR SCREENER**

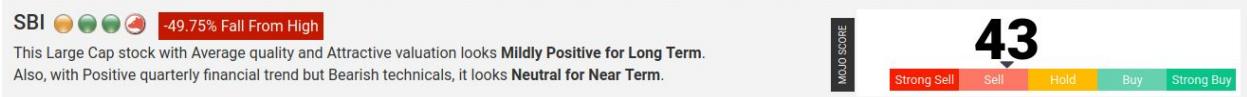
## 2.7 Marketsmojo



MarketsMojo, a multi-algorithm-based financial investment analysing platform started by 42-year-old Mohit Batra and 47-year-old Joyson Thomas, the founding members of Moneycontrol. A client's portfolio is analysed on seven parameters — returns, risk, liquidity, diversification, quality valuation, and current financial trends. "All algorithms are back tested over the last five years and results are provided on the platform," says Joyson. In all, over 30 million data points are analysed daily, covering anything that may affect an investor's decision-making process. The platform caters to direct clients and also as an integrated API for various financial intermediaries.

### 2.7.1 Free Services

- Marketsmojo looks to analyze stocks every which way and offer a three traffic-light view summarizing the suitability of the stock.
- They do boil down all the information to three hard-to-miss traffic lights meant to signify Quality, Valuation and Financial Trend.
- The page explodes with so much information, it can be a challenge to know where to look.
- Marketsmojo valuation is based on a comparison of current price multiples against historical trends for the stock and with sector peers. Further information says "We have looked at many variables including asset-based valuations to make the measure more stable and meaningful."
- The features provided by MarketsMojo are:
  1. Stocks
    - Similar feature for analysing a stock in MarketSmith with Marketsmojo strategies and with a bar which clearly reflects the advice without any confusion for the beginner.
    - They rate a stock using Mojo Score based on
      1. Quality
      2. Valuation
      3. Financial trend
      4. Technicals



## 2. Markets

- The Markets feature provides information about top Losers ,Gainers of the day and some financial and historic information about Indian markets and indices.

## 3. WatchList

- The WatchList is similar to the Watch list of MarketSmith.

## 4. Portfolio

- The portfolio feature has a portfolio analyser which analyses the portfolio and recommends some action.(similar to PortfolioSmith).

## 5. Recos

- This feature is similar to the Model portfolio in marketSmith but less promising when compared to its premium service.
- The Recos tab gives the Recommendations on brokers and stock Ideas along with filters

## 2.7.2 Premium Services

- **Stock Score** - For ALL listed stocks
  1. **Simply input your stock** – and check for our score and you can also deep dive into the analysis and research on that stock
  2. **Save the stock that interests you** - save it in watchlist to track or simply add it to your portfolio if you are holding that stock
  3. **Automated alerts** – once you have added the stock to your watchlist or portfolio, mojo will be sending you alerts on all saved stocks
  4. **See all our top stocks together** – if you need an investing idea and don't know where to start, simply go to our mojo stock section where we have pre-selected our top stocks for you
- **Model Portfolios** - Conservative, Moderate and Aggressive
  1. **Decide the investment amount and your profile** - input your amount and select your profile, and mojo generate the most optimum portfolio for you.

2. **Use your own broker** - you would get a trade sheet, and you can buy the portfolio stocks through your own broker.
  3. **Track your investments** – you can track your investments in real-time via our desktop site or app.
  4. **Real-time monitoring** - mojo watch out for your portfolio, and if there is any further buy and sell, you will get a mail and notification, and you need to execute the same via your broker.
  5. **Multiple portfolios or add cash** - you can invest in multiple portfolios and also add more money to your existing portfolio.
- **Portfolio Optimization**
  - **Mojo Stocks**
    1. **Get All top Stocks at One Place** - instead of going to different pages and checking the stock score, this section will give you all our top stocks at one place.
    2. **Get an Overall top of the top List** - Across sectors and market caps, we give you a list of top-10 stocks across 4000 stocks to make a winning portfolio.
    3. **Add Stocks to** - watch list or portfolio straight
    4. **Set Alerts** - stock wise so that you are always updated when a stock moves out or move into our top list
  - **Screener** - Find top stocks with your filters
    1. **Mojo Logic Screener:**  
Customize our pre-chosen factors of Quality, Valuation, CFT and Technical with industry, market cap and other simplified factors
    2. **Mojo Expert Screener:**  
Be an expert and make your formula set out of all possible balance sheet, cash flow, P&L, and other derived data points
    3. **Pre-Selected Investment Ideas:**  
mojo have a ready-made list of 18 investment ideas. Just see your style and see the list automatically
  - **Reviews** - Portfolio Reviews once a quarter with CIO
  - **Stock of the month** - Handpicked investment ideas by CIO every month

## 2.7.3 Reviews

The screenshot shows the MarketsMojo website interface. At the top, it displays the Nifty Midcap100 index at 14158.05, up by 245.25 (1.76%). Below this is a header with the MarketsMojo logo and a search bar. The main content area includes a table of stock performance, a section for indices hitting 52-week highs, a 'Losers' section, and a 'Top Losers - Nifty 500' table. On the right, there's a 'MOJO STOCKS 3 MONTHS' summary for the BSE 500, showing a down trend of -10.4%. The bottom right corner features the 'MOJO PROFESSIONAL' logo.

Latest Price	Chng(%)	Day's Low	Latest Price	Chng(%)
Vodafone Idea	1.89 (+21.00%)	10.78 0.06	Tata Motors	12.20 (+12.30%)

**INDICES THAT HIT 52 WEEK HIGH TODAY** S&P BSE Telecom,S&P Bse Healthcare hit new 52

Raymond	50.00 (-19.29%)	276.45	DILU LTD.	10.00 (-7.59%)
314.10		236.15	Tata Steel	19.20 (-6.00%)
Jindal Stain. Hi	8.10 (-18.66%)	52.05 45.60	339.35	
51.50				

→ Full List      → Full List

**Losers**

Top Losers -Nifty 500			MOJO STOCKS 3 MONTHS		
Company	Chng	Day's High			
Latest Price	Chng(%)	Day's Low			
TCNS Clothing	-19.85 (-4.78%)	410.00 394.85	<b>BSE 500</b> <b>▼ Down by -10.4!</b>		
305.75			Our Mo		

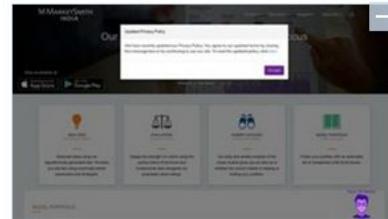
MOJO PROFESSIONAL

- Bad Mojo UI compared to MarketSmith
- The MarketsMojo professional has no trail plan.
- The Website actually loads with a lot of information and the user interface collapses once in a while.
- The online reviews were not so encouraging for the company and the premium users frequently complained about their recommendations.
- The only good thing about the website for user-experience is its loading time due to the page size.

## 2.7.4 Website Design and Performance



<https://marketsmojo.com/>  
Wed, Jun 10, 2020 3:51 AM -0700  
Mumbai, India  
Chrome (Desktop) 75.0.3770.100



<https://marketsmithindia.com/>  
Wed, Jun 10, 2020 3:52 AM -0700  
Mumbai, India  
Chrome (Desktop) 75.0.3770.100

PageSpeed Grade  
YSlow Grade  
Fully Loaded time  
Total page size  
Total # of requests

C (77%)  
B (85%)  
1.5s  
975KB  
87

F (49%) -28%  
D (61%) -24%  
4.6s +3.2s  
2.70MB +1.75MB  
138 +51

- The waterfall and various differences behind the scores can be understood with the [link](#).
- The web Page performance is mainly driven by page size and number of requests.
- MarketsMojo managed both of them to an appreciative level.

## 2.8 Sensibull



Sensibull is India's first options trading platform, offering everything from simplified options trading for new investors to powerful trading tools for the pros. Sensibull aims to make options trading safe, accessible, and most importantly, profitable for all.

Sensibull was founded with the absurdly impossible vision of making the small guy win against the big guy in financial markets. Sensibull encourages clients to invest in F&O trading.

## 2.8.1 Free Services

- Advice on whatsapp.

The screenshot shows the Sensibull platform interface. On the left, there are two strategy cards:

- BEARISH - HEROMOTOCO Expiry below 2400**: Target Date 25 Jun 03:29 PM, Capital 45.80K, HEROMOTOCO FUT 2,351.80 +0.2%.
- BEARISH - Nifty June Expiry below 10300**: Target Date 25 Jun 03:30 PM, Capital 40.57K, NIFTY FUT 10,179.00 +0.3%.

On the right, there is an "Advisors" section with a card for "Sensibull" showing a performance of 194/357 (54.3%) and a "Get WhatsApp Alerts" button.

- **EasyOptions** for beginners.
  1. If you have a view on a stock, Sensibull convert that to an Options Strategy - All you need to do is tell us your view in simple English
- I think if you have some knowledge about derivatives market sensibull is a good choice for beginners for practise and investing.
- Options Strategies Wizard.
  1. We are supposed to tell where a stock is going and wizard will give you smart option strategies to trade.
- Virtual Trading Without real Money.

The screenshot shows the Sensibull Virtual Trading interface. At the top, it says "SENSIBULL | VIRTUAL TRADING". Below that is a yellow bar with the text "Become an Options Expert with Club Sensibull. Use Coupon Code INTRO20".

The main area shows a portfolio summary:

BANKS	Total P&L	Unrealized P&L	Realized P&L	Total Theta
	0	0	0	-90

Below this, there is a table for "1 Strategies". It shows a single position:

GOTOHEAVEN	LTP	Unrealized P&L	Realized P&L	P&L
HDFCBANK FUT 1,037.35 +0.5%	1.14	0	0	0
QTY 500 AVG 1.14				1 Positions ^

At the bottom, there is a table for option details:

Delta	Vega	Gamma	Theta
13	75	0.262	-90.0

Buttons at the bottom include "Add Order", "Analyze", "Edit (1)", "Notes (0)", and "Exit (1)".

## 2.8.2 Premium Services

- Strategy Builder
- Screener, Technical Signals
- Option chain, open Interest Analysis, FII DII data

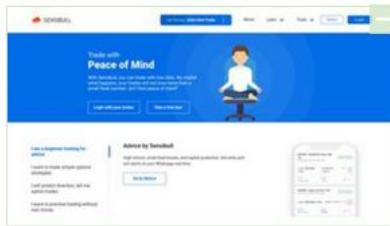
## 2.8.3 Reviews

- It doesn't explain anything about stock (the fundamentals and technicals).
- It is not too easy for any beginner to start with sensibull.

Pros	Cons
Brings the best of a strategy engine and trading platform	Filtering of strategies based on risk and reward is not possible.
Packed with useful features like Option Analyzer, Futures Conversion, Event Calendar etc.	Traders need a good understanding of option strategies to optimally use the platform
Makes executing complex strategy simpler with a single click	Platform pricing makes it unsuitable for small and occasional traders.
Sleek and simple interface	

## 2.8.4 Website Design and Performance

- The waterfall and various differences behind the scores can be understood with the [link](#).
- Sensibull seems to have not optimised its website which can be seen by its slow size and high load time.
- The page size is not surprising, since there is not much information or data available on the site.



<http://sensibull.com/>  
Wed, Jun 10, 2020 3:49 AM -0700  
Mumbai, India  
Chrome (Desktop) 75.0.3770.100

PageSpeed Grade

YSlow Grade

Fully Loaded time

Total page size

Total # of requests

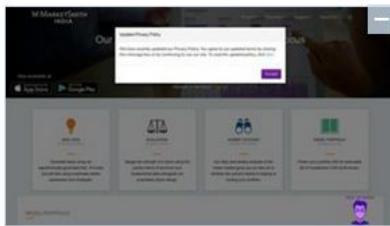
D (69%)

C (78%)

6.1s

1.11MB

53



<https://marketsmithindia.com/>  
Wed, Jun 10, 2020 3:49 AM -0700  
Mumbai, India  
Chrome (Desktop) 75.0.3770.100

E (50%) -19%

D (61%) -17%

3.2s -2.9s

2.70MB +1.59MB

135 +82

### **3. Shortcomings and missing features**

By using unconventional techniques and modern technology, the services provided by William O'Neil India succeed in providing a platform for easy and efficient retail investing in India. Market Smith's stock analysis combines fundamental and technical/momentum factors to arrive at a "Master Score", a letter rating where it recommends focusing your research on stocks rated B or better. Most fundamental information is summarized by the parameter 'EPS Strength' – a score of 0 to 99 based on long-term and recent financial performance. A unique feature of MarketSmith is the 'Checklist' feature that checks for conditions met against 3 standard frameworks: CANSLIM, Benjamin Graham and James O'Shaughnessy.

These are a few recommendations for improving the services provided by William O'Neil:

- The MarketSmith website provides a group rank for the companies in a particular industry, a new Peer Comparison chart could be added, like the one provided by Screener.
- An option can be added to the MarketSmith website that lets users export the data to Excel or other softwares so that users are able to perform their own analyses as well.
- The MarketSmith website needs to get more optimized, as can be seen from the performance comparison report between the three websites.
- AlgoSmith could provide a platform where the users can design and implement their own algorithms/strategies, like the one provided by Smallcase.
- MarketSmith has a ton of pre-built stock screens under themes like India Model Portfolio, Guru Screens and Marketsmith Stock Screens but the problem is each screen throws up a set of stocks, but the criteria that picked them are not intuitive to the user.
- The Market Outlook is another salient feature, which provides an insight over the current market situations and tells whether the investors portfolio is going to survive or not.
- A bar type of advice for buy, sell, hold using underlying parameters provided by the analysts for clients to give the advice to mind without any confusion for the beginners.

- MarketMojo provides broker recommendations based on their returns per call along with filters, which is also a resource to recommend a broker for the client individually.
- A virtual trading feature which is helpful for beginners to start trading.
- Search Engine Optimisation for reducing load time, increasing offsite citations to have a good index rank for BFSI related queries.
- Even though the Equitics website has a low loading time, it topped the search engine ranking mainly due to reviews and views.

no 1 stock advisory firm in india

About 27,90,00,000 results (0.95 seconds)

## Equitics

1 in the best investment advisory service in India. In this manner working hard from continuous 11 years, Equitics became the most successful stock advisor in India. Equitics is India's no. 1 stock advisory company and a Reliable intraday tips provider or Best **SEBI** registered stock advisory company.

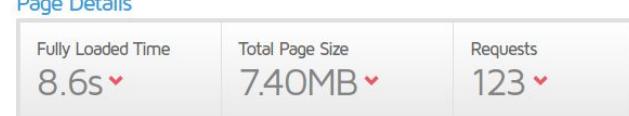
[www.equitics.in](http://www.equitics.in) › blog › who-is-the-most-successful-st... ▾  
**Who is the most successful stock advisors in India? – Equitics ...**

About Featured Snippets   Feedback

**Latest Performance Report for:**  
<https://www.equitics.in/>

Report generated: Tue, Jun 9, 2020 10:47 AM -0700  
Test Server Region: Mumbai, India  
Using: Chrome (Desktop) 75.0.3770.100,  
PageSpeed 1.15-gt1.3, YSlow 3.1.8

  
**Performance Scores**  
PageSpeed Score **F(25%)** ▾   YSlow Score **C(72%)** ▾

  
**Page Details**  
Fully Loaded Time **8.6s** ▾   Total Page Size **7.40MB** ▾   Requests **123** ▾

- The issue of collapsing tables and reviews panel when resizing the window should be fixed on the MarketSmith website.

Activities Firefox Web Browser Jun 7 4:20 PM

MarketSmith India - Stock Market Tips | Research | Analysis - Mozilla Firefox

PS1-PPT - Goog Week2 - Diary: f WhatsApp Fundamental A SWINGTrader In MarketSmith In What does Sens open interest -

https://marketsmithindia.com/mstool/landing.jsp#/

**MARKETSMITH INDIA**

Stock Name/Code  Search

Product Education Support About Us Account

UPCOMING EARNINGS REPORT

Company	Earning Due Date	Industry Name
Titan Industri...	08-06-2020	Retail/Whlsle-Jewelry
Gujarat State...	08-06-2020	Utility-Gas Distribution
Pvr	08-06-2020	Leisure-Movies & Related
Themis Medi...	08-06-2020	Medical-Generic Drugs
K M Sugar Mills	08-06-2020	Food-Misc Preparation

Previous [1] 2 3 4 5 Next  
...  
15

UPCOMING ECONOMIC EVENTS

Event Date	Event Day	Country	Event
07-06-2020	Sun	China	Exports YoY MAY
07-06-2020	Sun	China	Imports YoY MAY
10-06-2020	Wed	U.S.	Fed Interest Rate Decision
10-06-2020	Wed	China	Inflation Rate MoM MAY
10-06-2020	Wed	China	PPI YoY MAY

Previous [1] 2 3 4 Next

BILLISH OF THE DAY

TALK TO MARK

Activities Firefox Web Browser Jun 7 4:20 PM

MarketSmith India - Stock Market Tips | Research | Analysis - Mozilla Firefox

PS1-P Week WhatsApp Fundamental A SWINGTrader In MarketSmith In What does Sens open interest -

https://marketsmithindia.com/mstool/landing.jsp#/

**MARKETSMITH INDIA**

UPCOMING EARNINGS REPORT

Company	Earning Due Date	Industry Name
Titan Industri...	08-06-2020	Retail/Whlsle-Jewelry
Gujarat State...	08-06-2020	Utility-Gas Distribution
Pvr	08-06-2020	Leisure-Movies & Related
Themis Medi...	08-06-2020	Medical-Generic Drugs
K M Sugar Mills	08-06-2020	Food-Misc Preparation
20 Microns	08-06-2020	Chemicals-Specialty
Eih Associate...	08-06-2020	Leisure-Lodging
Adroit Infotech	08-06-2020	Comm Svcs-Consulting
Chalet Hotels	08-06-2020	Leisure-Lodging

UPCOMING ECONOMIC REPORT

Event Date	Event Day	Country	Event
07-06-2020	Sun	China	Exports YoY MAY
07-06-2020	Sun	China	Real Estate Dvlpmnt/Ops
07-06-2020	Sun	China	Imports YoY MAY
07-06-2020	Sun	China	Comm Svcs-Market Rsrch
07-06-2020	Wed	U.S.	Fed Interest Rate Decision
10-06-2020	Wed	China	Food-Misc Preparation
10-06-2020	Wed	China	Inflation Rate MoM MAY
10-06-2020	Wed	China	Oil/Gas-Energy/Mktg
10-06-2020	Wed	China	PPI YoY MAY
10-06-2020	Wed	China	Leisure-Products
11-06-2020	Thu	U.S.	PPI MoM MAY
11-06-2020	Thu	U.S.	Apparel-Clothing Mfg
12-06-2020	Fri	India	Inflation Rate YoY MAY

BILLISH OF THE DAY

- The Gmail and Facebook APIs can also be added for signing up on the website.

The image displays two side-by-side screenshots of a user registration form. The left screenshot shows a 'Create Account' section with fields for 'Username' (with placeholder 'Your Email ID'), 'Password', 'Confirm Password', and 'Mobile Number' (with placeholder 'Mobile Number (For alerts. Not mandatory)'). It also features a 'Create Account' button and social login options for 'Login with Gmail' and 'Login with Facebook'. The right screenshot shows a similar form with fields for 'Full Name', 'Email', 'Password', 'Confirm Password', 'Country' (set to 'India (+91)'), 'Mobile Number', and 'Referral Code (Optional)'. It includes an 'I agree to the Terms and Conditions' checkbox and a large orange 'REGISTER' button.

- Using PortfolioSmith to analyse one's portfolio on MarketSmith is also an optimal use of the tools and could be very useful for the clients. Marketsmojo has integrated a portfolio analyser in its services.
- Unlike Stock Edge, in which the general market news is mentioned in the same website, one needs to be redirected to Investors Business Daily to get the news regarding the stock updates.
- The mobile applications for MarketSmith are available both on Google Play and iOS, but the reviews are quite mediocre.
- Though the making notes and watchlists don't seem to be a decision making factor between Stock Edge and MarketSmith, it is yet another setback in the MarketSmith Website.

After detailed analysis of all the other major platforms in the market, we have discovered a few areas where our company might have been lacking. We feel that by implementing even some of these, the online services provided by William O'Neil can be made more user-friendly, robust and optimized.

## **4. Features added to the model website**

We proposed a few features missing in MarketSmith India's website along with a few shortcomings of the existing website. We provided some recommendations to improve the website's responsiveness, user-interface and functionality. In the following sections, we have elaborated on the changes made or features used, the languages and frameworks employed to write them and the overview of the process.

### **4.1 Navigation**

#### **4.1.1 Problems discussed:**

- Developing the main front page of the website MarketSmith India.

#### **4.1.2 Developed a login button with google,facebook APIs**

- Open Source Github Repository:
- <https://github.com/raghav-jeogani/firstpage>

#### **4.1.3 Technicalities:**

- We have used different colors and patterns in CSS to bring out the new design.
- We have also added some new hovering features in CSS to the buttons and changed the alignment wherever it is required.
- We have used the flexbox layout in CSS, in which the text and styling can be edited very easily.

#### **4.1.4 Overview:**

- We have changed the background photo on the opening page.
- We have changed the basic design and theme of the website's front page.
- We have added also added the respective links to the buttons to download the app on both play store and apple store.

#### **4.1.5. Languages & methods:**

- Javascript
- HTML5
- CSS3

## 4.2. Login Page with Google, Facebook API buttons

### 4.2.1. Developed a login button with google,facebook APIs

- **Website:**
  1. <https://pavan-aeturi.github.io/loginPage>
- **Open Source Github Repository**
  1. <https://github.com/pavan-aeturi/loginPage>
- **Languages & methods**
  1. Javascript
  2. HTML5
  3. CSS3
  4. OAuth API call to google and facebook's developer console.
- Used github pages infrastructure to host my website.

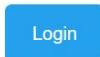
### 4.2.2. Technicalities:

- I have used css animations to simulate a modal.
- I have used javascript and html to render the functionality and markup of a webpage.
- I have used google ,facebook OAuth clients to add their signature buttons without breaking their policies such as hallmark symbols.

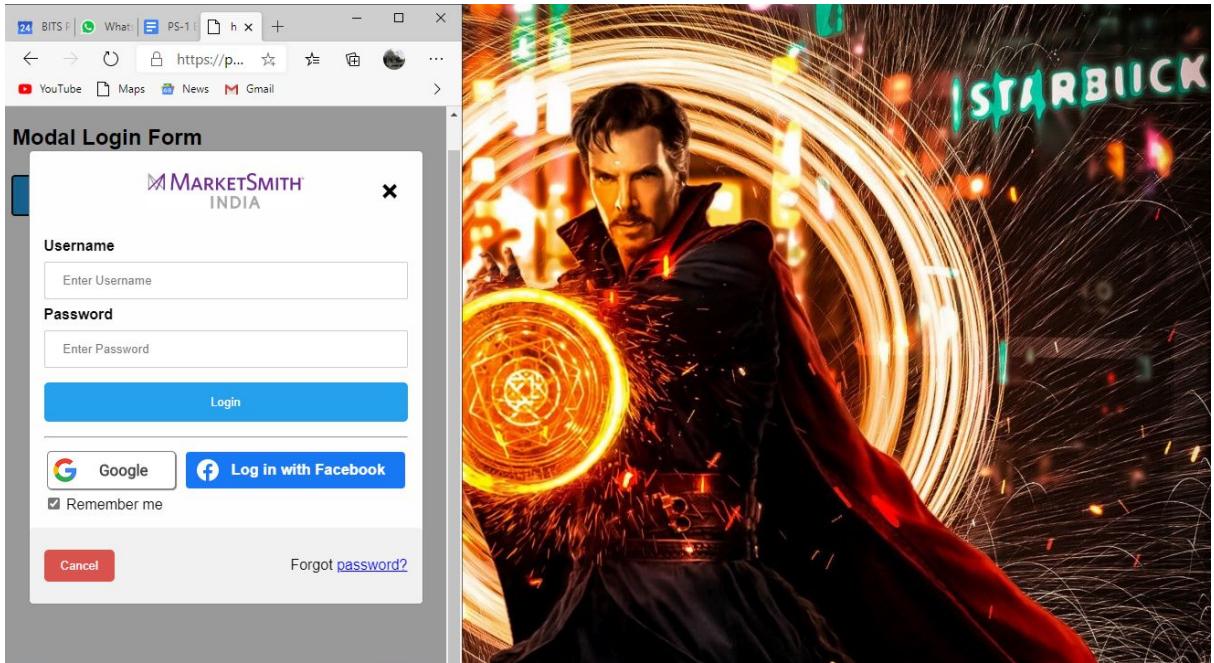
### 4.2.3. Overview:

- It is a modal login Form.

#### Modal Login Form



- It is responsive.



- It is user friendly

Modal Login Form

**MARKETSMITH INDIA**

Username  
Enter Username

Password  
Enter Password

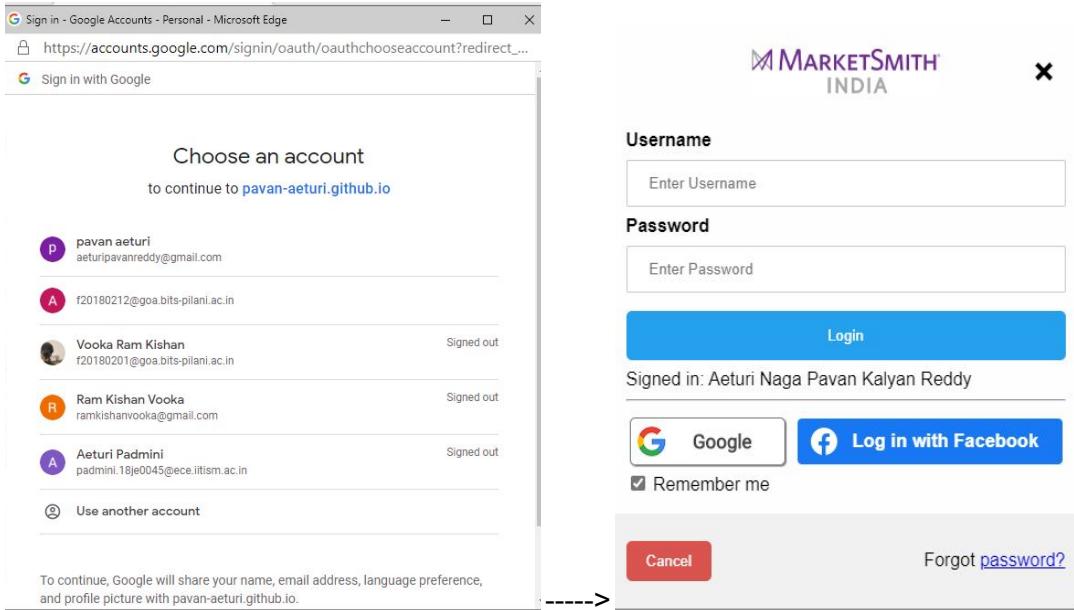
**Login**

**Google** **Log in with Facebook**

Remember me

**Cancel** [Forgot password?](#)

- Mainly it has Google,Facebook OAuth buttons integrated for easy User login



#### 4.2.4. Final Remarks and improvements:

- We can use the apis extensively if our domain and project gets verified by google or facebook which needs privacy policy etc.. to be accepted.
- We can add a database to store the clients password and usernames securely.

### 4.3. Integrating responsiveness to some of the base components of the website

#### 4.3.1. Recreated the base design of the MarketSmith website

- **Website:**
  1. <https://guptasonakshi.github.io/ps-website/pssite/index.html>
- **Open Source Github Repository**
  1. <https://github.com/guptasonakshi/ps-website/>
- **Languages & methods**
  1. HTML5

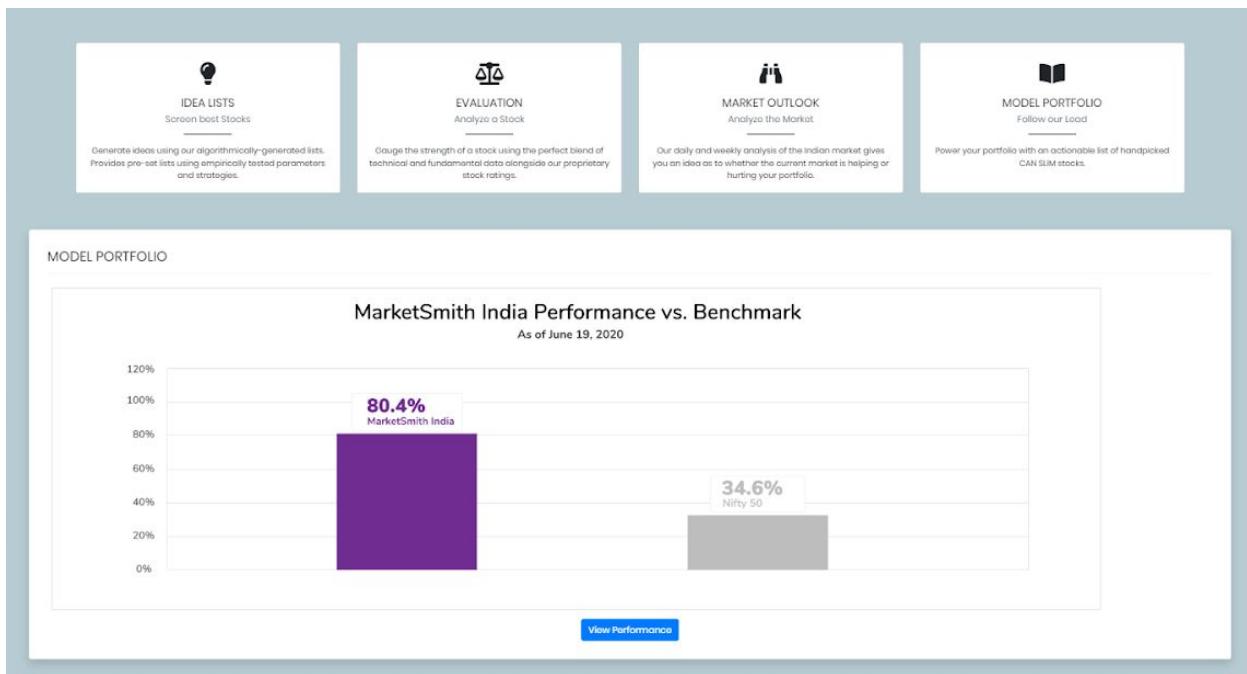
- 2. CSS3
- 3. The open-source framework Bootstrap 4
- Used GitHub Pages infrastructure to host the website.

#### 4.3.2. Technicalities:

- Recreated the webpage elements from scratch using HTML5, CSS3 and the CSS framework Bootstrap 4
- Used media queries to ensure website responsiveness
- Utilized Bootstrap 4's utility classes for user friendly interface and responsive design
- Tested the website on different screen sizes using Google Chrome's development tools

#### 4.3.3. Overview:

- We developed the homepage for the model website, keeping in mind a modern and minimalist design.



WHAT WE DO

- Investment ideas**  
Our methodology brings great ideas into focus. We cut through market noise to deliver actionable investment ideas.
- Picking great stocks**  
We are driven by a passion of picking great stocks. Our team of experts cultivates client partnerships that produce results.
- Generation of ideas**  
We generate ideas so that you can generate alpha. For over 50 years, our superior stock picks have helped portfolio managers outperform their peers.

HAVE A QUESTION

OUR TEAM OF ANALYSTS IS ALWAYS READY TO HELP YOU. PLEASE POST A QUERY USING THE LINK BELOW.

[POST A QUERY](#)

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- We added subtle styling effects like the box-shadow for the containers of the elements that added to the aesthetics of the design without compromising on accessibility.
- We also added microinteractions such as hover-effects for a better viewing experience.

**IDEA LISTS**  
Screen best Stocks

Generate ideas using our algorithmically-generated lists. Provides pre-set lists using empirically tested parameters and strategies.

**EVALUATION**  
Analyze a Stock

Gauge the strength of a stock using the perfect blend of technical and fundamental data alongside our proprietary stock ratings.

**MARKET OUTLOOK**  
Analyze the Market

Our daily and weekly analysis of the Indian market gives you an idea as to whether the current market is helping or hurting your portfolio.

**FIG. A SHADOW APPEARS BEHIND THE CARDS ON HOVERING**

- We utilized Bootstrap's custom utility and component classes, such as `.d-{breakpoint}-{value}` for hiding or viewing a section on a particular screen-size only and `.card-deck` to create a group of unconnected cards.

```

10  <body>
11      <div class="container-fluid">
12          <div class="card-deck text-center">
13              <!-- <div class="col-sm-3"> -->
14              <div class="card">
15                  <i class="fas fa-lightbulb"></i>
16                  <div class="card-body">
17                      <h5 class="card-title">IDEA LISTS</h5>
18                      <h6 class="card-subtitle mb-2 text-muted">Screen best Stocks</h6>
19                      <hr>
20                      <p class="card-text">Generate ideas using our algorithmically-generated lists.</p>
21                  </div>
22              </div>

```

**FIG. USING THE CARD-DECK AND CORRESPONDING BOOTSTRAP CLASSES**

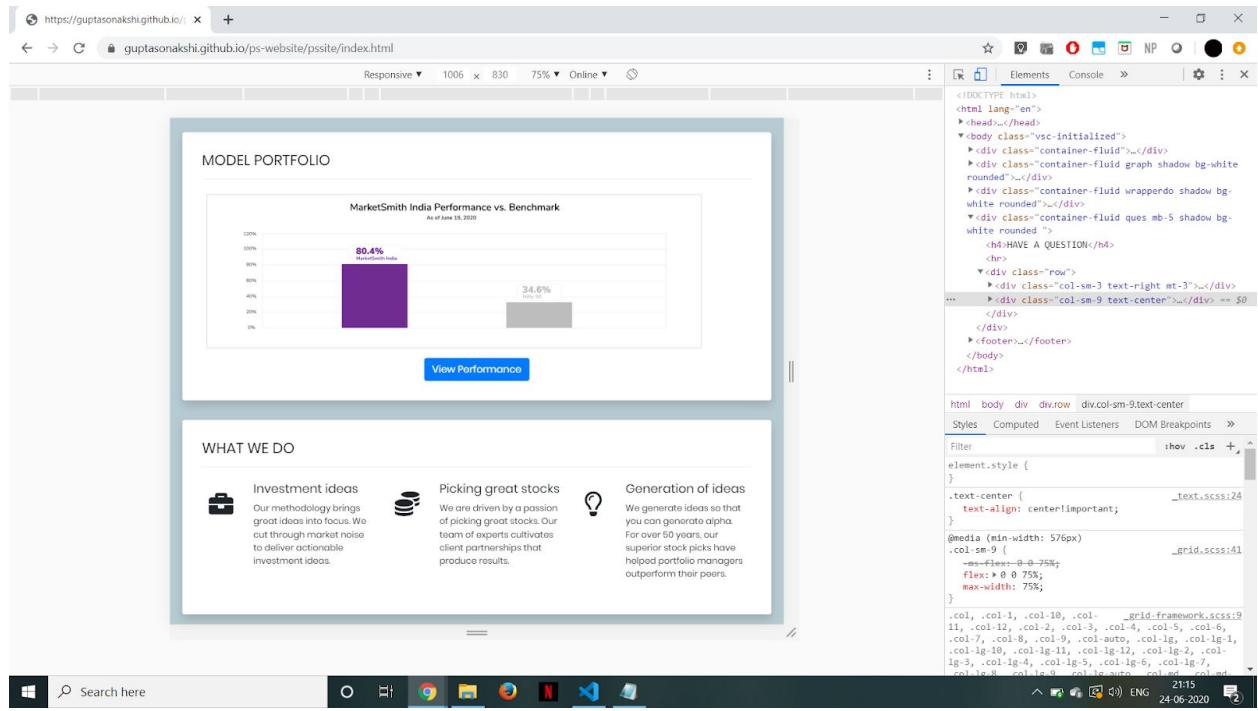
```

59      <div class="container-fluid graph shadow bg-white rounded">
60          <h4>MODEL PORTFOLIO</h4>
61          <hr>
62          <div class="row text-center">
63              <div class="col-12">
64                  
65                  
66              </div>
67              <div class="col-12">
68                  <a href="#" class="btn btn-primary mt-2">View Performance</a>
69              </div>
70          </div>
71      </div>
72      <div class="container-fluid wrapperdo shadow bg-white rounded">
73          <h4>WHAT WE DO</h4>
74          <hr>
75          <div class="row p-2">
76              <div class="do col-sm-1 text-center">

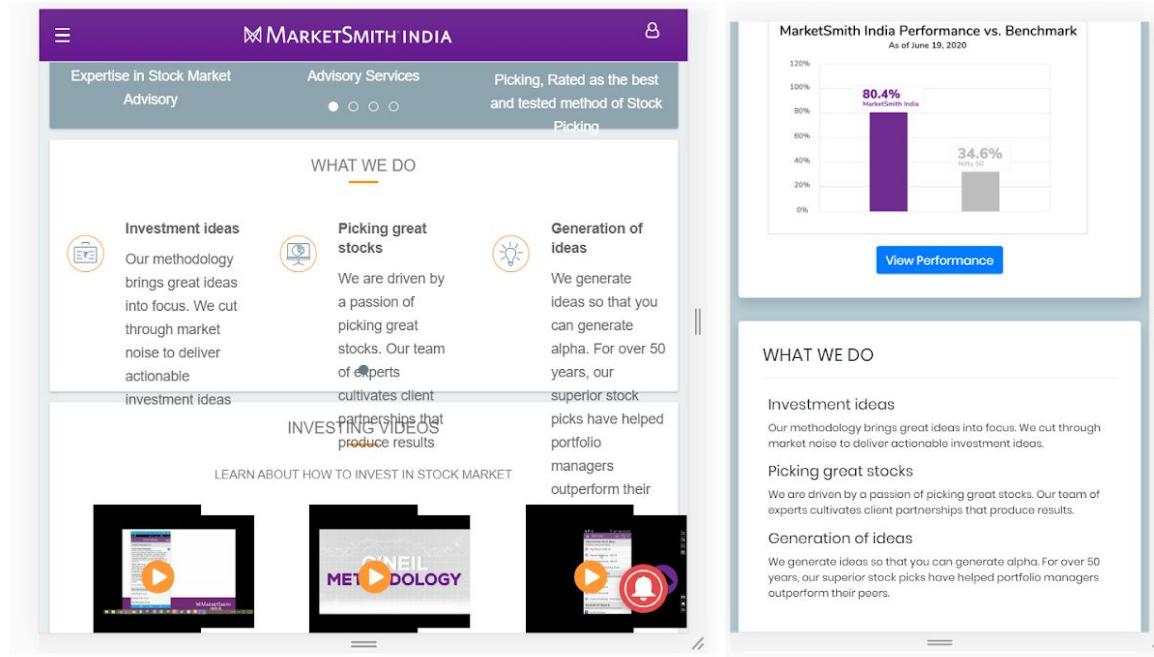
```

**FIG. USING THE 'HIDDEN' CLASSES LIKE D-NONE**

- It was ensured that the website design would be responsive and user-friendly.



**FIG. USING CHROME'S DEV TOOLS TO CHECK RESPONSIVENESS**



**FIG. FIXED THE ISSUE OF OVERFLOWING TEXT BY MAKING THEM BLOCK-DISPLAY INSTEAD OF INLINE ON SMALLER SCREENS**

#### 4.3.4. Final Remarks and suggestions on project improvement:

- The Carousels on the website also face text-overflowing problems on smaller screen sizes that we didn't address in this report
- The main motive was to ensure a user-friendly, responsive design that also looked modern and consistent.

### 4.4 Screener (with import option and bar type advise)

#### 4.4.1 Developed a Screener with import option and bar type advise:

- **Website:**  
<https://pavan-aeturi.github.io/PS-1-project/>
- **Open Source Github Repository:**  
<https://github.com/pavan-aeturi/PS-1-project/>
- **Languages , Frameworks, modules:**
  1. ES6.
  2. **Environment or platform**
    - NodeJS
  3. **Frontend Framework**
    - React JS
  4. **NPM modules & dependencies**

```

    "dependencies": {
      "@testing-library/jest-dom": "^4.2.4",
      "@testing-library/react": "^9.5.0",
      "@testing-library/user-event": "^7.2.1",
      "bootstrap": "^4.5.0",
      "moment": "^2.27.0",
      "process": "^0.11.10",
      "react": "^16.13.1",
      "react-axios": "^2.0.3",
      "react-bootstrap": "^1.0.1",
      "react-csv": "^2.0.3",
      "react-dom": "^16.13.1",
      "react-loader-spinner": "^3.1.14",
      "react-modal-login": "^1.4.5",
      "react-moment": "^0.9.7",
      "react-plotly.js": "^2.4.0",
      "react-router-dom": "^5.2.0",
      "react-scripts": "^3.4.1"
    },
  },
  "devDependencies": {
    "gh-pages": "^3.0.0"
  }
}

```

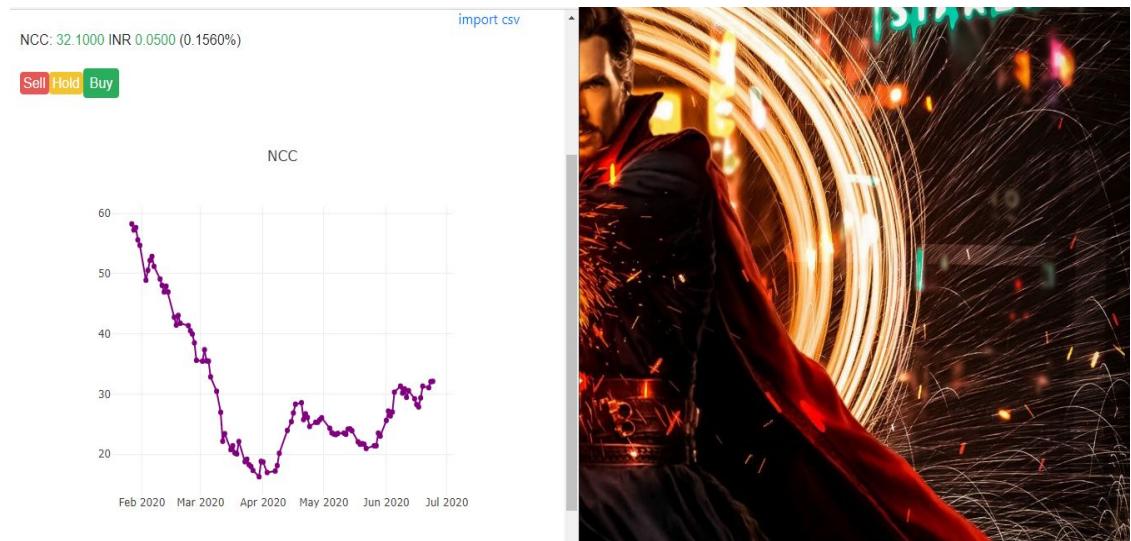
5. HTML5.
6. CSS3.
7. Alpha Vantage Api to get real time data of the stock Market.

#### 4.4.2 Technicalities:

- Used create-react-app module by facebook to install all the boilerplate code for the project.  
<https://github.com/facebook/create-react-app>
- I have used css,react to give a advice to call depending on the stock behaviour
- HTML5 is used to render the content to a webpage.
- Using the node environment helped me find almost all redundant work like integrating navbar,load spinner,search form,ploty graph, social login etc.
- This is mainly due to access to the largest open source software registry platform **NPM**.
- The API calls were limited to 5 calls per minute if on load and little over 500 calls per day.
- The advice call was a pessimistic call if a stock is losing price, sell it else if its gaining price buy it otherwise hold it.
- The search is based on security Id rather than name.
- I have used the github pages infrastructure to host the website.

#### 4.4.3 Overview:

1. It is responsive.



2. It has import csv support where you can import the security data.
  - a. The data imported is extensive compared to described by the graph  
[import csv](#)
  - b. React-csv module is used to create a csv file with data provided by Alpha Vantage API.
3. The screener advises clients with a pessimistic behaviour of a stock.

NCC: 32.1000 INR 0.0500 (0.1560%)

Sell Hold Buy

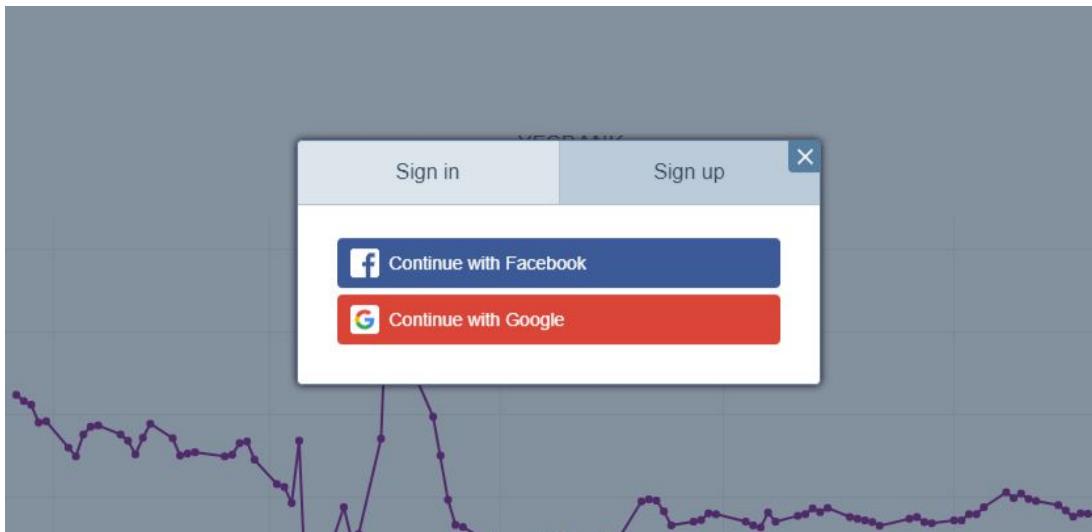
a.

YESBANK: 27.0500 INR -0.5500 (-1.9928%)

Sell Hold Buy

b.

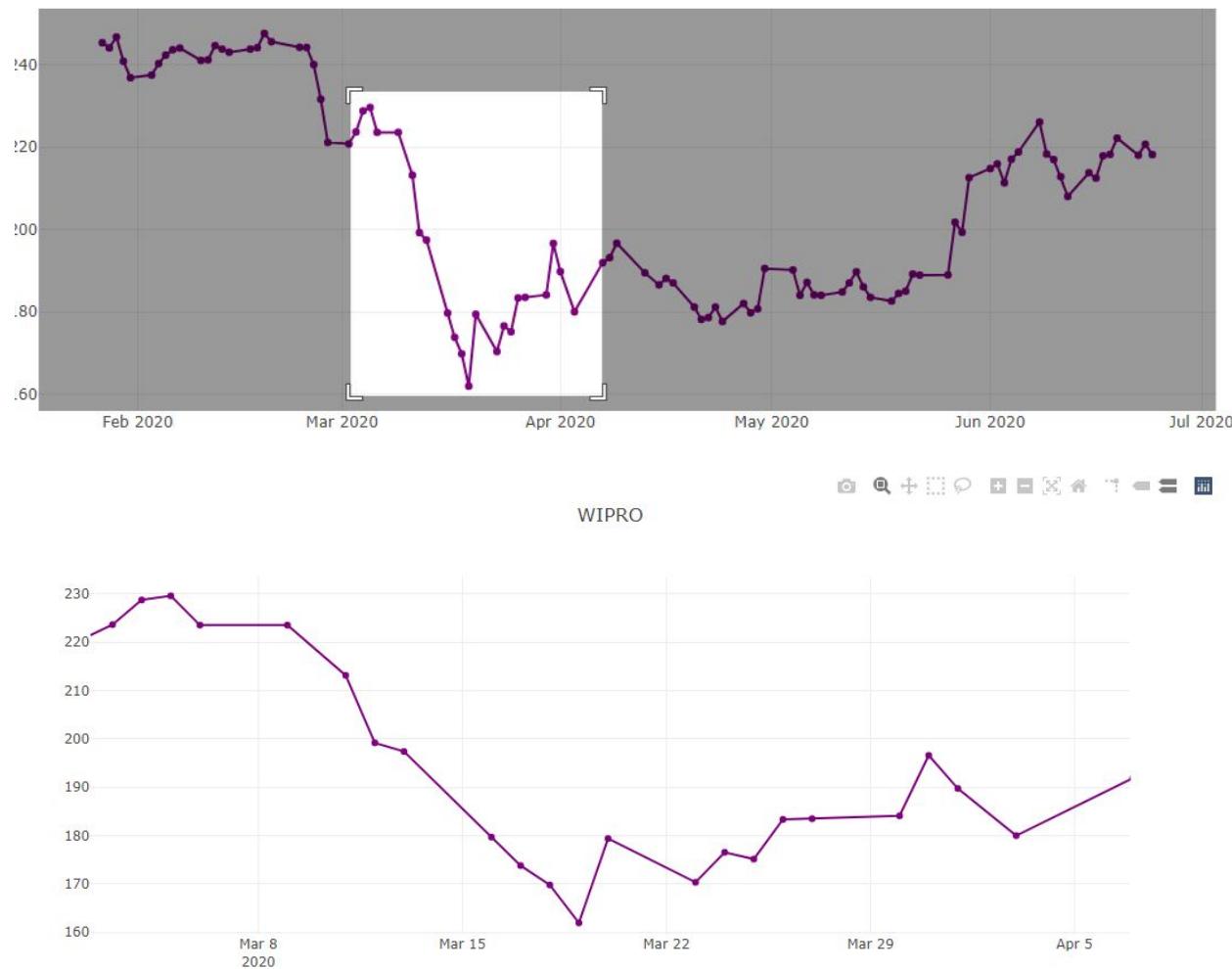
4. The SignIn button is a responsive modal social login without having any OauthClientID integrated just used for frontend purposes .



5. The graph has various features namely:

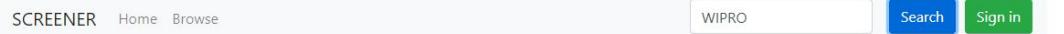


- a. Download a graph png for your presentation.
- b. Zoom in or out
- c. It is responsive and user friendly.
- d. You can pan through the graph.
- e. You can reset the axis.
- f. You can x=zoom and analyse where ever you want.



#### 4.4.4. User-flow:

1. User is supposed to search a stock with a stock id by BSE and click the search button incase user is unaware of id he/she can use the browse option in navbar to search a stock.



2. The webpage soon rendered the last 100 day closing prices of the stock and a [import csv](#) option to import extensive information for analysis and advice appropriately by the method mentioned above.

#### 4.4.5 Final Remarks and suggestions on improvement of project:

- The securities Id should not be only criteria for a user friendly search so creating a database or Hashmap for storing names versus Ids is essential
- The graph and analysis is not extensive use of API.
  1. Given a subscription we can increase the benefits of using the API.
  2. The protocol https is used for API for historical data, we can use websocket protocol to get the realtime data without a refresh by the user but using INTRA\_DAY data for our project with fixed API calls per minute is not savvy for the project.
- Using CANSLIM judgement scored to advise the customers.

### 4.5 Resolving Collapsing Tables

#### 4.5.1 Solved the Issue of Collapsing Tables:

- Website: <https://github.com/bhavesh2799/Marketsmith/blob/master/table.html>
- Open Source GitHub Repository:  
<https://github.com/bhavesh2799/Marketsmith/blob/master/table.html>
- Languages and Methods:
  - 1) HTML
  - 2) CSS3
- Used GitHub pages infrastructure to host my website.

#### 4.5.2 Technicalities:

- To resolve the collapsing problem, we made the tables using the Grid Layout Module of CSS. It offers a grid-based layout system, with rows and columns, making it easier to design web pages without having to use floats and positioning.
- To position the grid cells so that they do not overlap, we used the minmax feature so that there is a set minimum height and width (auto) and a set maximum value.
- For the part with two tables in a line, we used the Flex Layout Module of CSS.
- We incorporated two grids (tables) inside the flex elements and hence we could address the collapsing issue of the two different tables.

### 4.5.3 Overview:

- It is a webpage that consists of broker recommendation tables, which tells about the trending stocks in Indian Market.

The screenshot shows a web page with two main sections: 'UPCOMING EARNINGS REPORT' and 'UPCOMING ECONOMIC EVENTS'. Both sections have a header with a magnifying glass icon and a small orange circle with an 'i'.

UPCOMING EARNINGS REPORT			UPCOMING ECONOMIC EVENTS		
Company	Earning Due Date	Industry Name	Event Date	Event Day	Country
Astra Microwav...	24-06-2020	Elec-Misc Products	25-06-2020	Thu	U.S.
India Cements (...)	24-06-2020	Bldg-Cement/Concrt/Ag	26-06-2020	Fri	India
Esab India (Nse)	24-06-2020	Machinery-Gen Industrial	30-06-2020	Tue	India
Bannari Amma...	24-06-2020	Food-Packaged	30-06-2020	Tue	India
Indoco Remedies	24-06-2020	Medical-Diversified	30-06-2020	Tue	China

Below each table are navigation links: 'Previous', page numbers (1, 2, 3, 4, 5), 'Next', and a total page count of 10.

This is the screenshot taken of the tables which appear on the MarketSmith India webpage when the window is maximized.

But when we minimize the window, the tables tend to collapse in the webpage.

The screenshot shows the same two tables from the previous image, but they are now collapsed into a single row. The 'UPCOMING ECONOMIC REPORT' table is partially visible below the first table's header.

Company	Earning Due Date	Industry Name
Astra Microwav...	24-06-2020	Elec-Misc Products
India Cements (...)	24-06-2020	Bldg-Cement/Concrt/Ag
Esab India (Nse)	24-06-2020	Machinery-Gen Industrial
Bannari Amma...	24-06-2020	Food-Packaged
Indoco Remedies	24-06-2020	Medical-Diversified
Power Finance	24-06-2020	Financial Svcs-Specialty
Asian Granito I...	24-06-2020	Bldg-Constr Prds/Misc
Tide Water Oil I...	24-06-2020	Oil&Gas-Refining/Mktg
Ttk Prestige	25-06-2020	Household Appliances/Wares
Kcp Sugar & Inds.	25-06-2020	Food-Packaged

Event Date	Event Day	Country	Event
25-06-2020	25-06-2020	U.S.	Real Estate Dvlpmnt/Ops
25-06-2020	Thu	U.S.	GDP Growth Rate QoQ Final Q1
25-06-2020	25-06-2020	Leisure-Lodging	Leisure-Lodging
25-06-2020	Fri	India	Foreign Exchange Reserves JUN/1
25-06-2020	25-06-2020	India	Medical-Diversified
25-06-2020	Tue	India	Government Budget Value MAY
25-06-2020	25-06-2020	India	Auto Manufacturers
25-06-2020	Tue	India	Infrastructure Output YoY MAY
25-06-2020	25-06-2020	China	Transportation-Logistics
25-06-2020	Tue	China	NBS Manufacturing PMI JUN
25-06-2020	25-06-2020	China	Real Estate Dvlpmnt/Ops
25-06-2020	Tue	China	Non Manufacturing PMI JUN
01-07-2020	25-06-2020	U.S.	Apparel-Clothing Mfg
Beardsell	25-06-2020	U.S.	Market Manufacturing PMI Final JUN
			Machinery-Gen Industrial

To resolve the collapsing problem, we made the tables using the Grid Layout Module of CSS. It offers a grid-based layout system, with rows and columns, making it easier to design web pages without having to use floats and positioning.

```
9     background-color: #b7cbd3;
10    }
11
12 .table1 {
13   display: grid;
14   grid-template-columns: repeat(10,minmax(auto,200px));
15   grid-template-rows: repeat(8,minmax(auto,40px));
16   grid-row-gap: 5px;
17   grid-column-gap: 10px;
18 }
19
20 .table2 {
21   display: grid;
22   grid-template-columns: repeat(3,minmax(auto,200px));
23   grid-template-rows: repeat(6,minmax(auto,50px));
24   grid-row-gap: 10px;
25   grid-column-gap: 10px;
26 }
27
28 .table3 {
29   display: grid;
30   grid-template-columns: repeat(4,minmax(auto,200px));
31   grid-template-rows: repeat(6,minmax(auto,50px));
32   grid-row-gap: 10px;
33   grid-column-gap: 10px;
34 }
35
36 .table4 {
37   display: grid;
38   grid-template-columns: repeat(2,minmax(auto,800px));
39   grid-template-rows: 80px minmax(auto,100px);
40   grid-row-gap: 20px;
41   grid-column-gap: 50px;
42   justify-items: center;
43 }
```

Along with that, for the part with two tables in a line, we used the Flex Layout Module of CSS.

```
59
60 .flex1 {
61   display: flex;
62   flex-direction: row;
63   justify-content: space-evenly;
64 }
```

This resulted in forming the tables that would not collapse on minimizing the window.

Below is the full-screen screenshot of the tables in the modified webpage we created.

UPCOMING EARNINGS REPORT			UPCOMING ECONOMIC REPORT			
Company	Earning Due Date	Industry Name	Event Date	Event Day	Country	Event
Johnson Contr.	23-06-2020	Hsahole-Appliances/Wares	25-06-2020	Thu	U.S.	GDP Growth Rate QoW Final Q1
Asian Paints	23-06-2020	Chemicals-Paints	25-06-2020	Fri	India	Foreign Exchange Reserves JUN/19
Berger Paints India	23-06-2020	Chemicals-Paints	30-06-2020	Tue	India	Government Budget Value MAY
BSL	23-06-2020	Apparel-Clothing Mfg	30-06-2020	Tue	India	Infrastructure Output YoY May
Bhagyanagar India	23-06-2020	Electrical-Power/Equipmt	30-06-2020	Tue	China	NMS Manufacturing PMI JUN

And when we minimized the webpage the tables and it's content remained intact.



#### 4.5.4 Final Remarks and suggestions on Project Improvement:

- The pagination feature could have been added, but we needed to address the issue on collapsing tables, so reduced the difficulty of the project accordingly.
- We could work on the backend of the content of the table, to get a regular updated trend of Indian stocks.

## 5. Conclusion

We reviewed some prominent features that were missing on MarketSmith India's website compared to other competitor's websites and chose the frontend designs to implement in our model website. We didn't focus on any features that required backend development since that was beyond the scope of this project. It is important to note that we also worked on improving the responsiveness of the website as that was one of the shortcomings of MarketSmith's website.

The MarketSmith website needs to get more optimized, as can be seen from the performance comparison report between the three websites that we included earlier in the report. Another feature should be a separate section showing broker recommendations based on return on call. There should be a redirected page where customers can use their own strategies and algorithms to implement new ideas and learn from them. A peer comparison chart was also missing but it is useful because it will help make intuitive decisions made by beginners a bit more logical.

Working on this project was a collaborative effort and each of us divided the work amongst ourselves for greater efficiency. The website components we designed can be viewed via the websites mentioned in the report. We hope that we were able to help in making an already great service a little better.

## 6. References

- <https://marketsmojo.com>
- <https://sensibull.com>
- <https://www.quora.com/Who-is-the-best-stock-advisor-in-India>
- <https://www.youtube.com/watch?v=8yBjyC3ixt0&feature=youtu.be>
- <https://gtmetrix.com/compare/dCEXMj3X/Tj0KoCVB>
- <https://gtmetrix.com/compare/dCEXMj3X/Tj0KoCVB>
- [https://youtu.be/\\_vyvOE7JKw](https://youtu.be/_vyvOE7JKw)
- <https://www.quora.com/Is-anyone-using-the-MarketsMojo-site-It-looks-very-impressive-Can-we-directly-invest-in-their-portfolio-stocks>
- <https://rakesh-jhunjhunwala.in/forum/threads/has-anyone-tried-markets-mojo-site.2773/>
- <https://stockedge.com/>
- <https://trendlyne.com/>
- <https://www.adigitalblogger.com/trading-platforms/stock-edge/>
- <https://gtmetrix.com/reports/trendlyne.com/6iwmtfGG>
- <https://thecalminvestor.com/fundamental-analysis-tools-india/>
- <https://gtmetrix.com/reports/stockedge.com/ia0S3TyY>
- <https://www.screener.in/>
- <https://www.equitymaster.com/>
- <https://www.npmjs.com/>
- <https://github.com/>
- <https://reactjs.org/>
- <https://github.com/facebook/create-react-app>
- <https://www.alphavantage.co/documentation/>
- [https://www.w3schools.com/css/css\\_grid.asp#:~:text=The%20CSS%20Grid%20Layout%20Module,to%20use%20floats%20and%20positioning.](https://www.w3schools.com/css/css_grid.asp#:~:text=The%20CSS%20Grid%20Layout%20Module,to%20use%20floats%20and%20positioning.)
- <https://www.w3.org/TR/css-flexbox-1/#:~:text=The%20specification%20describes%20a%20CSS,to%20avoid%20overflowing%20the%20parent.>
- <https://console.developers.google.com/apis/>
- <https://developers.facebook.com/>
- <https://getbootstrap.com/docs/4.5/components/card/>
- <https://getbootstrap.com/docs/4.5/utilities/display/#hiding-elements>
- <https://github.com/>
- <https://fontawesome.com>
- [https://www.w3schools.com/w3css/w3css\\_templates.asp](https://www.w3schools.com/w3css/w3css_templates.asp)
- <https://fonts.google.com/>
- <https://github.com/>