Tradeview — Master Log

Project slug: SV
Current cycle: C01
Started: 2026-01-03

> This log is the running version history. Append new entries to the end. Each entry ID
> uses: `SV-<CYCLE>-<YYYYMMDD>-<NNN>`.

Index

SV-C01-20260103-001 — Log initialized

Type: Docs
Context: Establish master log + indexing standard
Change summary: Created initial Master_Log.md scaffold and PDF styling/build scripts
Rationale / tradeoffs: Markdown source enables consistent PDF rendering + easy diffing
Files touched: `docs/master_log/*, scripts/build_master_log.*`
Commands run: N/A
Verification: N/A
Notes: Install Node + md-to-pdf (or choose another renderer) to build PDF
Concepts: @concept:master-log @concept:indexing-standard

SV-C01-20260106-001 — Watchlist sigma metrics + portfolio analytics

Type: Feature
Context: Improve usability + demo polish for portfolio/social sharing
Change summary: Added watchlist snapshot tables (compact/detailed) with 52-week range and sigma-distance metrics; added portfolio analytics (equity curve vs SPY, drawdown, allocation, basic risk stats); improved handling of missing quotes so holdings don't show misleading $0 pricing.
Rationale / tradeoffs: Kept changes lightweight and resilient by reusing existing cached provider functions (Yahoo/Stooq) and keeping calculations in small helpers. Equity curve is an approximation using daily Close data and end-of-day positions, which is "demo-grade" but credible for showcasing data/UX patterns.
Files touched: `app.py, README.md, docs/master_log/Master_Log.md, docs/master_log/Master_Log.pdf`
Commands run: `python -m compileall . ; powershell -ExecutionPolicy Bypass -File scripts/build_master_log.ps1`
Verification: Navigated Dashboard/Markets/Portfolio; verified watchlist metrics render with partial symbol failures; verified portfolio analytics render with at least one holding and compares vs SPY when data available.

Notes: Sigma distance uses (σ_{usd,252} = Last × stdev(daily pct returns, 252 sessions)); daily Close-based analytics may differ from real broker marks/fills.
Concepts: @concept:watchlist-metrics @concept:portfolio-analytics @concept:market-data-cache

SV-C01-20260106-002 — Rebrand to Tradeview + UI polish

Type: Feature / Refactor
Context: Preparing app for social media portfolio showcase; user requested rebrand, responsive improvements, and reduced chart flicker
Change summary:

- Renamed app from "Cashbook Lite" to "Tradeview" (page title, sidebar, hero, README)
- Added Volume and Avg Vol (20D) columns to watchlist snapshot
- Improved watchlist table responsive scaling (CSS width rules)
- Reduced chart flicker: increased refresh interval to 3s, pre-allocated chart container height, added skeleton placeholder CSS
- Added color-coded returns (🟢/🔴 emoji indicators) and P&L formatting
- Added CSS media queries for tablet/mobile breakpoints
- Added fade-in animations for hero, metrics cards, symbol banner, and chart block
  Rationale / tradeoffs: Used emoji indicators for color-coding since st.dataframe doesn't support HTML in cells; 3s refresh interval balances "live feel" with reduced layout shift; animations are subtle (0.4-0.5s) to avoid feeling sluggish
  Files touched: `app.py`, `README.md`, `docs/master_log/Master_Log.md`, `docs/master_log/Master_Log.pdf`
  Commands run: `streamlit run app.py`
  Verification: App boots; branding shows "Tradeview"; watchlist includes Volume; chart container doesn't collapse during refresh; animations play on page load
  Notes: True incremental chart updates (WebSocket-style) not possible in vanilla Streamlit; mitigations reduce perceived flicker significantly
  Concepts: @concept:ui-polish @concept:responsive-design @concept:animations

SV-C01-20260106-003 — Sigma Slice Analysis Tool

Type: Feature
Context: User requested flexible sigma analysis tool that allows arbitrary time range selection instead of fixed 52-week window
Change summary:

- Added intraday data support (1m, 5m, 15m, 1h intervals) with appropriate caching (10s TTL vs 20s for daily)
- Implemented `compute_slice_sigma_metrics()` for arbitrary time range sigma calculations
- Added dual-handle range slider on Markets page for selecting analysis window
- Added stats panel showing slice mean, std dev, high/low, and current price's sigma distance
- Added visual shading on chart (Plotly vrect) for selected slice region
- Added collapsible "Key Levels" panel showing day/week/52-week highs, lows, and volume
- Added edge case handling: empty slice warnings, intraday data limit warnings, >3σ alerts
  Rationale / tradeoffs:
- Used Streamlit's native `st.slider` with 2 values for range selection (simpler than custom Plotly drag-lines)
- Slider operates on bar indices (not timestamps) for simplicity across all intervals

- Intraday data has Yahoo limits (1m: ~7d, 5m/15m: ~60d, 1h: ~730d) - UI warns users
- Stats panel placed alongside chart for easy comparison
  Files touched: `app.py`, `README.md`, `docs/master_log/Master_Log.md`, `docs/master_log/Master_Log.pdf`
  Commands run: `streamlit run app.py`
  Verification:
- App boots without errors
- Range slider appears below chart on Markets page
- Selecting a range shades that region on the chart
- Stats panel updates with sigma metrics for selected range
- Intraday intervals (1m, 5m, 15m, 1h) fetch correctly
- Key Levels panel shows day/week/52w highs and lows
- Edge cases handled (empty slice, insufficient data)
  Notes: Sigma calculations use price std dev (not returns std dev) for the slice, making it directly comparable to price distances. For returns-based volatility, see the 52-week metrics in the watchlist.
  Concepts: @concept:sigma-slice @concept:intraday-data @concept:volatility-analysis

SV-C01-20260108-001 — README refresh + deploy hygiene

Type: Docs / Fix
Context: Final polish before publishing; align documentation with current UX and keep local data out of GitHub/Streamlit Cloud.
Change summary: Updated README to match the current app behavior (live refresh is opt-in, no chart HUD overlay, sigma stats tied to visible window); removed the "Recommended next improvements" section; added `.gitignore` rules to exclude local DB and dev artifacts (including `portfolio.db`).
Rationale / tradeoffs: Keeping the README accurate improves credibility for a portfolio demo. Git-ignoring the local SQLite ledger avoids accidentally publishing personal paper-trading activity and matches Streamlit Cloud's ephemeral filesystem model.
Files touched: `README.md`, `.gitignore`, `docs/master_log/Master_Log.md`, `docs/master_log/Master_Log.pdf`
Commands run: `powershell -ExecutionPolicy Bypass -File scripts/build_master_log.ps1`
Verification: Confirmed README no longer references removed UI elements; verified master log PDF rebuilt successfully.
Notes: Streamlit Community Cloud doesn't provide durable local disk; if persistence is desired later, use an external DB or add import/export.
Concepts: @concept:deploy-hygiene @concept:docs @concept:paper-ledger

SV-C01-20260108-002 — Add README demo video link

Type: Docs
Context: Improve portfolio presentation and make the repo self-explanatory for first-time viewers.
Change summary: Added a "Demo video" section to the README with a clickable thumbnail that links to the YouTube walkthrough.
Rationale / tradeoffs: GitHub READMEs don't reliably render inline video players; a thumbnail link is the most compatible, low-friction way to showcase the app.
Files touched: `README.md`, `docs/master_log/Master_Log.md`, `docs/master_log/Master_Log.pdf`
Commands run: `powershell -ExecutionPolicy Bypass -File scripts/build_master_log.ps1`

Verification: Confirmed the thumbnail renders in GitHub Markdown and opens the YouTube URL when clicked.

Notes: If the thumbnail is too large for fast loading, consider replacing it with a smaller JPG/PNG export (same aspect ratio).

Concepts: @concept:demo-video @concept:docs