Client: John – Portfolio Manager

Hi Manish,

I hope you are doing well. We are looking to improve our stock analysis reports and transition from basic charts to more advanced visual dashboards.

Specifically, we want to focus on stock price movements over time, comparing performance across sectors and individual companies.

It would also be beneficial to filter by various factors like stock symbols, industries, and time periods. Additionally, we often compare stock performance against market indices, so I've included historical index data in a spreadsheet.

Our primary focus will be on the past 4 years of data, and I would like a dashboard that allows for easy comparison. Let me know if you need any further details.

Best regards, John