Stock App User Guide

In order to use the Stock App, please follow the link below. The link will take you to the Stock App homepage.

https://group5-capstone-project.web.app/

While at the homepage, you can navigate to the following links and functionalities:

- Stock App - Always shown and links to the home page when clicked.
- About page - Always shown and links to the About page which shows a quick background on the team and our application.
- Stock ticker search bar - gives the user the ability to search stock price using a ticker symbol
- Login page - provides the user the ability to login using Google Auth.
- Market Fear and Greed Index indicator
  - Fear indicates that investors are selling which generally drives prices down.
  - Greed indicates that investors are buying which generally drives prices up.

The functionalities available to the user once logged in using Google Auth are below:

1) Generate a portfolio - By clicking the Generate Portfolio option, users are linked to a form that provides the user with options to select their preferred investments. This include the following choice categories:
- Risk Tolerance - Conservative, Moderate, and Aggressive
- Preferred investment type - Growth Stocks, Dividend stocks, ETFS, Crypto, and REITS
- Industries to exclude - Oil & Gas, Tobacco & Alcohol, Weapons & Defense, Gambling & Casinos, Crypto & Blockchain
- Investment goal - short (1-3 years), medium (3-10 years), and long term (10+)
- Portfolio mix - Mostly stocks, Balanced Mix (Stock & ETFs), More ETFs
- Market Drop Strategy - Buy, Hold, Consider Selling, Quickly Sell
- Micromanagement Strategy - Hands-off, Monitor and adjust, Active research and frequent trading.

Once a portfolio is generated, the user is shown a successful portfolio creation notification and redirected back to the homepage. The user can look at the created portfolio recommendation by clicking the portfolio link at the top right of the page which then shows a pop-up of the recommended portfolio.

2) Market Trends - By clicking Market trends while at the Homepage, the user is redirected to the news page with a list of relevant news pertaining to the recommended portfolio.

- Each listed news shows a quick sentiment indicator that summarizes the overall sentiment of the news.
- Clicking "Read more" redirects the user to an external link.
- Each news item listed is also stored as inbox items. After the news items are stored, a small notification is shown to the user that news has been added to the inbox.
- The user can click the inbox and see the items that have been added. The user can also click delete to remove news items from the inbox.

3) Detailed Stock Info - By clicking this functionality, users are redirected to a search tool for a stock's company profile and displays key metrics. It also displays a gauge that summarizes many analyst's buy/sell opinions on a stock.

- The user can use the search bar to search for a ticker symbol (stocks only). For convenience. The user can click the portfolio button to see a list of recommended stocks, and search for that symbol through the search bar.
- The user is then presented with basic company info, financials, dividends, analysis, and historical data.
- A gauge is also presented that simplifies analyst recommendation for the stock through a buy/sell gauge.

4) Once a user is done, the user can click the Logout button on the top right to logout from the application which redirects the user to the Homepage.

Frequently asked Questions:

1) Can I create multiple portfolio recommendations?

Currently, there is no capability to create multiple recommendations. The previous recommendation will be overwritten by a newly generated recommendation.

2) The search functionalities or market news does not show any data.

This could happen if the backend server is still restarting from cold start. Please wait a few seconds. Another possible reason is the API might be down.

Troubleshooting:

1) In case the app is not returning any data during the search, it could be that the backend server is still cold as we are using a free tier service. Please wait a few seconds and try conducting a search again. If still not operational, the server might be down. Another possible reason is the API is down.

2) If a user cannot login using Google Auth, the user needs to create a Google account.