

Phase 3 to 4 Handoff

Phase 3 → Phase 4 Handoff Document

Purpose: Define exactly what Phase 4 must consume from Phase 3 and what new structures Phase 4 builds.

What Phase 4 Receives:

- BacktestResult structure with returns, metrics, trades.
- RiskReport structure with risk metrics and risk rails.
- Fully functional analytics pipeline callable via `run_backtest_with_risk`.
- Stable interfaces and schemas.

Phase 4 Responsibilities:

- Build Thesis JSON schema (drivers, disconfirmers, expression, dates, status).
- Build Observation schema and DB storage model.
- Define Scenario schema for later scenario engine.
- Create Pydantic models for all schemas.
- Implement database migrations for thesis, observation, scenario tables.

Integration Points:

- Phase 4 schemas must align with Phase 3 output fields.
- Future LLM modules will rely on these schemas for structured reasoning.