

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.