FINANCIAL SERVICES

CONTENTS

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Introduction

We have conducted an analysis of the top fifty companies with the highest market capitalization (MarketCap) in the USA Stock Market. Market capitalization is a key-value indicator used to evaluate company's equity. Our analysis focuses on these fifty companies and uses the market cap indicator to gain a better understanding of the American corporate landscape.

Our analysis spans the financial performance of these fifty companies from March 2018 to January 2024. In order to have a more accurate analysis we have extracted key data points, such as opening and closing prices, the company's sector, and the highest and lowest prices reached during the day.

Q Demonstration

"Q" is a tool within QuickSight that enables interactive questioning on the dashboard, allowing users to ask questions and receive answers based on the data in the analysis.
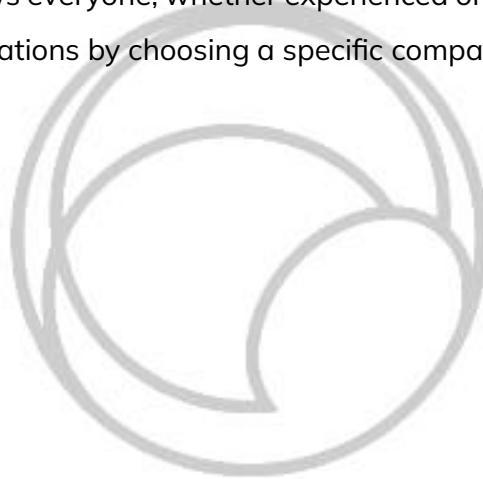
Tested Question Templates:

2. How many distinct companies are there in each sector?
3. How many unique companies by industry?
4. Which companies have the lowest closing prices?
5. Which company has the highest close price?
6. Total volume by sector

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Storytelling:

The Stock Exchange stands out as the epicenter of the financial market when it comes to the global financial landscape. Companies and investors interact in a vast network of daily real-time transactions. There is a diversity of stocks with values ranging from cents to thousands, determined by market movements and trends.

Considering this dynamic scenario, where data is changing daily, we decided to analyze the financial behavior of the fifty top companies with the highest market capitalization. This analysis is intuitive and allows everyone, whether experienced or beginners in the field, to track the highs and lows of corporations by choosing a specific company or sector.
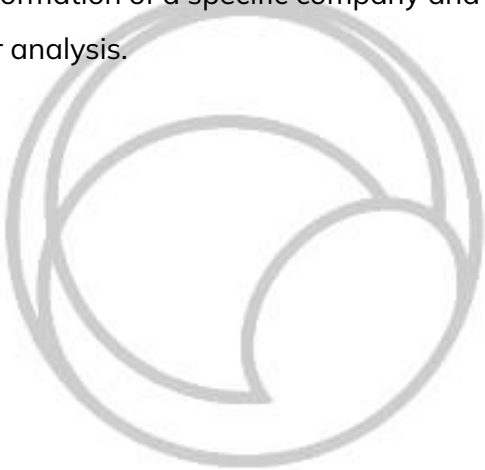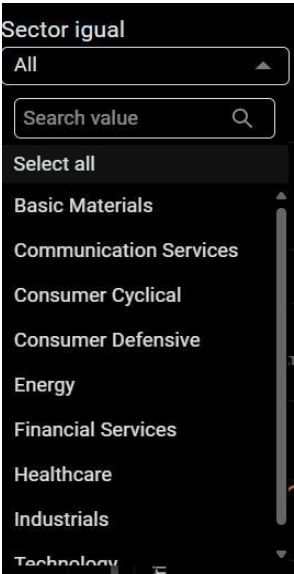
Charts' Overview

1 Company Table:

This table filters subsequent dashboard views. It displays the names of fifty companies listed on the American Stock Exchange and allows individual or group selection for a more detailed analysis

Insight: This feature works as an interactive tool for users to filter information of a specific company and track which companies are available for analysis.
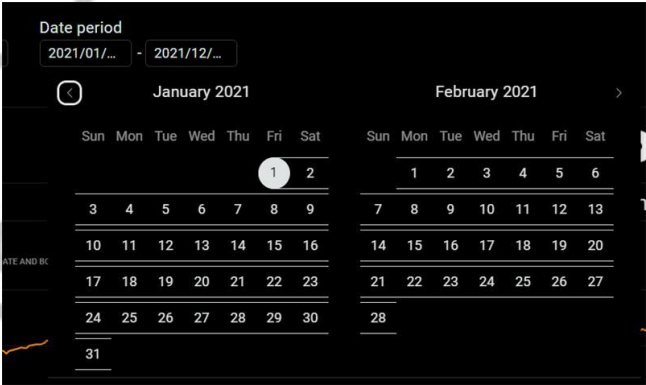
The available filters include:

Filter by Sector: Which allows an user to visualize companies based on the their industry.

Insight: To work as an interactive feature. It allows users to filter sector information, enabling them to track which companies belong to each sector and observe their development over time.

Filter by Date:

This graph is dynamically updated according to the filters.

Insight: It's an interactive feature that users can choose the time period they wish to visualize.
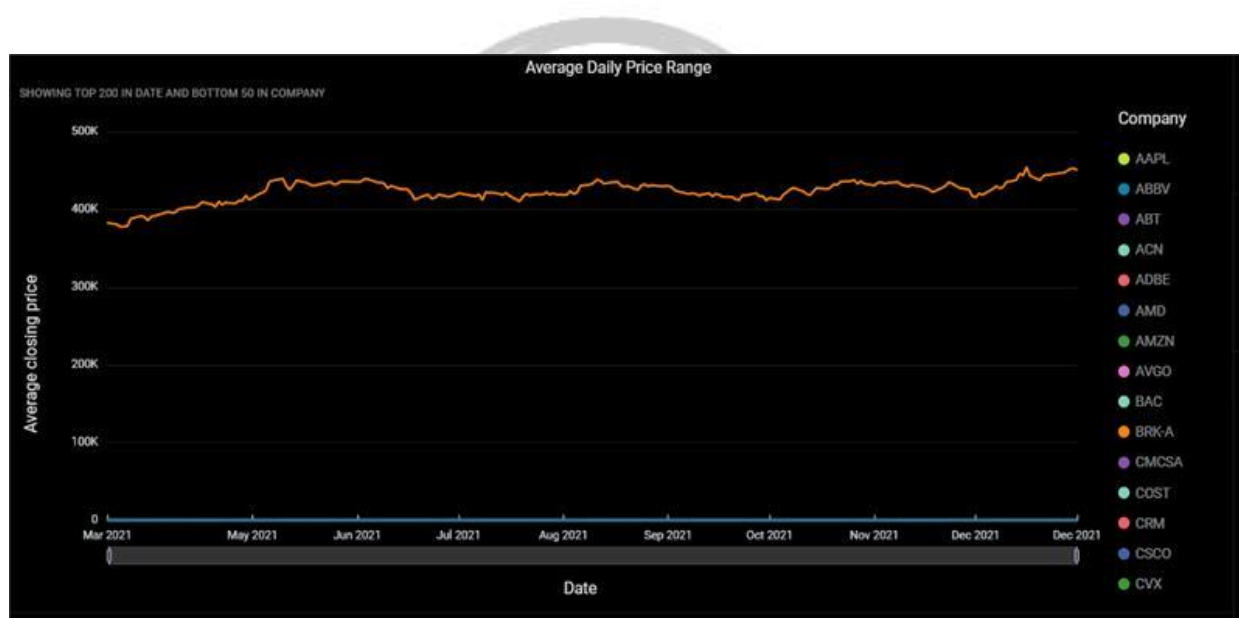

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2   Line Graph: Daily Closing Price Variation

This graph shows the daily variation in the closing prices of selected companies stock.

Included key features:

Filter by Sector and Date: This graph is dynamically updated based on applied filters chosen by the user.

Individual Selection: Clicking on a company on the left table displays the specific variation for that company in the graph. The user can also click on the companies on the right to visualize a highlighted interactive display as the one shown below.
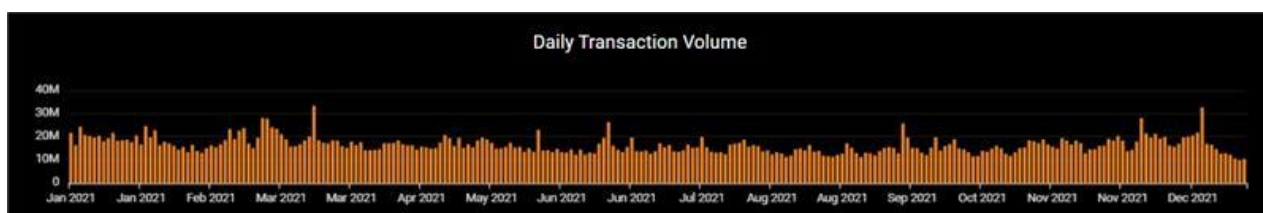

Insight: To monitor daily closing prices variation of stocks, either by individual company or grouped by sectors. These significant daily fluctuations underscore the volatility of these major companies and carry important implications for both short and long-term investors.

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3. Line Chart: Daily Transaction Volume Variation:

This chart presents the daily variation in transaction volume of selected company stocks.

Included Features:

Synchronized Filter: It dynamically updates according to the filters that are applied in the line chart.
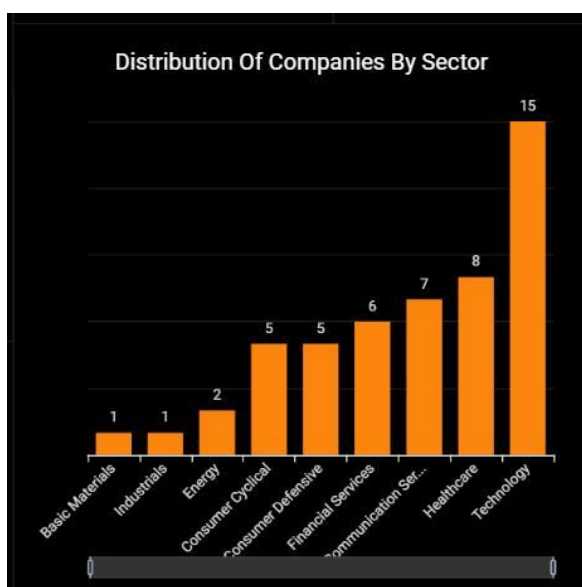

Insight: It indicates market interest in the selected company's stocks. A sudden increase in volume may suggest a higher volatility period. This could be associeated with unexpected events or significant announcements that impact stock prices.

Indica o interesse do mercado nas ações da empresa, e o aumento repentino no volume pode indicar um período de maior volatilidade. Isso pode ser associado a eventos inesperados ou anúncios importantes que afetam o preço das ações.

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4. Vertical Bar Chart: Sector Distribution:

It displays how the companies are distributed by industry sector. This chart is unnafected by filters, however it provides an overview of how the market is composed.

Insight: Tracking the distribution of the top fifty companies across sectors reveals an uneven distribution. Based on the chart, the Technology sector had the highest number of companies with fifteen, followed by Health sector with eight companies and the Communication Services with seven companies. On the other hand, Basic Materials and Industrials had one company each, while the Energy sector had only two companies. This concentration suggests that market trends are heavily influenced by the economic conditions of the dominant sectors, namely Technology, Health and Communication.

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5. KPIs (Key Performance Indicators):

Beta: It measures the relative volatility of a stock compared to the market. (A beta of one indicates the stock has same volatility as the market. A beta above one indicates higher volatility, while below one indicates lower volatility.

Lowest Price: It indicates the lowest stock price in a particular period, or the cheapest stock when filtered by sector.

Highest Price: It indicates the highest price of a stock, or the most expensive stock when the sector filter is being used.

Opening Average: It displays the average of stock opening values in a particular period.

Closing Average: It refers to the average of stock closing values in a particular period. Média de Fechamento: Média dos valores de fechamento das ações naquele período.

All KPIs are updated based on the filters applied in the companies' table and the date and sector filters.
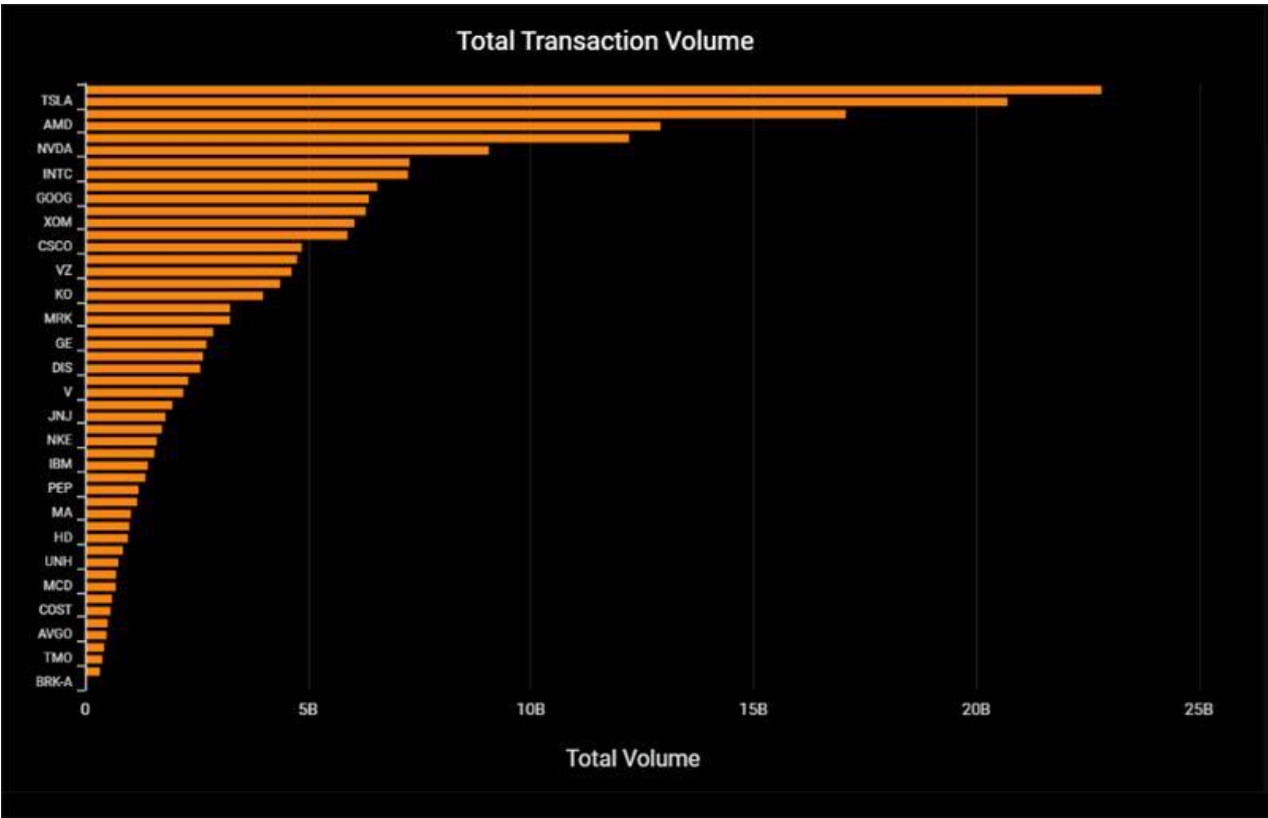
Beta	Highest Price	Lowest Price
0.99	$ 455.910,...	$ 29,40

Open Price	Close Price
$ 8.418,69	$ 8.415,65

Insight: Highlighting important stocks metrics.

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6. Horizontal Bar Chart: Total Transaction Volume:

This chart displays the sum of transaction volumes for each company over a specific period. The sector and date filters affect this chart when applied.
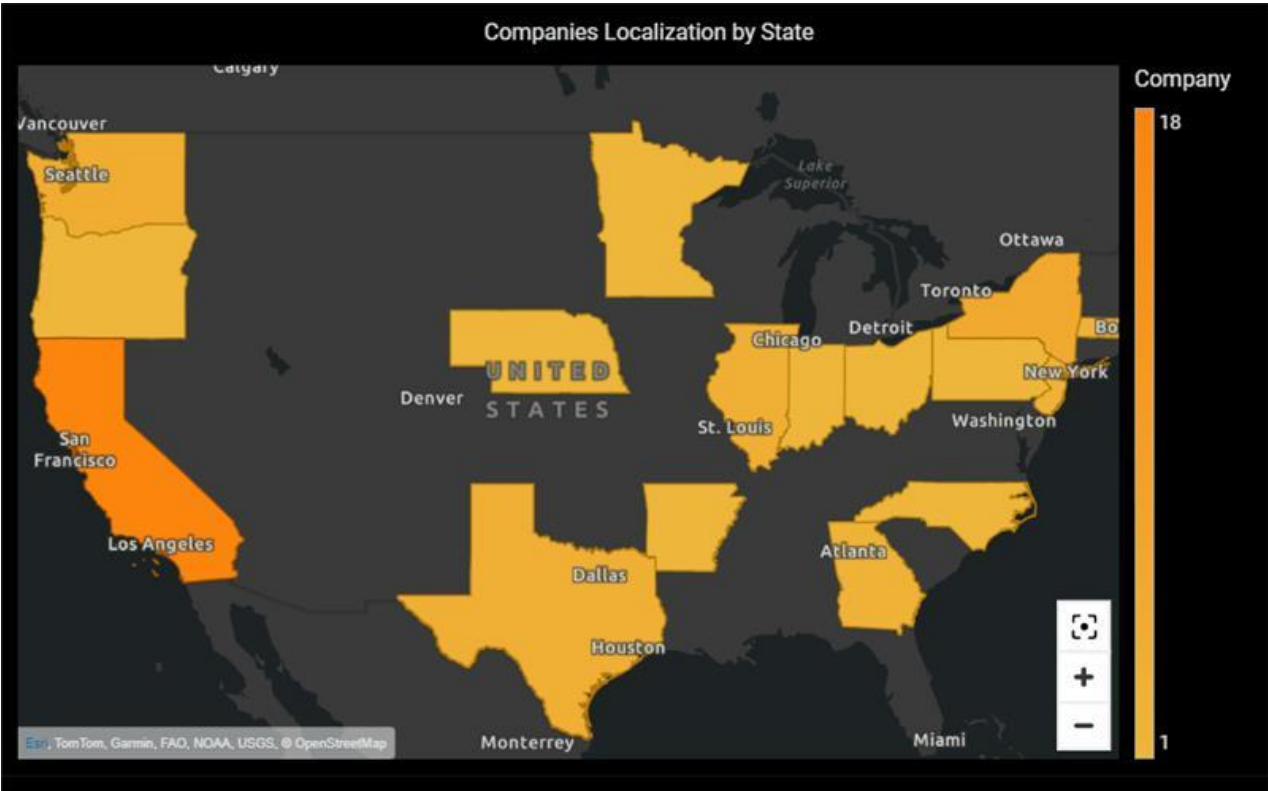

Insight: This metric can help track the total volume of stock transactions within the selected sector during the period from 2018 to 2024.

7. Company Location Map:

This map displays the geographical location of the selected companies's headquarters. When the sector filter is applied it affects the map.

Insight: It is used to see the company's geographical location.

Dataset information:

- Number of Columns: 15

- Number of Rows: 65.254

- Data Type: string, integer, date, float

- Data Source: API Financial Modeling Pre, Yahoo Finance

- Last Update: 03/04/2024