

Financial Portfolio Management

R-chitects

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The financial portfolio management dashboard is a comprehensive tool designed to empower the asset manager

Key Questions for Potential Retail Investors

The role played by the asset manager

Desired Result

- 1. Which are the stocks that should I invest in?
- 2. How much should I invest in each of these stocks?



Designing a blue-chip stock portfolio for an average retail investor is systemic and laborious Portfolio
recommendations
based on user's
goals and risk
profile

Our dashboard will facilitate this process efficiently, allowing the manager to focus on innovative solutions

The dashboard performs a holistic review of the investor's key questions to arrive at an optimized portfolio recommendation

Desired Result Key factors as input The Dashboard Historical performance of **Optimized** stock portfolio Growth trends and forecasts recommendations The financial portfolio Price risk of the stock curated to the management is designed user's goals and Risk appetite of the investor to bridge the gap via risk profile **Expected ROI** real-time data analysis

Advising retail investors will be made more effective and efficient

Problem Overview

The features can be leveraged to effectively advise the investor on a range of investment decisions

Optimize Explore Forecast Optimized solution curated to Functionality 4 different investor profiles: Maximize ROI Review the historical Growth trends & forecasts for the S&P 50 stocks1 performance of the stock Minimize Risk **Diversified ROL** Balanced Portfolio Customization features to application End-user To study specific stocks cater diverse investor profiles To identify **shorting**/ To discuss preliminary **hedging** opportunities selection of stocks while Generate randomized pitching to potential clients portfolios to meet the investor's expectations The most pivotal and functional feature² of the dashboard

Dashboard Demonstration

Functionality & Business

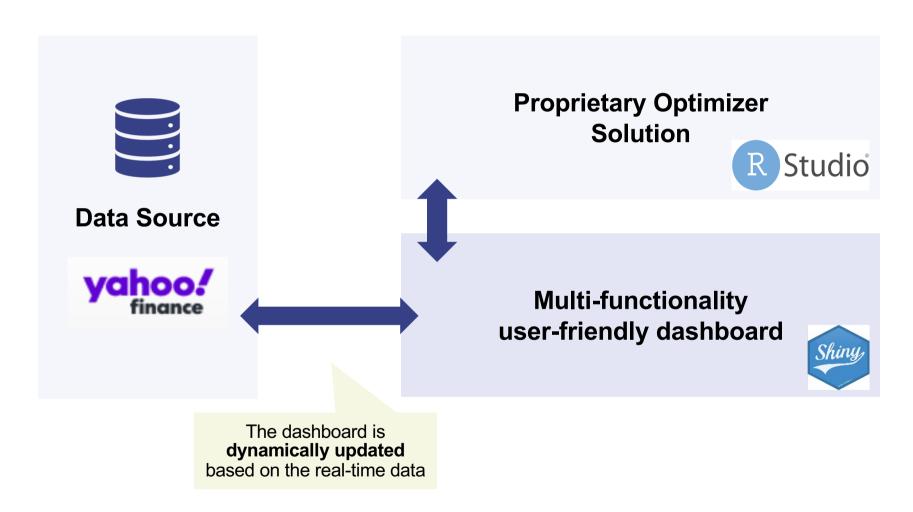
Impact

Advancing Forward

Problem Overview

^{1.} S&P top 50 stocks as on 11th October are considered

The solution has been designed on a robust platform that generates a portfolio assortment in real-time



Find us at



https://github.com/abhinav314/rchit ects_ur4a/blob/master/UI_rchitects v1.5.R



https://kk1994.shinyapps.io/R-Chitects/



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Investing made simpler

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