



Development of the Portfolio Management Game

Master Project

UNIVERSITY OF ZURICH - DEPARTMENT OF BANKING AND FINANCE

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1. Motivation

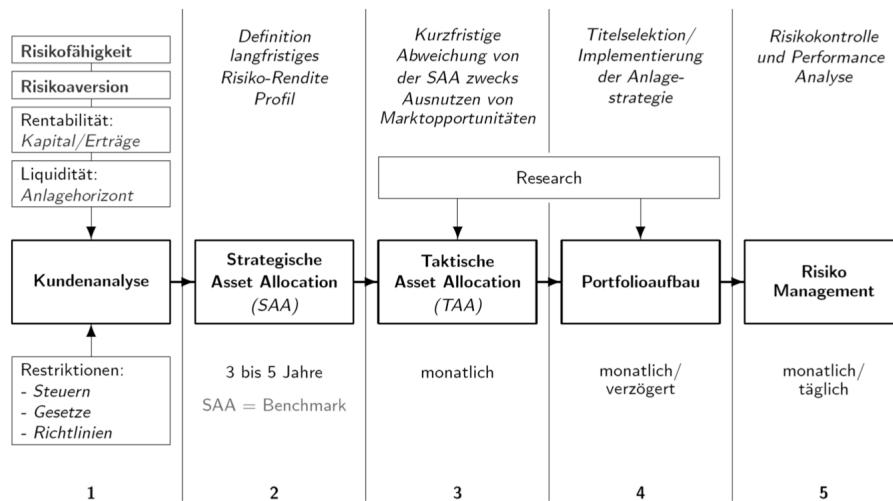
The Portfolio Management Game is a simulation thought to.....

Both members of the project team work at the Department of Banking and Finance UZH as web developers parallel to their studies achieving their Master's degree in Informatics. Both interested in developing applications from scratch and analyzing the procedure of financial processes. By re-developing the application the Department of Banking and Finance wants to achieve a sustainable simulation of a typical portfolio management process. The simulation should help the students within their learning process by focussing on practical decision making, building up on their theoretical knowledge.

2. Project Description

The "Portfolio Management Game" was initially developed in 2001 by an external company for the Department of Banking and Finance at the University of Zurich. This simulation of a portfolio manager was being used from the DBF over several years by multiple seminars of their department. A course named "Advanced Portfolio Seminar" has given insights to the portfolio management process for Master students by playing the game in between different rounds playing the game. For the final seminar of the "Executive Education" the game was being played for two days on Uetliberg with all the executive students.

The game has been deprecated by its implemented technologies and after each round the supervisors had to collect a USB-stick where all decisions of the students have been saved to. The supervisors had to collect this data for each group on a central device with administrative access (on a windows native application) to calculate the result of the teams decisions.



3. Methodology

Different tools helped us to understand a typical investment process to model the game best for a proper learning of the students. Those tools are described in this section.

4. Architecture

3.1. Requirements Engineering

The typical requirements engineering builds the base of our engineering design process. By creating user stories we had a common basis to define the requirements together with our principals from the DBF. As usual when defining user stories we classified those stories into following three categories: Nice-to-have, Should-have, Must-have. Additionally they are structured into different functional or organizational parts. All the stories can be found in the appendix.

3.2. User Interviews

Interviews with professionals and other people Understanding of the overall process

3.3. Observation of Game Execution

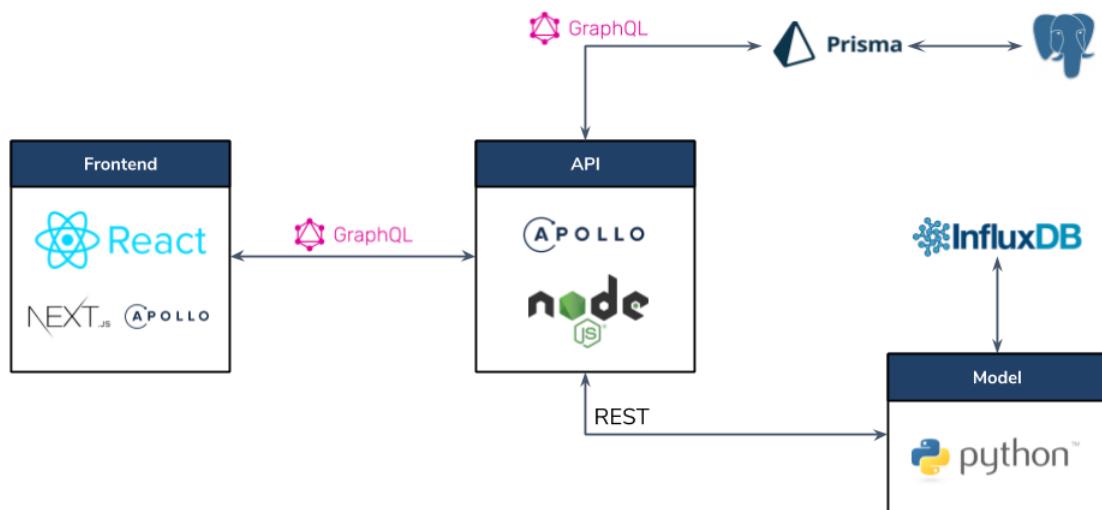
The game observation was separated in following parts:

- Executive Education Students Observation during their final seminar at the Uetliberg
- Observation of different knowledges in one room
- Master Seminar: Advanced Portfolio Management Seminar

3.4. Design and Iterative Prototyping

...

4. Architecture



4.1. Frontend

We use the React Framework which is developed by Facebook. Based on NextJS.

4.2. API

Bla

4.3. Model

All calculations of the simulation are performed in a python-model which interacts with the time series data stored on an InfluxDB. A Restful service fetches the data from the model.

4.4. Continuous development

5. Market Model

6. Application Overview

For playing the game an administrator of a specified game and an infinite number of teams have to interact together for playing this simulation.

6.1. Administration

All administrative tasks will be described in this part.

6.1.1. Administrator login

An administrator needs to have a login for having all administrative functionalities. Therefore he has to provide his credentials on the following screen which he reach by following the instructions on the start page.

The screenshot shows a login form titled "Portfolio Management Game". It contains two input fields: "Email" with the value "pascal.zehnder@bfuuzh.ch" and "Password" with the value "****". Below the password field is a "Submit" button. At the bottom of the page, there is a dark blue footer bar with the text "© Department of Banking and Finance UZH".

6.1.2. Game management

Game overview As landing page of the administrator the game overview exists. It serves as the control center of the game administration.

6. Application Overview

The screenshot shows the 'Game List' section of the application. On the left is a sidebar with navigation links for 'Users', 'Games', and 'Entities'. The main area shows two game entries: 'My Game' (Running) and 'Lustiges Game' (Running). Each entry includes a 'Details' button.

Game creation For creating a game the administrator needs to define some parameters for playing a game which are structured into three tabs. By pressing on the "next"-button the administrator will be leaded through the form. Some tooltips help users to understand the purpose of the provided input. After submitting the creation of the game, the user will be redirected to the game overview.

The screenshot shows the 'Game Creation' form. It features three tabs: 'Game Details', 'Period Settings', and 'Customer Types'. The 'Game Details' tab is active, containing fields for 'Game Name' (Advanced Portfolio Management Seminar), 'Game Identifier' (apm19), 'Description' (HS19), and 'Number of participating teams' (8). A 'Next' button is located at the bottom right of the form.

Game detail The game detail for each game may be accessed over the game overview list. In this page a user can initialize period, start periods, having an overview about the teams submission and many other features, which will be described in this part:

Game initialization As the game creation may be done in advance we have splitted the game creation from the game initialization, such that last adjustments of the game may be done just before the start of the game.

The screenshot shows the 'Game: "Advanced Portfolio Management Seminar"' detail page. It displays the 'Game Details' tab with fields for 'Initial Customer Types' (Fixed Income) and 'Initial Customer Count' (10000). A prominent green 'Initialize Game' button is located at the bottom right.

Game start By starting the game the students or teams are finally able to start with their period 0 decisions. Administrators are able to give them some help over messages which will be visible for the teams in their report section.

6.1. Administration

Game: "Advanced Portfolio Management Seminar"

Game Identifier: apm19 Initial Customers: 10000 Simulation Type: Historical

Period Length: 30 days Start Date of Period 0: 2000-01-01

Period 0 (SAA) | Period 1 | Period 2

Economic Outlook

To view the economic outlook for the upcoming period, view the report on...

Messages

Add guiding or misleading messages to the economic outlook of each team (e.g., from the bank CIO or a newspaper).

+ Add new message

Start Period

Team overview For providing access for all teams an administrator has an overview about the team logins, which are generated automatically when initializing the game.

Team Name	Login	Password
Team 1	team1	Snd3ly3W
Team 2	team2	u2NIVD0X
Team 3	team3	9FWWxqA74
Team 4	team4	hIPRpoMO
Team 5	team5	dauWAmuD
Team 6	team6	YALRyRWE
Team 7	team7	hITWxQJl
Team 8	team8	8OivP1r4

Running game Overview about the submission state of all teams. The administrator is able to get an insight about the decisions of all submitted teams. The period can only be finished if all teams submitted and therefore the state of the teams has been green.

Game: "Advanced Portfolio Management Seminar"

Game Identifier: apm19 Initial Customers: 10000 Simulation Type: Historical

Period Length: 30 days Start Date of Period 0: 2000-01-01

Period 0 (SAA) | Period 1 | Period 2

Teams

- Aulus Bull > Last submitted: 21.12.2018 17:49
- Team 2
- Team 3
- Team 4
- Students Kantonialbank > Last submitted: 21.12.2018 17:51
- Team 6
- Team 7
- Team 8

Finish period

Initializing period After completion of period zero the administrator has to initialize a period in which the team decisions will be compared to the other teams decisions and evaluated. Additionally new customer types for the next period and other settings could be defined in this phase of the game.

6. Application Overview

The screenshot shows the 'Portfolio Management Game - Administrator' interface. On the left, a sidebar lists 'Users', 'Games', and 'Entities'. Under 'Games', it shows 'Game Identifier: apm19', 'Initial Customers: 10000', 'Simulation Type: Historical', 'Period Length: 30 days', and 'Start Date of Period 0: 2000-01-01'. Below this is a timeline with 'Period 0 (SAA)' (green), a grey bar, 'Period 1', another grey bar, and 'Period 2'. A green button at the bottom right says 'Initialize period'. At the top right, there's a user icon and the email 'pascal.zehnder@bfuzh.ch'.

Period start By completing the simulation, respectively evaluation of the previous period, a next period may be started. If the game is still paused the teams cannot access the decisions site. The administrator can define some optional messages which will be displayed in the teams report page. Some adjustments to the simulation results will be edited in this phase of the game.

This screenshot continues the 'Administrator' interface. It shows the same game details and timeline. Below the timeline, under 'Economic Outlook', there's a placeholder text: 'To view the economic outlook for the upcoming period, view the report on ...'. Under 'Messages', it says 'Add guiding or misleading messages to the economic outlook of each team (e.g., from the bank CIO or a newspaper)'. It includes fields for 'Author' (set to 'CIO') and 'Content' with sample text. Buttons at the bottom include 'Delete current message', 'Add new message', and 'Start Period'.

6.2. Team View

6.2.1. Login

The screenshot shows the 'Team View' login screen. At the top, it says 'Portfolio Management Game'. Below is a decorative graphic of a person at a desk with a computer monitor displaying '0 ms', a calculator, and a pie chart divided into four quadrants. The main login area has two options: 'Student' (with a graduation cap icon) and 'Teacher' (with a person plus icon). Both have a 'Continue' button. Between them is the word 'OR'. At the bottom, it says 'apm19' and 'Login'.

6.3. Period 0 decisions

Team Login

team1

Password

Submit

There could be some inconsistencies if your team makes their decisions on multiple devices. Ensure that only one logged in user finally decides about the teams choices. Reports may be viewed on multiple devices without any problems.

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6.3. Period 0 decisions

In period 0 which represents phase 1 of the game, the teams define their SAA for all customer types which are enabled by the administrator of the specific game. The teams need to fulfill the ranges for all dimensions to submit their decisions. Supportive graphs in form of pie charts help the teams to decide about the share of the two dimensions. Additionally the players can name their team on the top left corner of the screen.

Period 0 Team de Gagner Reports SAA TAA Depot Realization Business Administration Save decisions

Customer Types

Fixed Income

Information

- Fund invests only or mostly in money market instruments and bonds. No or almost no investments are made in equities.
- This strategy is suitable for investors who only wish to accept moderate price fluctuations and preserve their capital.
- The returns are based on regular income.

Strategic Asset Allocation

The strategic asset allocation is a portfolio strategy that involves setting a long-term target allocation for various asset classes, whereby the risk/return profile of the customer is taken into account. If the portfolio deviates significantly from the initial setting due to differing asset returns, the portfolio is rebalanced to the original allocation.

	CHF	USD	EUR	JPY	EMD	Total	Min.	Max.
Money Market	10	30	20	0	0	60	50	90
Bonds	0	20	0	0	0	20	0	20
Equity	0	0	10	0	0	20	0	20
Alternative Investments	0	0	0	0	0	0	0	10
Total	20	60	20	0	0	100		
Min.	0	50	0	0	0			
Max.	20	90	20	10	10			

Asset Types

Bonds 60% Money Market 20% Equity 20%

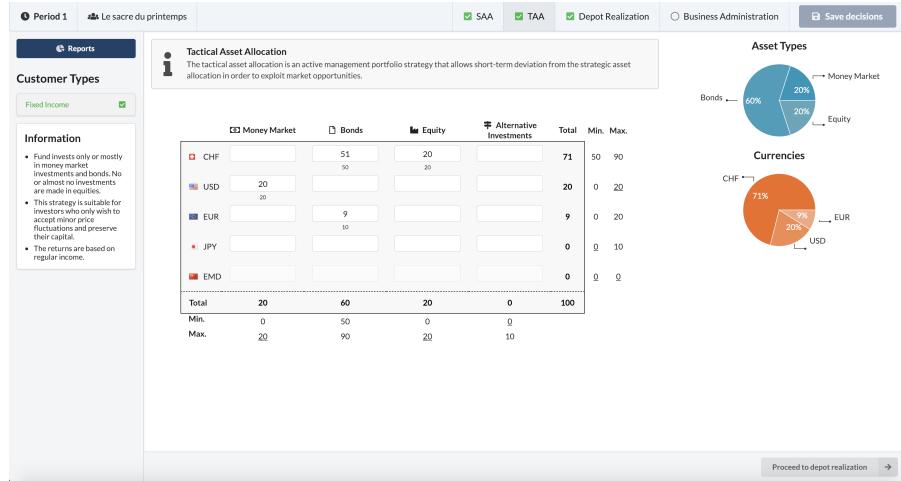
Currencies

CHF 60% USD 20% EUR 20%

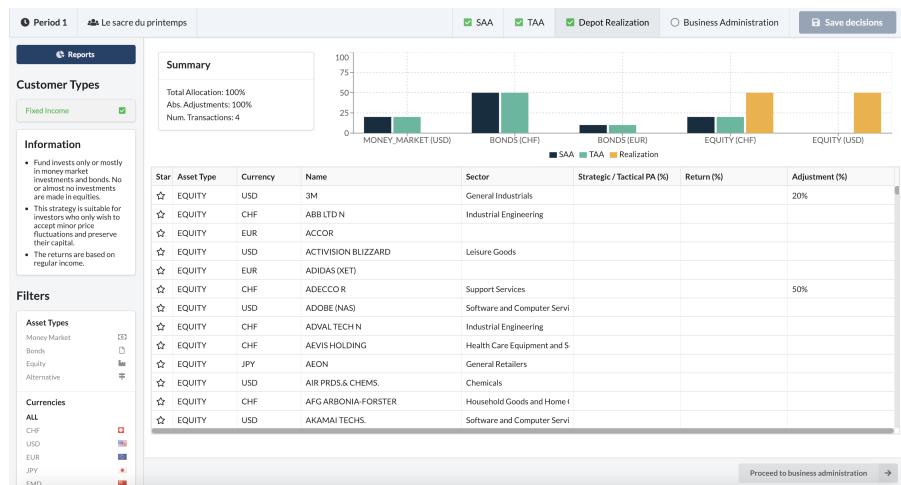
6. Application Overview

6.4. Other periods decisions

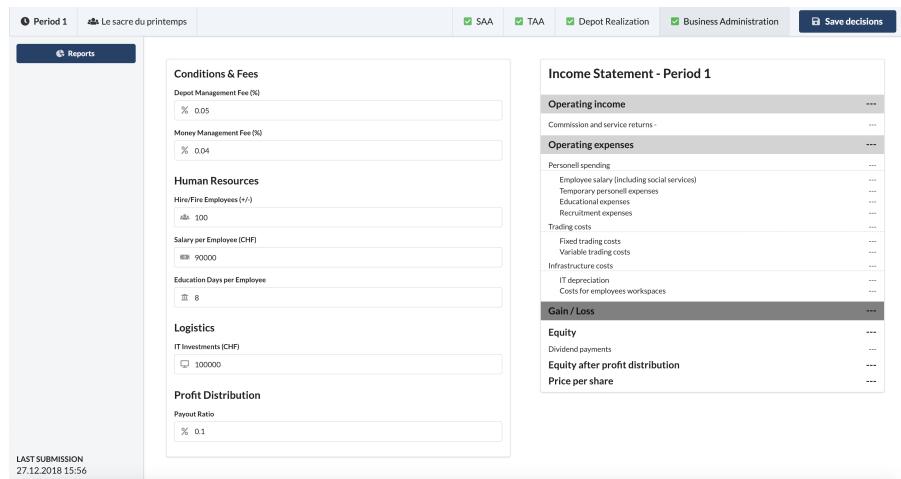
6.4.1. TAA



6.4.2. Depot Realization



6.4.3. Business Administration



7. Future Development

B. User Stories

A. Exemplary scenario

Followoing scenario should generalize an exemplary playing of the portflio management game:

B. User Stories

General

ID: GE01	Date: 17.07.2018
Name: One login per team	
Story: As a game master, I want to be able to create one single login per participating team such that the participants are supported in their group work.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ Game masters can create team logins by creating a game ✓ Teams can login with the credentials they received from the game master 	
Priority: Must have	

ID: GE02	Date: 13.08.2018
Name: Maintaining multiple logins with a single account	
Story: As a team of students, we would like to be able to sign in on multiple devices such that we can perform research and preparations independently.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ Multiple login sessions can be maintained with a single team account ✓ Teams need to be appropriately informed about the possibility of inconsistencies due to multiple actions taken from different devices 	
Priority: Must have	

ID: GE03	Date: 13.08.2018
Name: Game master account creation	
Story: As the responsible person for the seminar I need to create different game master accounts such that multiple persons could overtake the lead of the game.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ A game master account can create new game master accounts ✓ Multiple game master accounts may be created 	
Priority: Must have	

ID: GE04	Date: 16.10.2018
Name: Provisional hand-in of allocations	
Story: As a team of students, we would like to be able to save our current state	

provisionally, such that other members of the team can also see the current state on their device.

Acceptance Criteria:

- SAA, TAA, and Allocations can be imperatively saved to the database without needing to end the period
- After saving the state, other members of the team with the same active login can reload their application and see the new state

Priority: Must have

Game Sessions

ID: SE01	Date: 13.08.2018
Name: Session creation	
Story: As a game master, I want to be able to create game sessions (multiple games) such that I can set up an execution of the game in advance.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ Game masters can initialize new game sessions ✓ Teams can be created based on number of teams and assigned to any initialized game session 	
Priority: Must have	

ID: SE02	Date: 13.08.2018
Name: Customer profiles	
Story: As a game master, I would like to define and parametrize different customer profiles that students have to work with.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ The game master can define any number of customer profiles that students will need to account for ✓ There are existing some predefined customer types ✓ Each customer profile can be parameterized with regards to their acceptance ranges (upper and lower limits per customer profile) ✓ Customer profiles can be enabled only after a certain number of rounds such that it is possible to start games with only one single type of customer (may be parametrized in advance) 	
Priority: Must have	

ID: SE03	Date: 13.08.2018
Name: Game execution	
Story: As a game master, I need to be able to explicitly start and continue sessions such that access is controlled and only available during the execution of the game.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ Initialized games can be started by the game master that created them (and only by them) 	
Priority: Must have	

ID: SE04	Date: 13.08.2018
Name: Session parametrization	
Story: As a game master, I want to be able to parametrize games such that I can introduce reasonable variance between different games and showcase different economic environments.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Sessions can be parameterized with respect to the execution of the game <input type="checkbox"/> Sessions can be parameterized with respect to the simulation of stock market data (e.g., length and number of periods to simulate) <input type="checkbox"/> Sessions can be parameterized with respect to the internal market model (i.e., its effective curves and indices) <input type="checkbox"/> Sessions can be set to alternatively use periods of historical data instead of using the stock market simulation 	
Priority: Must have	

ID: SE05	Date: 13.08.2018
Name: Pausing and continuing sessions	
Story: As a game master, I would like to be able to pause and continue sessions in-between rounds, such that I can account for any unexpected events in a fair manner.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ Running sessions can be paused by the game master after a round is completed if all teams have submitted their decisions such that the students have some time pressure in the game ✓ Paused sessions can be continued by the game master ✓ After continuing a paused session, the next round can be started immediately 	
Priority: Must have	

ID: SE06	Date: 07.11.2018
Name: Parametrized Sessions - Scenarios	
Story: As a game master, I would like to choose from different predefined templates that represent different critical points in financial history	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Choose from multiple scenario templates within creation of the game 	
Priority: Nice to have	

ID: SE07	Date: 07.11.2018
Name: Add new customers	
Story: As a game master, I would like to have the possibility to add new customers for each Team after a period. This should be voluntary for each period.	
Acceptance Criteria: <ul style="list-style-type: none">✓ Game master can add a different number of new customers for each team❑ Game master can add a total summation of customers for every team	
Priority: Should have	

Asset Allocation

ID: AP01	Date: 13.08.2018
Name: Defining a Strategic Asset Allocation (SAA)	
Story: As a team of participants, we need to be able to define an initial strategic asset allocation for the game based on the different types of customers that are available to us.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> An SAA can be defined before any of the game rounds are played (period 0) <input type="checkbox"/> Once defined, the SAA provides a fixed point of reference for further rounds <input type="checkbox"/> The SAA can be extended to new customer profiles if any are added later on 	
Priority: Must have	

ID: AP02	Date: 13.08.2018
Name: Defining a Tactical Asset Allocation (TAA)	
Story: As a team of participants, we need to be able to define our tactical asset allocation at the beginning of each round, so that we can adjust our long-term strategic plans.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> A new TAA can be specified for each round of the game and if the SAA is defined within boundaries for all categories <input type="checkbox"/> While deciding on a TAA, the team is kept informed about their SAA and any ranges or game constraints they might not fulfill with their current allocation (e.g. max. 10% deviation from SAA) <input type="checkbox"/> Deviation for TAA from SAA may be defined for each game with default of 10% 	
Priority: Must have	

ID: AP03	Date: 13.08.2018
Name: Portfolio realization	
Story: As a team of participants, we need to be able to allocate our funds to specific assets and markets, as we want to achieve the portfolio state we defined in our SAA and TAA.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Teams are able to distribute their funds on different asset categories based on their TAA decisions <input type="checkbox"/> Teams can choose from different markets and currencies <input type="checkbox"/> When investing in equity, teams can choose from different sectors of markets <input type="checkbox"/> Teams are being appropriately informed about any constraints and ranges that 	

<p>need to be followed, as well as their self-defined SAA and TAA constraints</p> <p><input type="checkbox"/> Maximum deviation of a share should be defined when creating the game by the game master (e.g. max. 10% deviation per share in next round)</p>
<p>Priority: Must have</p>

ID: AP04	Date: 13.08.2018
Name: Hedging foreign currencies	
Story: As a team of participants, we would like to be able to hedge our investments into foreign currencies such that we are not exposed to currency risks.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Investments in other currencies can be optionally hedged when realizing a depot <input type="checkbox"/> Hedging incurs a reasonable cost 	
Priority: Should have	

ID: AP05	Date: 07.11.2018
Name: Define two phases for the game	
Story: As UI designer of the game we would like to define two phases of the game, whereas the first phase defines the initial SAA. In the second phase the teams can decide on their TAA, their depot realization and other business administration decisions.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Phase 1 enables the opportunity to define the initial SAA for each customer type <input type="checkbox"/> In phase 2 the teams can decide on TAA, depot realization or other business administrative decisions 	
Priority: Must have	

Business Administration

ID: BP01	Date: 13.08.2018
Name: Forecasting	
Story: As a team of participants, we would like to be able to generate forecasting reports based on our own estimates, such that we can evaluate our planned decisions without using additional tools (i.e., Excel).	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Teams can provide estimates for future parameters (e.g., customer counts) <input type="checkbox"/> Based on their estimates and their input numbers, teams can generate a forecasting report that will show them some metrics about their decisions 	
Priority: Should have	

ID: BP02	Date: 13.08.2018
Name: Account balance	
Story: As a team of participants, we need to be able to see the balance of our accounts (i.e., assets under management), such that we can decide on how much money to spend in different expense categories.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> The necessary account balances are transparently visible to teams <input type="checkbox"/> Expected investments for the current period are simulated in the account balance 	
Priority: Must have	

ID: BP03	Date: 13.08.2018
Name: Defining fees and conditions	
Story: As a team of participants, we need to be able to define the fees and conditions we offer to our customers, such that we can optimize our profits.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Fees and conditions can be defined for each customer type <input type="checkbox"/> All-in pricing model can be chosen with a provided percentage 	
Priority: Must have	

ID: BP04	Date: 13.08.2018
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Name: Marketing, HR, and Logistics
Story: As developers of the simulation, we need to ensure that teams can distribute their money to different expense categories, such that we can appropriately simulate business-related expenses (like marketing, HR, and logistic).
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> Teams can define their spend on marketing-related categories: <ul style="list-style-type: none"> - Marketing expenses for all different customer types <input type="checkbox"/> Teams can define their spend on HR-related categories: <ul style="list-style-type: none"> - Employments and suspensions of personal - Salary of employees (for each employee) - Bonus - Education days for an employees per year <input type="checkbox"/> Teams can define their spend on logistics-related categories: <ul style="list-style-type: none"> - Investments in IT
Priority: Must have

ID: BP05	Date: 13.08.2018
Name: Fluctuation	
Story: As a developer, we need to ensure that teams must account for fluctuation in their HR expenses, as we want to model a realistic business environment.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> The market model includes fluctuation coefficients <input type="checkbox"/> Fluctuation is based on several factors: <ul style="list-style-type: none"> - Satisfaction of the employees - Workload of the employees - Salary / Bonus 	
Priority: Must have	

Evaluation / Simulation

ID: EV01	Date: 13.08.2018
Name: Team performance metrics	
Story: As a game master, I need to be able assess the performance of teams on several levels, including separate metrics and aggregate measures.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> After a completed round of play, different metrics are calculated for each team <input type="checkbox"/> Some metrics build on a predefined effective curve and result in an “index” <input type="checkbox"/> Other metrics assess the performance of teams with regards to their portfolios <input type="checkbox"/> An overall measure aggregates the different metrics and allows a ranking of teams 	
Priority: Must have	

ID: EV02	Date: 13.08.2018
Name: Customer satisfaction index	
Story: As developers of the game, we want to build a customer satisfaction index that, based on several key input numbers, calculates the satisfaction of all different customer types for each team.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> The customer satisfaction index is specific to each type of customer <input type="checkbox"/> The customer satisfaction index is calculated based on multiple factors: <ul style="list-style-type: none"> - Performance of the portfolios of the respective customer type - Track record - Risk-adjusted Performance (Sharpe-Ratio, Information-Ratio, ...) - Management fees - Availability of bank employees for consulting (HR) - Matching SAA to customer profile - Matching actual allocation to SAA 	
Priority: Must have	

Reporting

ID: RE01	Date: 13.08.2018
Name: Reports for presentation	
Story: As a game master, I want to be able to present an automatically generated comparison (graphs and reports) of individual team performances, such that I can explain some of the typical mistakes and decisions that could have been made throughout the seminar or the lecture.	
Acceptance Criteria: <ul style="list-style-type: none"> <input type="checkbox"/> After completion of any round, game masters can display a comparison report <input type="checkbox"/> The comparison report includes sensible means of visualization: <ul style="list-style-type: none"> - Graphs with ranking of all teams regarding different measures <ul style="list-style-type: none"> - Netto-performance per customer type - Netto-performance cumulative per customer type over all periods - Tracking error per customer type - Customer satisfaction index per customer type - Customer count per customer type - Assets under management - Net-new money - Total earnings - Total expenses - Gain / Loss - Cost / Income ratio - All in conditions - Depotgebührensatz - Marketing-expenses - Infrastructure (IT-index) - Education-index - Human Resources - current count of employees - Temporary employees - Customer advisory services - Employee Satisfaction - Service quality index - Total index - Total index cumulative - Benchmark using ideal SAA predefined by game master 	
Priority: Must have	

ID: RE02	Date: 13.08.2018
Name: After-period reports for individual teams	
Story: As a team of participants, we want to be able to access our past benchmarks and	

performance reports, such that we can decide about future actions in an informed way.

Acceptance Criteria:

- Teams can display their past reports at any time during the game
- No information is leaked about any of the other teams or the future of the game

Priority: Must have

ID: RE03

Date: 13.08.2018

Name: Economic outlook

Story: As a game master, I want to provide the participating teams with an automatically generated economic outlook (including forecasts) that I can customize with some sensible parameters, such that the students can take more informed decisions for the next period.

Acceptance Criteria:

- The system generates an economic outlook according to a predefined template
- Key numbers are taken from the parameters that have been defined for the simulation of the next period as well as from some randomization parameter
- The numbers in the economic outlook can be overridden manually before providing it to the participants

Priority: Must have

ID: RE04

Date: 13.08.2018

Name: View of the CIO

Story: As a game master, I would like to have the opportunity to provide a custom assessment and directions in my own wording that is provided to the students as the view of their bank's CIO (based on the economic outlook).

Acceptance Criteria:

- Game masters can provide custom plain text that is shown to the students under the premise of being from their own CIO
- The CIO assessment can include directions and guidelines as well as interpretations of the economic outlook

Priority: Should have

ID: RE05

Date: 13.08.2018

Name: Visualization of historical stock prices

Story: As a team of participants, we would like to get a historical overview of the stocks in our portfolio, such that we can make reasonable decisions about future investments.

Acceptance Criteria:

- Teams can access reports regarding the historical development of their stocks
- Teams can view all stocks, not just those they've chosen for their portfolio

Priority: Should have

ID: RE06

Date: 13.07.2018

Name: Performance attribution

Story: As a team of participants, we need to have a comprehensive report about the performance attribution of our assets, such that we can decide about further investments.

Acceptance Criteria:

- After each period, teams can access reports with their full performance attribution over past periods

Priority: Must have

Development

ID: DE01	Date: 12.07.2018
Name: Infrastructure	
Story: As a developer, I need to build my application on an extendable and scalable infrastructure, such that it will be easily maintainable in the future.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ The infrastructure is easily extendable by additional services (Docker) ✓ Multiple services can be included into the system 	
Priority: Must have	

ID: DE02	Date: 13.08.2018
Name: Continuous integration and deployment	
Story: As a developer, I want to have an environment that is continuously integrated and deployed, such that I can always rely on having current feedback and fast failures.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ On merges into the master branch, the application is continuously deployed to a staging environment, where it can be tested <input type="checkbox"/> On tagging of releases, the application is deployed to the production environment ✓ The CI pipeline includes a full test suite for the API of the application 	
Priority: Must have	

ID: DE03	Date: 13.08.2018
Name: Code versioning and maintenance	
Story: As a developer, I need to have access to reliable repositories for the application code, such that I can easily collaborate with others on the project and new developers could understand the code.	
Acceptance Criteria: <ul style="list-style-type: none"> ✓ The application services are stored in separate, modular repositories ✓ The repositories are managed by submitting merge requests that contain at least a short (but complete) description of the changes ✓ The application backend contains a full integration test suite as well as independent unit tests for each service <input type="checkbox"/> New developers understand the architecture of modular repositories by creating understandable readme files 	

Priority: Must have

ID: DE04

Date: 13.08.2018

Name: Local game execution

Story: As a game master, I need to be able to easily run the application on my local device, such that it can still be used even in case of network and/or other failures.

Acceptance Criteria:

- Application can be started on any local device with sufficient performance
- Backup datasets can be previously downloaded such that it is not necessary to load the entire stock market database onto the local device
- The application can be started by using simple scripts without extensive IT affinity

Priority: Should have