Beat the market

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# Goal

* Beatthemarket provides the following functions: Bookkeeping stock holdings, Analyzing P&L, and Recommending optimized portfolio allocation.
* This application enables users to manage their stock holdings. By adding their records, users can view their P&L. Investment recommendation which uses a machine-learning algorithm provides predictive insights to enable and support smart investment decisions. The following functions are available for usage:
  + Bookkeeping stock holdings
  + Monitor P&L
  + Real-time P&L, returns, holdings, trades, and portfolio statistics
  + ~~Portfolio Comparison to the index market (Benchmark Index)~~
  + Portfolio allocation recommendation
  + ~~Price prediction~~
  + Market news

# Target & Demographics

* Anybody who trades in stock market

# Data Source

* iexcloud.io - <https://iexcloud.io/docs/api/>
* yahoo finance - <https://finance.yahoo.com/>

# Approach

## Data Schema

A screenshot of a cell phone

Description automatically generated

## Issues with API

* iexcloud has limited usage for free tiers
* yahoo finance scraping has risk of getting banned

## Data Security

* The application is secured by flask-login method which provides auth service.

## Functionality

* User Signup/Login
  + Change user email
  + Set up username
  + Change user password
* Bookkeeping Portfolio
* View P&L
  + Portfolio analysis
  + Portfolio recommendation
* Market News

## Stretch Goal

* Market Prediction Integration
* Connect brokers’ accounts