



D I R

My Daily Investment Report

A tool to follow investments precisely and easily

Daily Investment Report

Executive summary

- Follow a stock portfolio can be hard
 - It depend of the quality if one's bank or broker interface
 - External solutions exists but they may not reach everyone's need
- What would be a good investment reporting
 - Easy : quick set up, less manual action as possible
 - Clear : everything available at a glance
 - Detailed : all statistics and information to follow or review investment decisions
- Solution : Daily newsletter reporting
 - Done with python (simple, reliable)
 - Structured data with SQL
 - Simple but effective code so anyone can add indicators
 - Nice format with an html template which can be changed according to one's taste

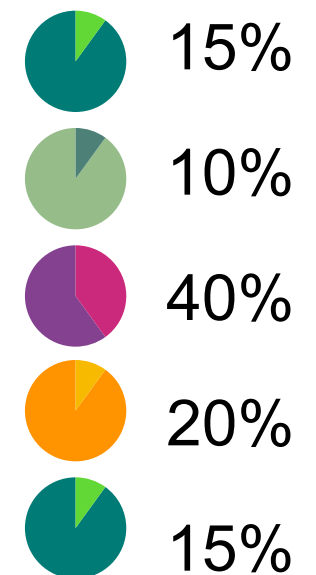
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Why start this project ?

To follow my stock portfolio :

- ◉ Waste time to access data
- ◉ The online interface is poorly designed
- ◉ There is zero historical follow up
- ◉ No statistics/indicators to evaluate if the portfolio should be rebalanced
- ◉ Others web solution don't seems to add value

% Explanation



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What do I need ?

Specifications

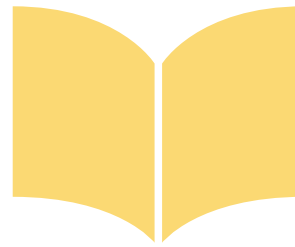
1. Easy



Set up in no time

Minimum action needed

2. Clear



All the data exposed
clearly

3. Insightful



Historical follow up
Interesting statistics
news

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Solution



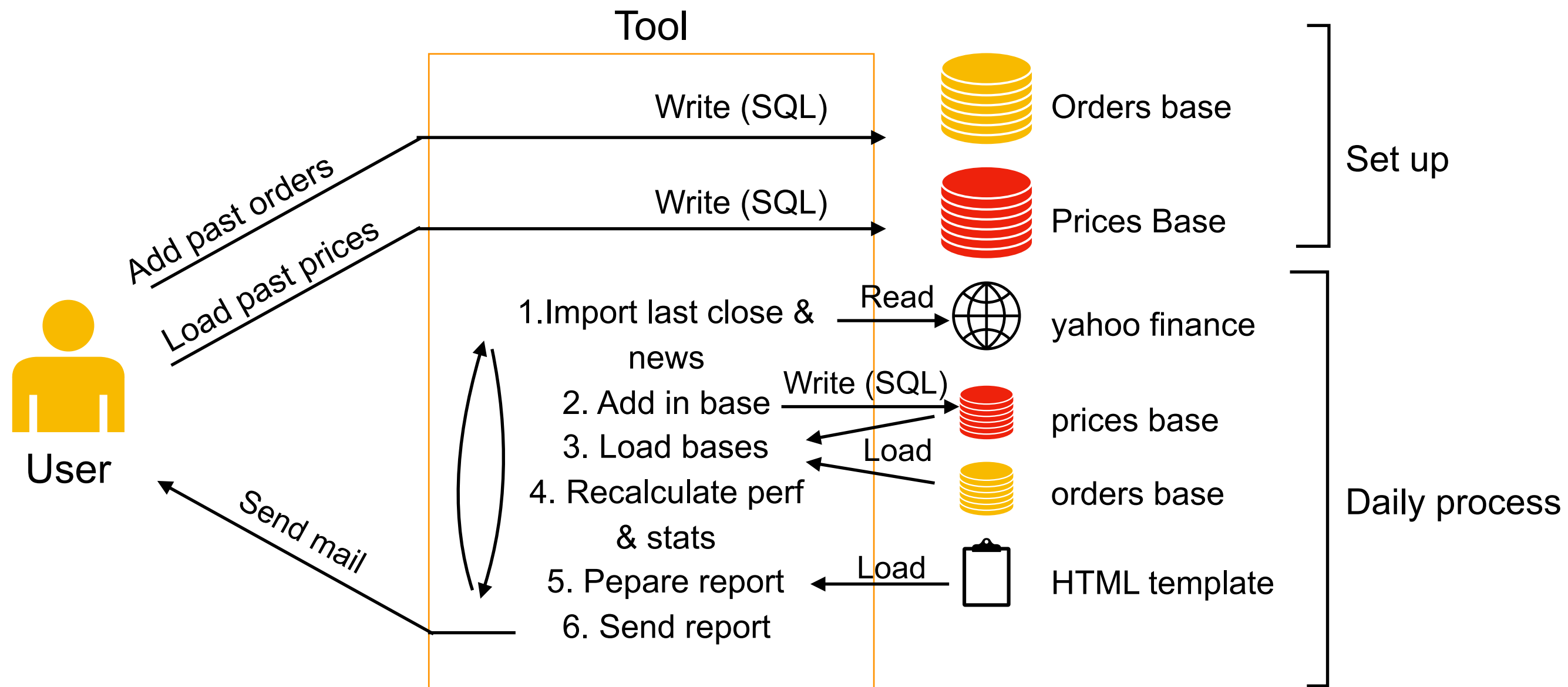
Daily newsletter with :

- Performance of the portfolio with historic data
- Statistics of the portfolio : volatility/range/...
- Performance & statistics of the stocks
- Latest news on the stocks which compose the portfolio

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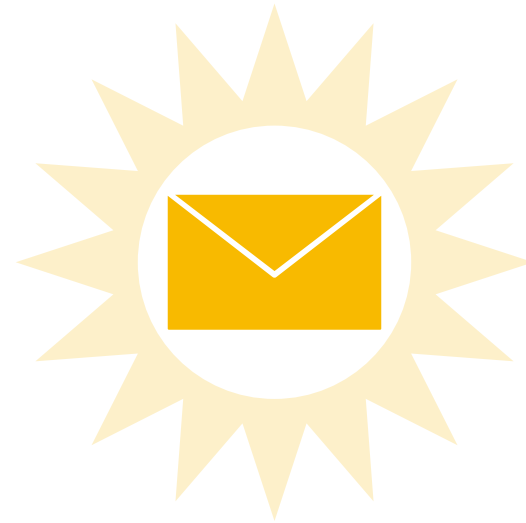
Implementation

To have an historic follow up of the portfolio the used start by setting up



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Implementation



[See an example of the reporting by clicking here.](#)