



INVESTMATE

AGENDA

- TEAM MEMBERS
- PROJECT OVERVIEW
- PERSONAS
- TECH STACK
- SPRINT SCHEDULE
- TEAM AGREEMENT
- RETROSPECTIVE
- WIKI LINK

team members



Mani Chandana Kilaru
developer



venkatesh nidumukkala
Scrum master tester



charan raju m
developer

team members



Tejaswi koppula
developer



Ankit Mhatre
machine learning engineer



Uma Maheshwari
bichinepally
developer

TEAM MEMBERS

- 1.Venkatesh Nidumukkala – scrum master
- 2.Ankit mhatre - Machine learning engineer
- 3.Uma Maheshwari Bichinepally - Developer
- 4.Tejaswi Koppula - Developer
- 5.Charan Raju M - Developer
- 6.kilaru Mani Chandana - Developer

Changes and improvements done

- Adding Images
- Removing Market Analysis
- Adding Algorithms
- Detailed Explanation on Technologies

PROBLEM STATEMENT

- In a modern world of finance, numerous young people aged from 18 to 25 years old are confused looking at the situation when, on one hand, they aspire to get involved in this global trend but, on the other hand, they experience numerous difficulties trying to search for a source of practical experience and knowledge. Even as you understand the principles from the course rooms academically, you struggle to apply them in the real life scenarios. This results in proficiency gap between your educational knowledge and investment strategies. This gap is a result of overwhelming complications in the structure as well as the FEAR of monetary loss, which is a key factor education platform which should be easy to understand and also a learner-based approach should be discovered.

PROJECT DESCRIPTION



Project Name:	Investmate
Team:	Pace Super Kings
Project Description:	<p>For young individuals aged 18 to 25 navigating the complexities of modern finance, the proficiency gap between academic learning and practical investment strategies poses a significant challenge.</p> <p>This gap, stemming from the intricate nature of financial systems and the fear of monetary loss, highlights the need for an educational platform.</p> <p>The solution is an accessible, learner-focused application that demystifies financial concepts and bridges the theoretical-practical divide.</p> <p>Unlike traditional educational resources that may not fully address real-world application.</p> <p>this platform aims to empower young investors with the confidence and knowledge to engage effectively in the global financial landscape.</p> <p>our application helps everyone to have perfect investment strategies.</p>
Benefit Outcomes:	<p>There are numerous advantages and results from putting in place an educational platform designed to help young people understand the complexity of finance:</p> <ol style="list-style-type: none">1. Enhanced Financial Literacy: The platform would help users become more knowledgeable about financial terms, concepts, and tactics, enabling them to make well-informed choices about saves, investments, and financial planning.2. Increased Confidence: The platform would increase users' confidence in navigating financial markets and successfully managing their own finances by offering real-world examples and practical knowledge.3. Decreased Risk Aversion: Users may grow more tolerant of risk and feel more at ease investigating investing options as they learn more about financial concepts and obtain real-world experience through case studies or simulated trading.4. Improved Ability to Make Decisions: Users can improve their skills with individualized feedback and interactive learning courses.
Github Link:	https://github.com/htmw/2024S-pace-super-kings

PERSONAS - 1



- **Name:** Priya
- **Age:** 23
- **Occupation:** College student in the final year, aspiring to start her own business.
- **Investment Experience:** Minimal experience.
- **Goals:** To acquire investment management skills for better financial management.
- **Challenges:** Unable to balance academic responsibilities, entrepreneurial planning and investment learning.

PERSONAS-2



- **Name:** Sara
- **Age:** 20
- **Occupation:** College student majoring in English Literature.
- **Investment Experience:** None.
- **Goals:** Interested in learning about personal finance and investing to start saving for the better future
- **Challenges:** Unable to understand the financial terms

PERSONAS-3

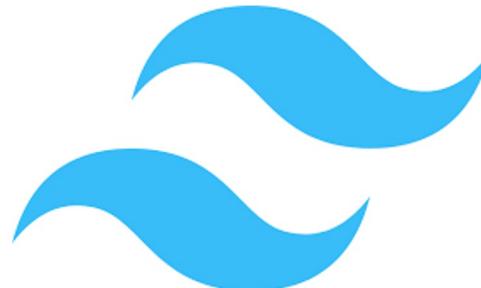


- **Name:** Michael
- **Age:** 25
- **Occupation:** College student majoring in finance.
- **Investment Experience:** No practical experience.
- **Goals:** To gain hands-on experience in the stock market using his classroom knowledge.
- **Challenges:** Finds it difficult to apply his theoretical knowledge in real-world

MVP (Minimum Viable Product)

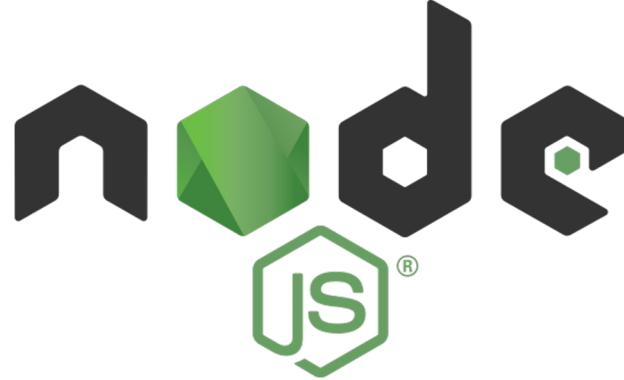
- User Authentication
- ML-driven Trading Simulations
- Adaptive Risk Management Tools
- Personalized Learning Paths

Technologies - Frontend



React Js is used for building frontend application and tailwindcss is used for styling.

Technologies - Backend



Node.js is used for backend services and even MongoDB is used as an NoSQL database and to store the data.

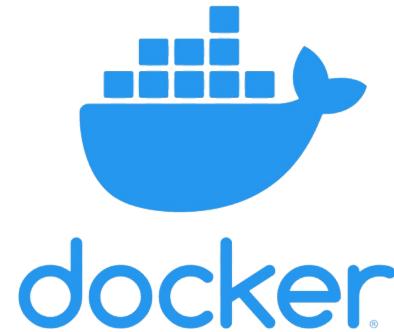


Technologies - Machine Learning



Sciket Learn is used for Machine learning and to do predictions.

Technologies - Cloud

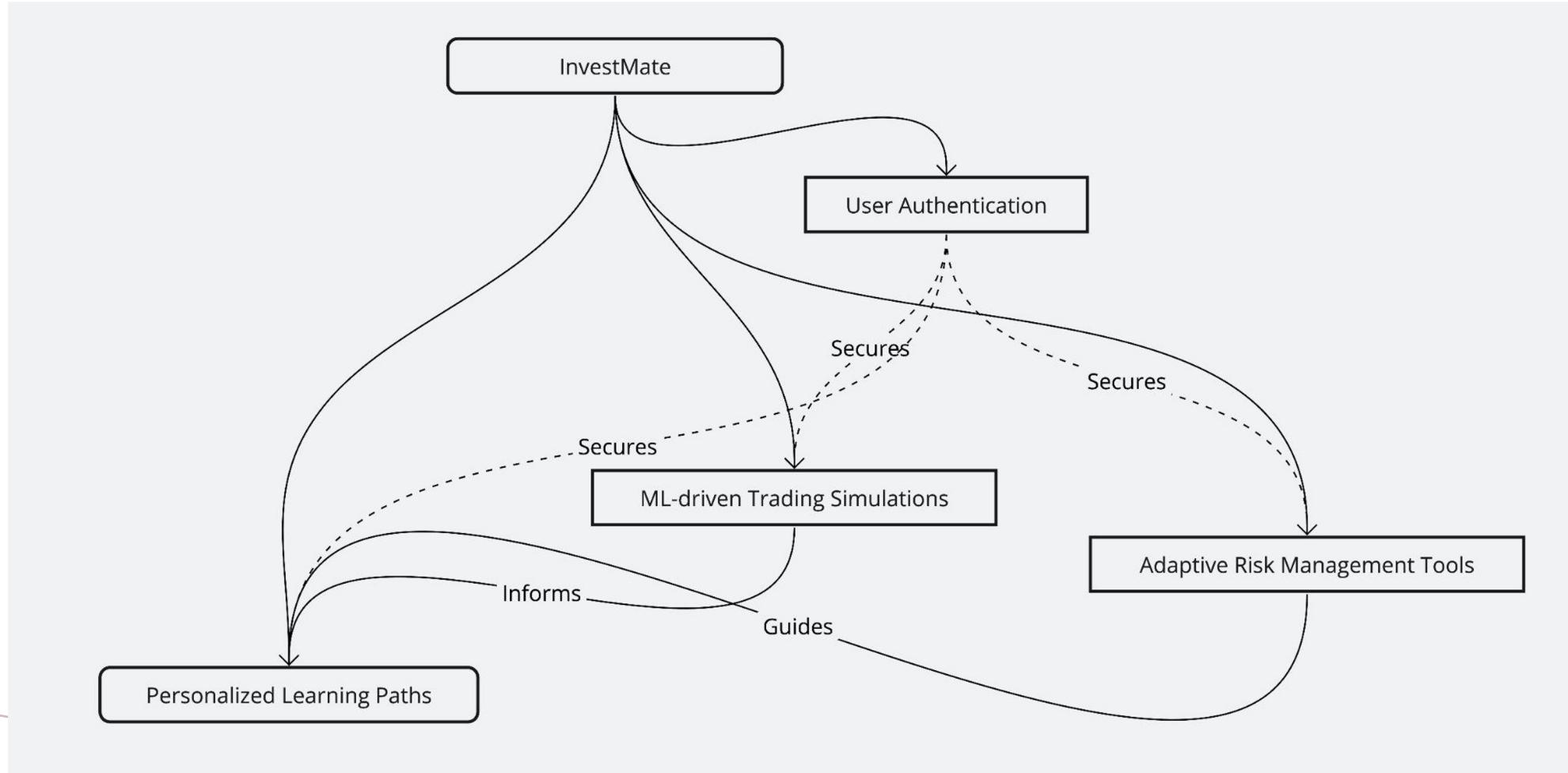


AWS is used for deploying the application and docker is used for containisation and scalability.

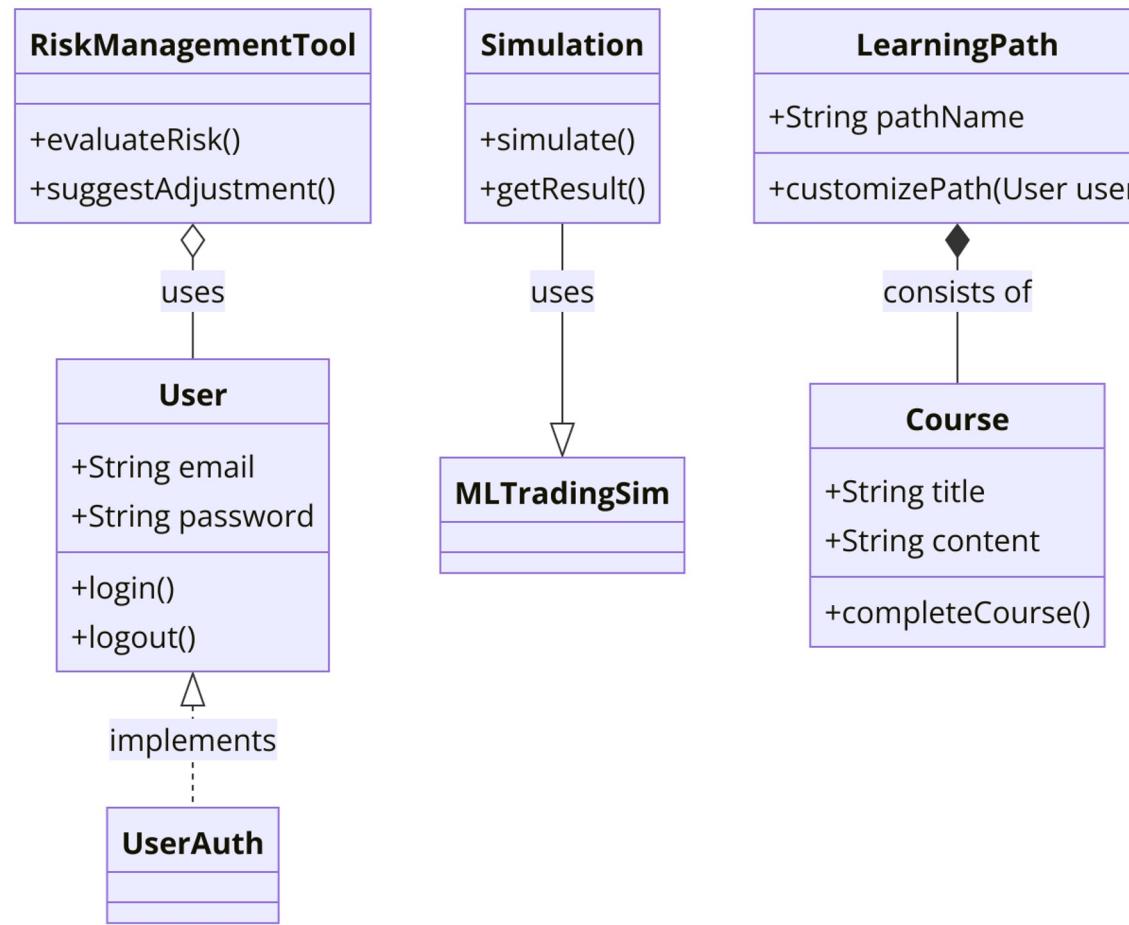
Machine Learning Algorithm

- Random Forests predict trends in ML-driven trading simulations.
- Logistic regression classifies risks in adaptive management tools.
- K-means clustering tailors content in personalized learning paths.

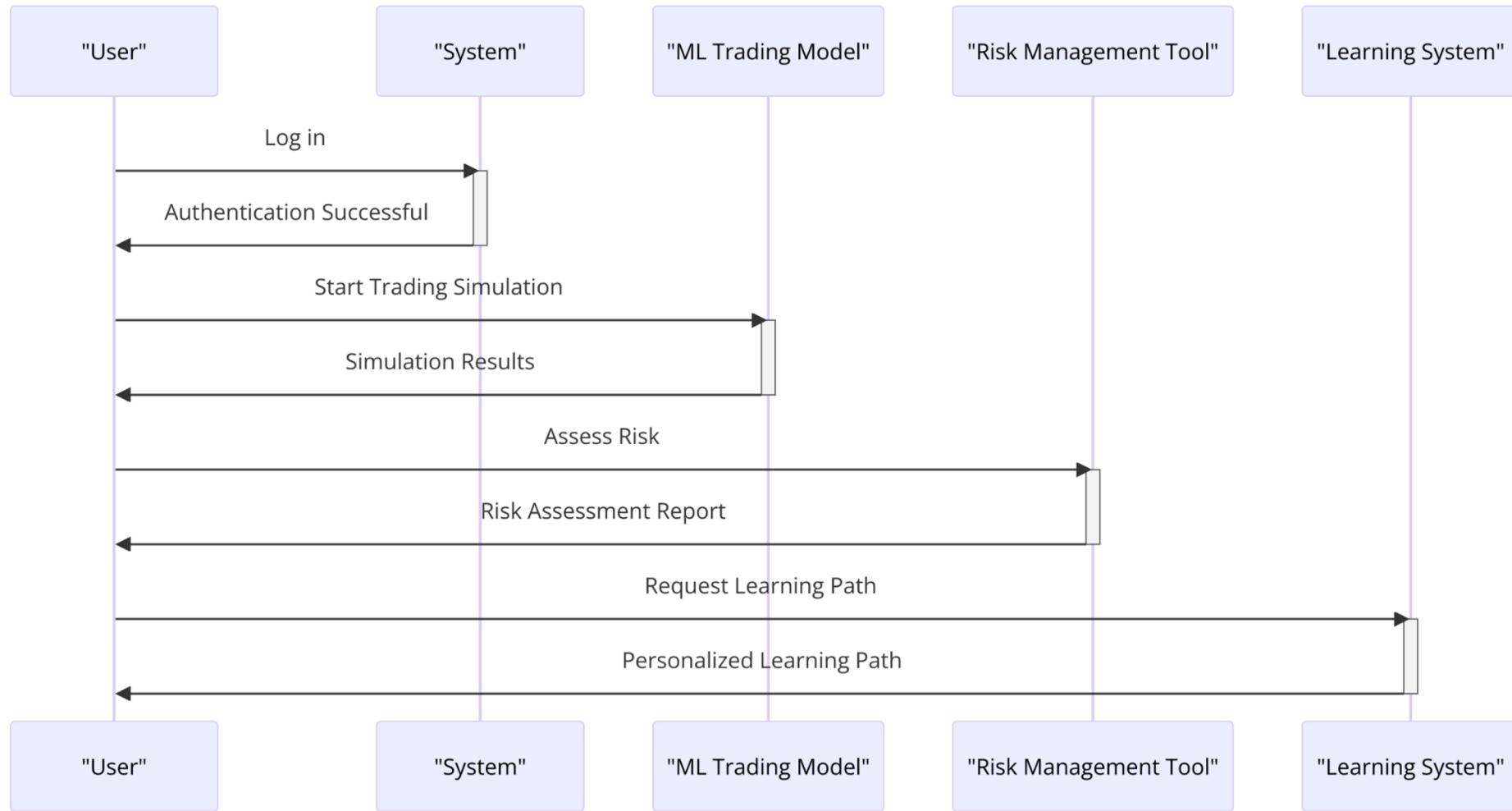
Conceptual Diagram



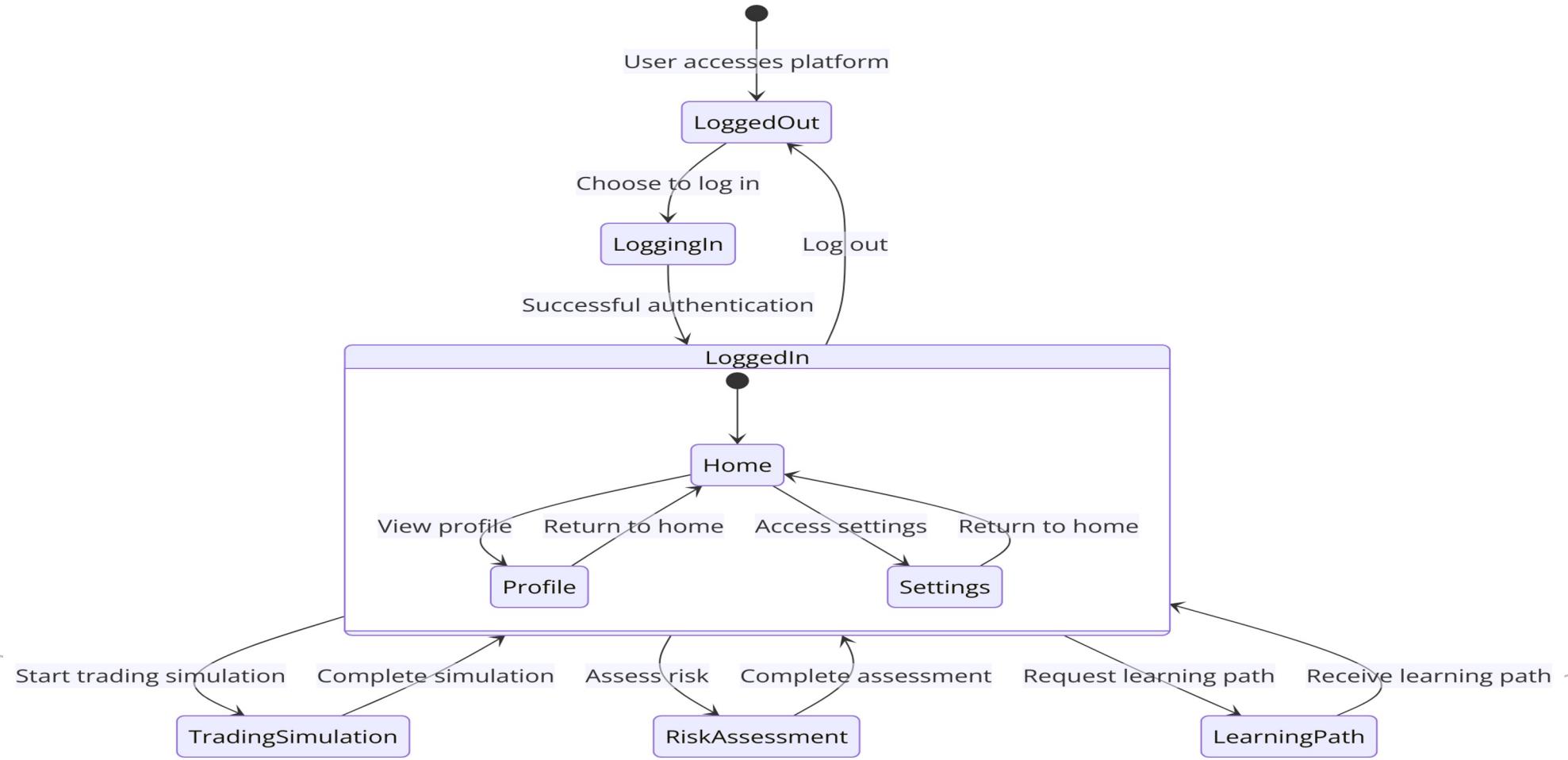
Class Diagram



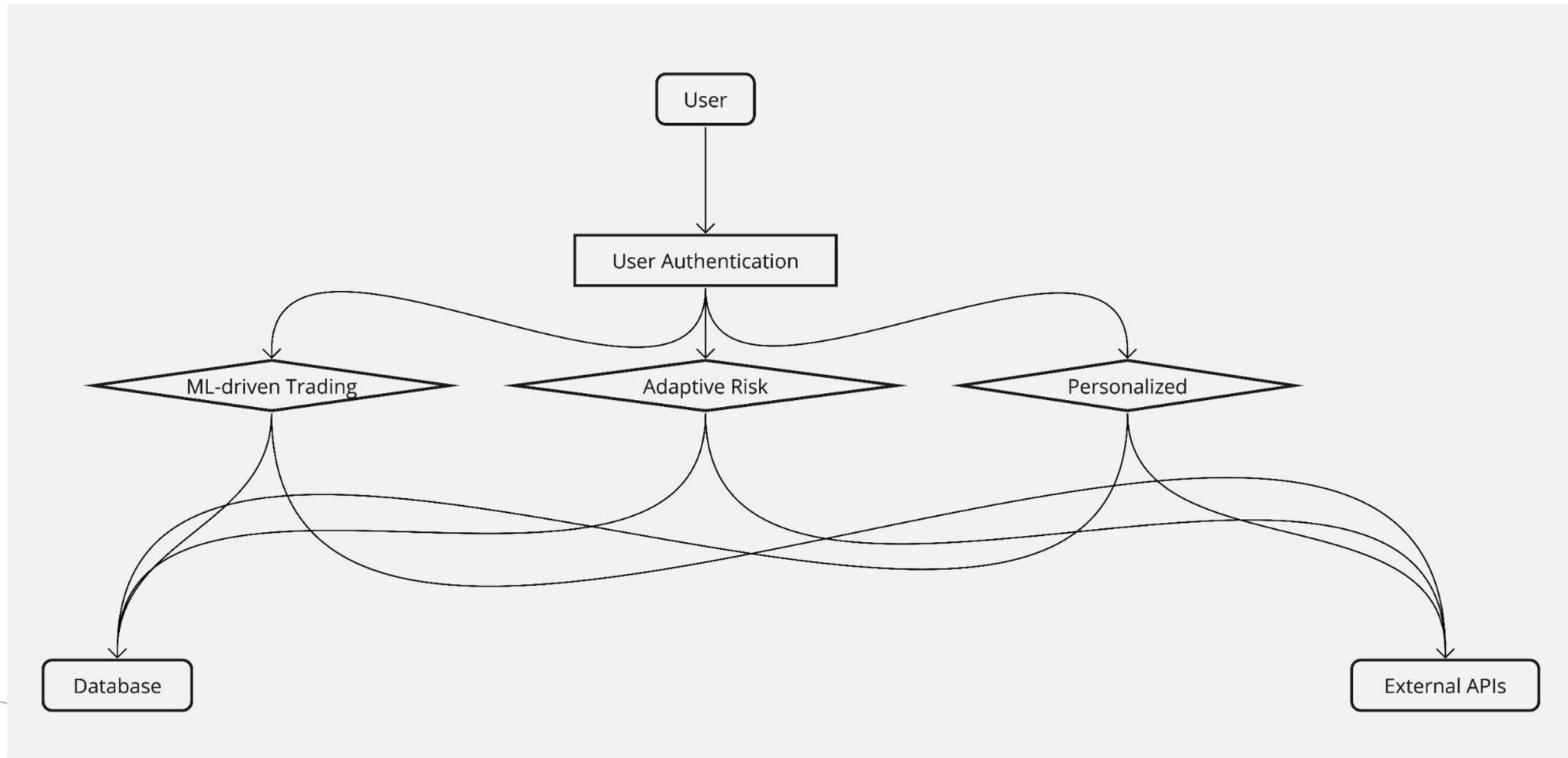
Sequence Diagram



State Diagram



Context Diagram



USER STORIES/Acceptance Criteria

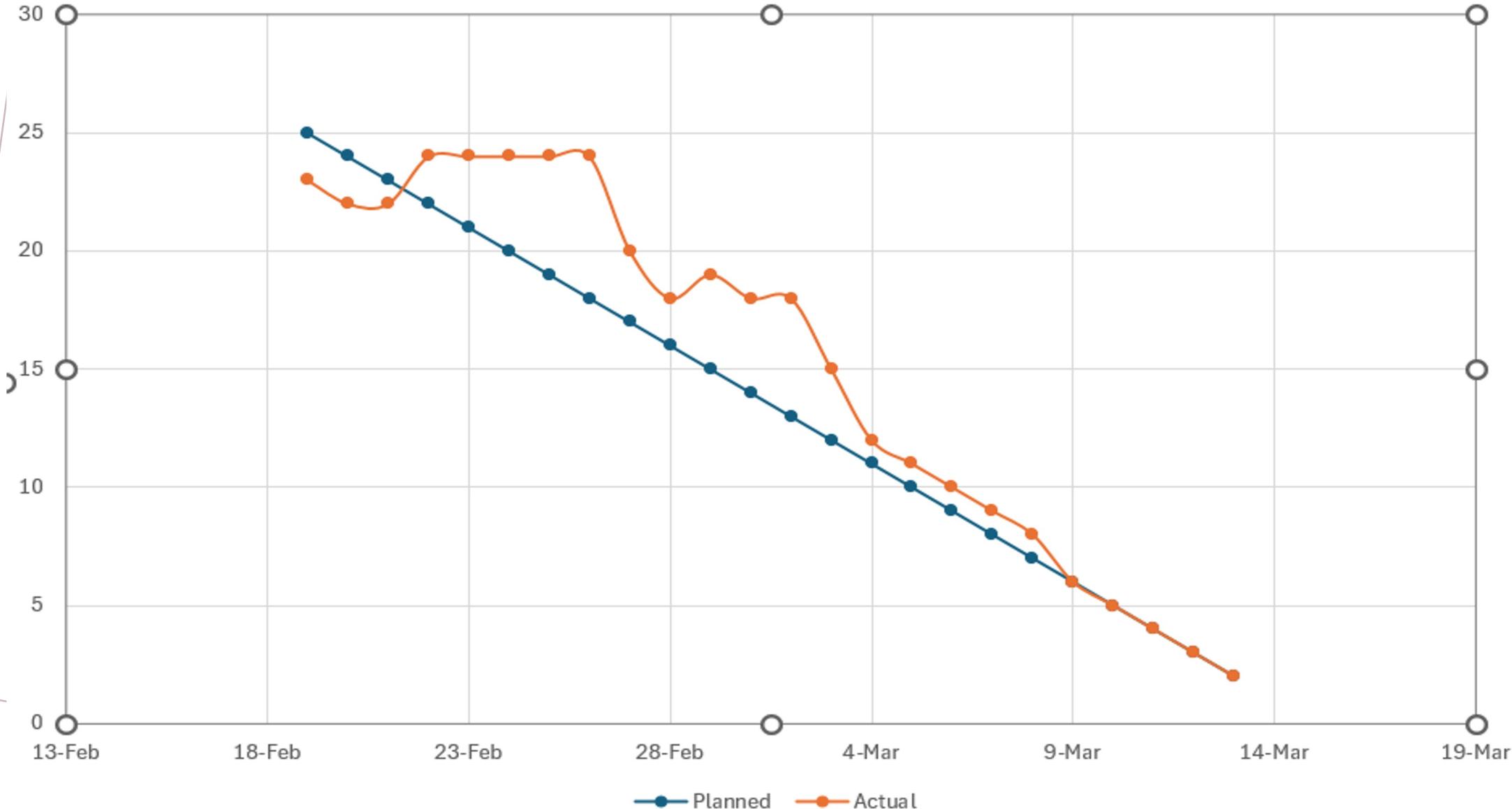
Story ID	Role	Goal	Reason	Acceptance Criteria
1	New user	Sign up and log in functionality	Access platform features	Sign up with email- Log in with email and password- password reset option
2	User	Access to trading simulations	Learn trading risk-free	G Selection of trading simulations- Feedback on trading decisions
3	User	Risk management tools	Understand and manage trading risks	Visibility of strategy risks Suggestions for risk mitigation
4	User	Personalized learning paths	Enhance trading knowledge	Topic selection based on interest. Structured list of lessons and resources
5	User	Real-time market data in simulations	Realistic trading experience	Display of live market prices. Access to historical market data
6	User	Secure data handling	Confidence in platform use	Secure storage of personal information. Privacy settings management

Sprint Backlog

A	B	C	D	E
Backlog Item ID	Feature	Description	Priority	Status
1	Basic System Setup	Initialize project architecture and frameworks.	High	Done
2	User Authentication System	Develop registration, login, and password reset functionalities.	High	Done
3	Database Integration	Set up initial database for user and simulation data.	High	Done
4	API Framework Setup	Establish framework for external market data APIs.	Medium	Done
5	Basic Trading Simulation Engine	Start development of a simple trading simulation engine.	Medium	Done
6	Risk Management Tool Prototype	Create a basic version of the risk management tool.	Medium	Done
7	Learning Path Framework	Outline structure for personalized learning paths and basic UI.	Low	Done

Burndown chart

Burndown Chart



team velocity

25 story points

TEAM AGREEMENT

TEAM AGREEMENMT

- Everyone should respect each other's opinion and can correct if they have any mistake, we take a poll in the team meeting on the workflow and the majority will be the final decision.
- Inappropriate behavior is prohibited and will be informed to professor and necessary action could be taken.
- Everyone should have equal contribution in the project and should help each other in completing it.
- Everyone should contribute their time in completing the project on every Wednesday and Sunday by attending the meetings.
- Missing of team meetings is not encouraged and the time of the meetings for the specified days will be intimated a day prior.
- All work specified should be completed in time and if you need any support, can reach out other team members for help but no extra time is given.
- All communication is done via slack and all team members should actively participate in it.

Teammates signatures

1. Venkatesh Nidumukkala
2. Ankit Mhatre
3. Uma
4. Tejaswi Koppula
5. Charan Raju M
6. Kilaru Mani Chandana

RETROSPECTIVE

IdeaBoardz start typing to filter stickies Export

View Section All Sections Sort

Pace Super Kings

What went well +		What can be improved +		Action Items +	
Easier to manage work in the past week + 0	Setting clear project objectives + 0	Frequent Git commits + 2	Understand meeting agenda and be mindful about the meeting duration + 0	Take frequent meetings + 3	Setting a feedback loop, for iterating faster. + 0
Managing workload in short span of time + 0	Better delegation after unforeseen circumstances in a team + 1	Team Communication could further be improved + 0	Team collaboration can be improved + 0	Focusing a little bit on Team emotional intelligence for understanding, to make it easier to communicate and understand the reaction. + 0	Have a backup plan ready for any uninvited problems + 2
Acknowledged development efforts. + 0	Improved communication than the previous sprint. + 2	We can improve the way we do presentations + 2	We can further improve our time management with respect to team work + 0	Be more mindful about the deadlines + 5	
Started to acknowledge each others creative inputs + 1		Document team meetings + 4			

Sprint 3 updates

- Connect the API with frontend
- Make proper connections between backend and frontend.

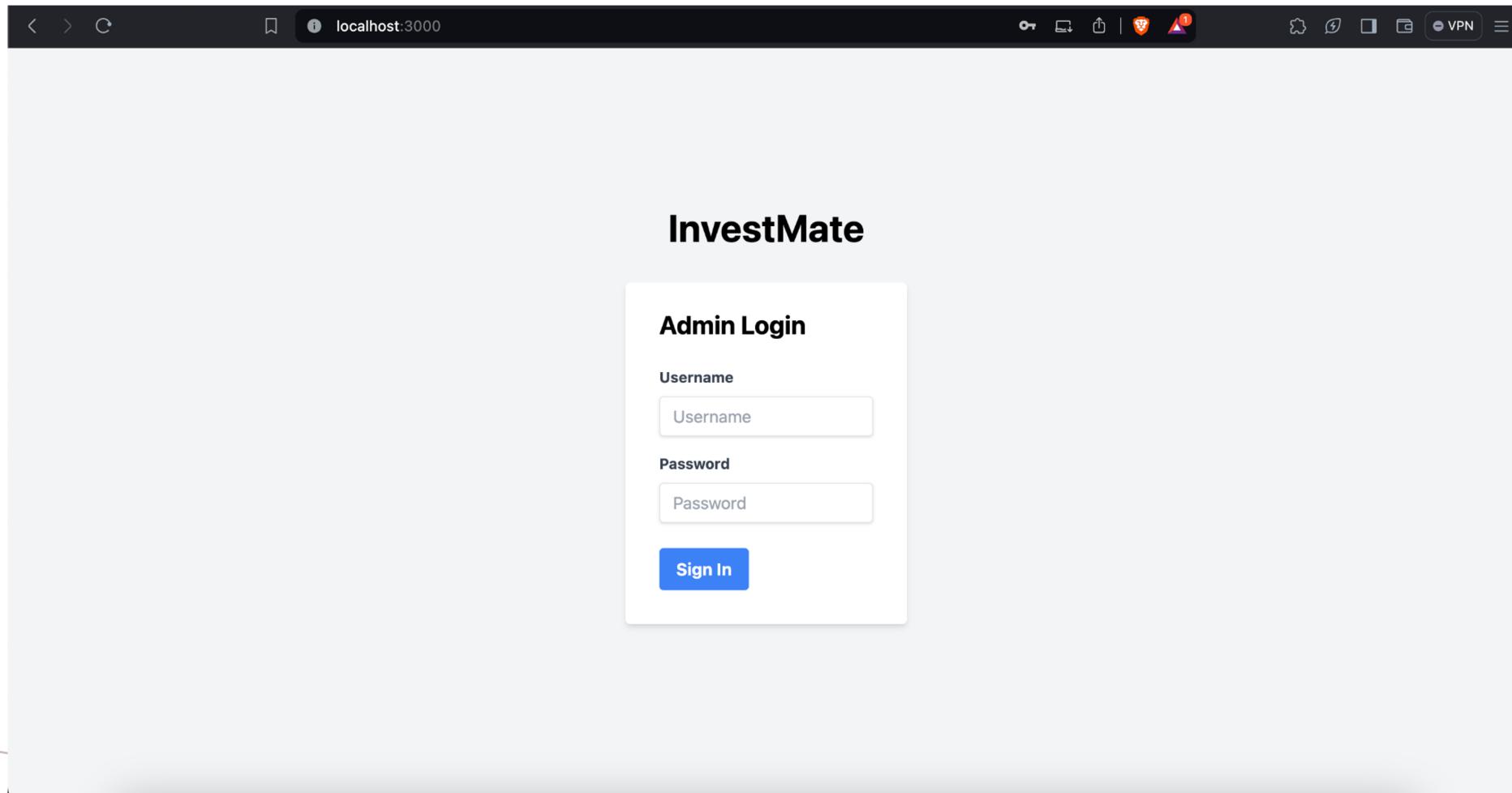
WIKI LINK

<https://github.com/htmw/2024Space-super-kings/wiki>

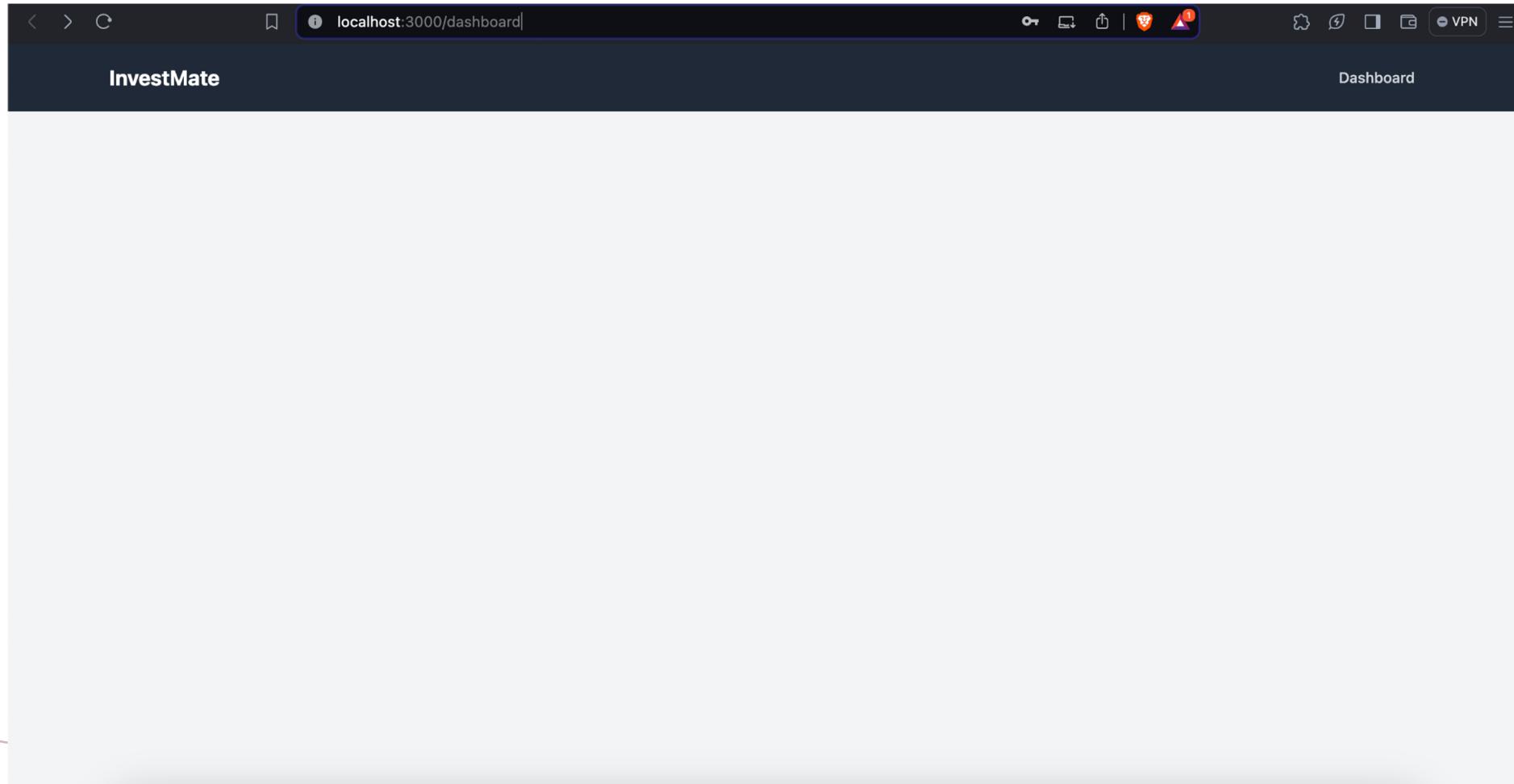
API Updates

- basic connection between nodejs and Mongo Db has been executed currently.
- it is able to connect to the database and all current operations are successful.
- Able to bring Live stock market data

Demo ScreenShots



Demo ScreenShots





THANK YOU