Title: Major Index Allocation Analysis

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Description: Gain a deeper understanding of how major indexes are structured and review history of indexes.   Use the data to compare to our analyzed portfolio (watchlist).   Find which index correlates the most with the analyzed portfolio. How are equities in portfolio rated and do you need to rebalance or buy or sell positions?

Research Questions:

How does portfolio allocation compare to major indices by industry and by market cap?

Is portfolio diversified enough? (Industry and Market Cap)

Which index does my portfolio most correlate with?

Do I own good equities?

Should I make changes to my portfolio? (Rebalance, Sell, Buy)

How does my existing portfolio outlook compare to a rebalanced portfolio?

Datasets to be used:

Each member will provide a csv with a portfolio of equities they wish to analyze. We will import a list of major index holdings and change history of each. Download data for previous years to use to outlook simulation.

Tasks: