Title: Portfolio Allocation Analysis

Team Member: Juan Carlos Castaneda, William Chance, Jorge Sira

Description:

Tool to help analyze how well a portfolio (watchlist) is diversified and how it compares to major indices. Find which index correlates the best with your portfolio. How are your equities rated and do you need to rebalance or buy or sell positions?

Research Questions:

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

Is my portfolio diversified? (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 stocks they own.

We will import stocks in the 3 major indexes and study the industry breakdown and market caps.

Download data for previous years to use to outlook simulation.

Tasks: