

MA615 Final Project

Project 3 portfolio manager
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Introduction

In this project, I built an app by using online investment advice that was available at the beginning of July 2020. to make investment decisions and then track my investments through the fall until 1 December. The Shiny app I built is called portfolio manager, which can check track the value of individual positions, positions by category, and portfolio value. To access financial data online, I used package “tidyquant”. In this application, you would initially have \$250,000 in cash starting on 1 July 2020, user can adjust the weight of five stocks to invest, and it would show how the portfolio goes until 1 December 2020.

How to use

Portfolio Manager

Start:

2020-07-01

End:

2020-11-30

weight must be a decimal from 0 to 1 with a max sum 1

GOOG WEIGHT:

0.2

AMZN WEIGHT:

0.2

FB WEIGHT:

0.2

NFLX WEIGHT:

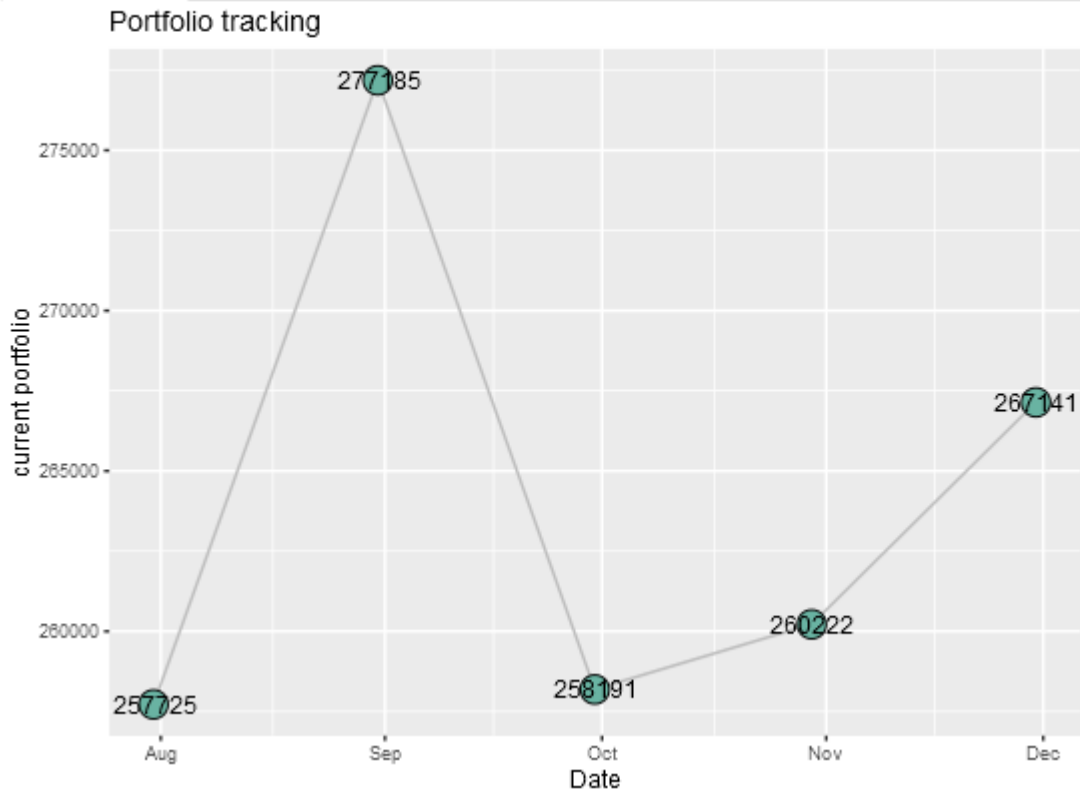
0.2

SPDN WEIGHT:

0.2

available advice:<https://www.ullandinvestment.com/2020/06/>

In the beginning, users are asked to choose the starting date and ending date. The range of choice is between 2020-7-1 to 2020-11-30. There are 5 popular stocks to compose your portfolio, Google, Amazon, Facebook, Netflix, and S&P 500 Bear 1X. User can separately type in or adjust weight of stocks by 0.05 each step. Weight must be a decimal number between 0 to 1, in addition, the sum of total 5 stocks weight cannot exceed 1.



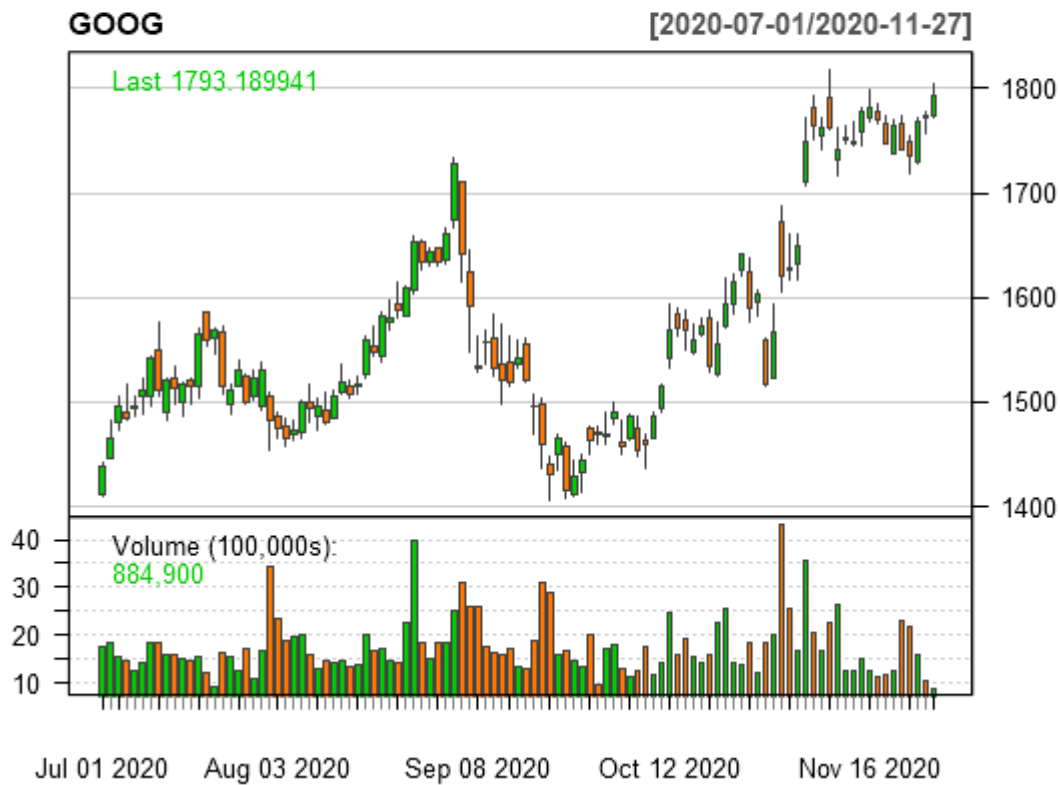
After doing the above steps, you will get a plot which shows the tendency of your portfolio values from 2020-7-1 to 2020-11-30. You can change the weight of stocks by referring online opinions to maximize your money in December.

Portfolio

Data

stocks:

Google



What is more, you can access more data by clicking the “Data” button nearby the Portfolio. You can see different standard financial charts given a time series by choosing different stocks. When you change the date range in the top, the plot would change. You will get more details by narrowing down the date range.

	date ↕	open ↕	high ↕	low ↕	close ↕	volume ↕	adjusted ↕
1	2020-07-01	1411.099976	1443	1409.819946	1438.040039	1775200	1438.040039
2	2020-07-02	1446.939941	1482.949951	1446.420044	1464.699951	1859100	1464.699951
3	2020-07-06	1480.060059	1506.589966	1472.859985	1495.699951	1564000	1495.699951
4	2020-07-07	1490	1516.800049	1483.550049	1485.180054	1458200	1485.180054
5	2020-07-08	1494.319946	1505.880005	1485.630005	1496	1249700	1496
6	2020-07-09	1506.449951	1522.719971	1488.084961	1510.98999	1423300	1510.98999
7	2020-07-10	1506.150024	1543.829956	1496.540039	1541.73999	1856300	1541.73999
8	2020-07-13	1550	1577.131958	1505.243042	1511.339966	1846400	1511.339966
9	2020-07-14	1490.310059	1522.949951	1483.5	1520.579956	1585000	1520.579956
10	2020-07-15	1523.130005	1535.329956	1498	1513.640015	1610700	1513.640015

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The table above is the data of your selected stock with date. You can change stock and date as same as the previous plot. The table shows important columns such as date, open, close, and adjusted, etc..