# Module 6: Capstone Project Description

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## Information about the Capstone Project which is scheduled for Module 7

**Prerequisite:** Know how to collate, design, and annotate stories in Tableau.

**Dataset:** Same datasets as Module 5 and 6 (including your selection of economic data)

**Instructions**: Instead of providing a generalized view of the markets, the objective is to direct the audience through a guided tour of the relative performance of the market defined by the S&P 500 sectors and how they have moved over time relative to the overall economy.

Create a story showing the biggest gainers and losers in the financial markets. You can compare those movements to any economic data you wish (as long as you can import the data into Tableau, you can use it). You can select any historical year (2000, 2008, 2019, etc.), preferably one that has a complete dataset. Which of the economic data series (and transformations of those series) you choose is up to you. You will not make any causal connections between the data. Simply, you need to comment on what you observe and lead the viewer through a storytelling arc through the events of the year.

Then, you will walk the viewer, step-by-step to describe what happened that year covering at least:

- Changes in the market by S&P 500 sector. Change should not be limited to price but at a minimum the change in the monthly return of the price series. You can look at the univariate or multivariate visualizations to notice any changes in the statistical properties or relationships. No change in their properties may be interesting as well if say the economic environment drastically changed.
- Changes in the overall S&P500
- Time-dependent changes
- Relationships between market components
- Changes to any macroeconomic variables and their relationships to the market

Use a quarterly resolution and walk through the full evolution of at least 1 sector from beginning to end. Show at least one instance of each of the following visualizations:

- Time series
- Slope chart
- Geospatial map
- Highlight table
- Heatmap

- Bar chart

Make sure to:

- Use annotations drawing attention to key events
- Focus the audience's attention via visual cues and designs
- Create decluttered visualizations that highlight the important takeaways
- Ensure that the flow follows a clear storytelling arc

**Due**: By end of the course (Sat midnight PST). -5% per day late.

**Outcomes**:

- Make use of storytelling principles.
- Develop an information layout.
- Implement best practices for focusing and decluttering.

**Format**:

- Save and export the saved workbook as a packaged workbook. (*.twbx file)
- Submit the file as your assignment submission.

## Rubric

The grading rubric for this assignment is located below.

## Submission

This is the description of the project. The actual submission and live link for the project will be made available in the next module.

*Click Next (below) to progress through the course.*

| | |
|---|---|
| **Points** | 0 |
| **Submitting** | Nothing |

| Due | For | Available from | Until |
|---|---|---|---|
| Feb 19 | Everyone | - | - |

**Capstone Project**

| Criteria | Ratings | | | Pts |
|---|---|---|---|---|
| Annotations | **10 to >8.0 pts**<br>**Full Marks**<br>Clearly supported with annotations and draws attention to key events. | **8 to >0.0 pts**<br>**Partial Marks**<br>Includes partial annotations and key events are somewhat clear. | **0 pts**<br>**Limited**<br>Does not include annotations. Key events are missed. | 10 pts |
| Visual Cues & Designs | **10 to >7.5 pts**<br>**Full Marks**<br>Visual cues and designs clearly highlight important takeaways. | **7.5 to >0.0 pts**<br>**Partial Marks**<br>Some visual cues and designs lack detail or are not covered in the submission. | **0 pts**<br>**No Marks**<br>Lacks focus and does not include the use of visual cues or designs. | 10 pts |
| Storytelling | **10 to >7.5 pts**<br>**Fulll Marks**<br>Information layout includes a flow that follows a clear storytelling arc. | **7.5 to >0.0 pts**<br>**Partial Marks**<br>Information layout is confusing and somewhat follows a storytelling arc. | **0 pts**<br>**No Marks**<br>Information layout lacks flow does not follow a storytelling arc. | 10 pts |
| Execution | **5 to >3.0 pts**<br>**Full Marks**<br>Executes correctly with no syntax or runtime errors. | **3 to >0.0 pts**<br>**Partial Marks**<br>Executes with error. | **0 pts**<br>**No Marks**<br>Does not execute. | 5 pts |
| Correct Output | **5 to >3.0 pts**<br>**Full Marks**<br>Displays correct output with no errors. | **3 to >0.0 pts**<br>**Partial Marks**<br>Output has errors. | **0 pts**<br>**No Marks**<br>Output is incorrect. | 5 pts |
| Design of Output | **5 to >3.0 pts**<br>**Full Marks**<br>Displays more than expected. | **3 to >0.0 pts**<br>**Partial Marks**<br>Displays minimally expected output. | **0 pts**<br>**No Marks**<br>Does not display the required output or output is poorly designed. | 5 pts |

| Criteria | Ratings | | | Pts |
|---|---|---|---|---|
| Design of Logic | **5 to >3.0 pts**<br>**Full Marks**<br><br>Logically well designed. | **3 to >0.0 pts**<br>**Partial Marks**<br><br>Logic errors that do not significantly affect the results. | **0 pts**<br>**No Marks**<br><br>Significant logic errors or logically incorrect. | 5 pts |
| | | | Total Points: 50 | |