Project Plan
Integrated Analyst Ratings and Notes
The Capstone Experience
Team Principal

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Functional Specifications

• Create robust ratings and notes capabilities that may incorporate additional media
• Support intelligent distribution of the notes/ratings
• Maintain both current and historical notes/ratings
• Leverage cloud computing (Amazon Web Services)
Design Specifications

• Incorporate functionality of 4 systems across 3 boutiques into one comprehensive tool
• Allow users to easily view the reporting history of an investment opportunity
• Provide each boutique with a user experience that feels tailored to them
• Notify users of changes in holdings to expedite the decision-making process
Screen Mockup: Welcome Page

Recently Viewed

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Screen Mockup: User Profile Page
Screen Mockup: Make PPFI Ratings
Screen Mockup: View PPFI Ratings

Company: International Business Machine
CUSIP/CIN: 459200101
Decision: UNDERPERFORM
PGI Factor Score: 45

Fundamentals (6-9 Months):
- Revenue: ###<weight>
- Leverage: ###<weight>
- Profitability: ###<weight>
- FCF Generation: ###<weight>
- Credit Risk (Quantitative): ###<weight>
- Quality of Management: ###<weight>
- Environmental/Social/Governance: ###<weight>
- Regulatory/Legal Environment: ###<weight>

Total: 62 <weight>

Comments:
Fundamentals Comment: Johnson 1/29/2019

Technicals (3-6 Months):
Total: 47 <weight>

Valuation (Current):
Total: 25 <weight>

Investment Thesis:
Screen Mockup: Report History
### Screen Mockup: Search Results

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Filter: All
Technical Specifications

• Use Amazon Web Services’ SDK for user authentication and role information

• The PostgreSQL database will store data for
  ▪ Investments
  ▪ Ratings
  ▪ User Subscriptions
  ▪ Tags

• Security between boutiques will be maintained by creating multiple instances of the application
Technical Specifications
System Architecture
System Components

• Hardware Platforms
  ▪ Amazon Web Services – Amazon Elastic Compute Cloud (EC2)

• Software Platforms / Technologies
  ▪ PostgreSQL
  ▪ PHP
  ▪ JavaScript
  ▪ HTML
  ▪ CSS
Risks

• Integrate web app into client's SSO
  ▪ Application must integrate with current SSO through AWS
  ▪ Work with client to understand current solution

• Verify system will comply with government regulations
  ▪ Financial regulations set in place by the federal government that application must follow
  ▪ Work with Principal to ensure the system meets all requirements

• Accommodate the functionality of 4 different systems that are currently in use
  ▪ Application needs to merge the systems currently used by the different boutiques without losing functionality
  ▪ Iterate through mockups with the client and analysts before implementing the front-end
Questions?