



Investment Club Integrated Platform

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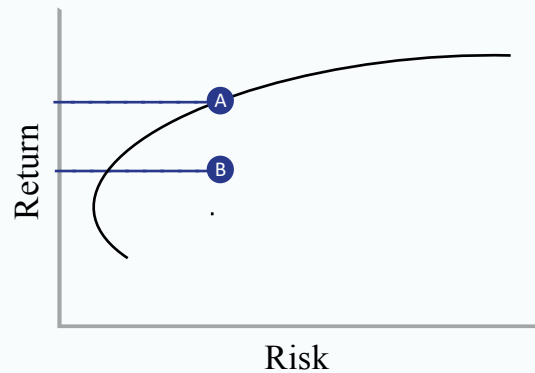
Abstract

- Trinity College Investment Club invests \$500,000 of the school's endowment in the stock market
- TCIC Goals:**
 - Preparing its members
 - Educating the club
 - Making investment profits
- Website Accomplishments:**
 - Transparent communication
 - Increase market conversation
 - Potential investment ideas

Features

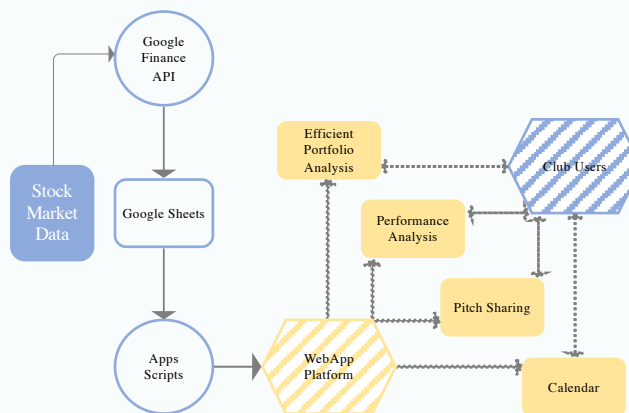
- Efficient Portfolio Analysis
- Performance Analysis
- Pitch Sharing
- Calendar

Modern Portfolio Theory



- Finds the highest return for a given level of market risk
- Portfolio **A** is more efficient than Portfolio **B**
- This theory is applied to the Efficient Portfolio Analysis feature of the platform

Platform System Diagram



Efficient Portfolio Calculation

1 Create a hypothetical efficient portfolio

The screenshot shows the 'Stock Analysis' page. It includes a search bar, a '+ New entry' button, and a table with the following data:

Ticker	Holding Shares
AAPL	18
AMZN	6

2 Add, edit and delete stock entries into the input chart

Two 'Add new entry' forms are shown. The first form has 'Ticker' set to 'AAPL' and 'Holding Shares' set to '18'. The second form has 'Ticker' set to 'AMZN' and 'Holding Shares' set to '6'. Both forms have buttons for 'CANCEL', 'DELETE', 'EDIT', and 'ADD NEW ENTRY'.

3 Algorithm outputs efficient buying and selling trades

The screenshot shows the 'Stock Recommendations' page. It includes a search bar and a table with the following data:

Ticker	Holding Shares	Price	Holding Value	Actual Weight	Efficient Weight	Recommendation
AAPL	18	\$119.62	\$2,153.16	25.28%	11.518%	sell
AMZN	6	\$2,023.80	\$12,142.80	57.32%	102.24%	buy
SPY	18	\$198.64	\$3,575.52	54.67%	16.92%	sell
3000	5	\$41.32	\$206.60	1.84%	45.54%	buy

Tools and Technology

- Financial Modeling by Simon Benninga – Technical Knowledge
- Google Finance API & AppsScript – Algorithm and Back-End
- WpDataTables – Back-End to Front-End Connection
- WordPress – Front-End