

MICHIGAN STATE

U N I V E R S I T Y

Beta Presentation

Integrated Analyst Ratings and Notes

The Capstone Experience

Team Principal

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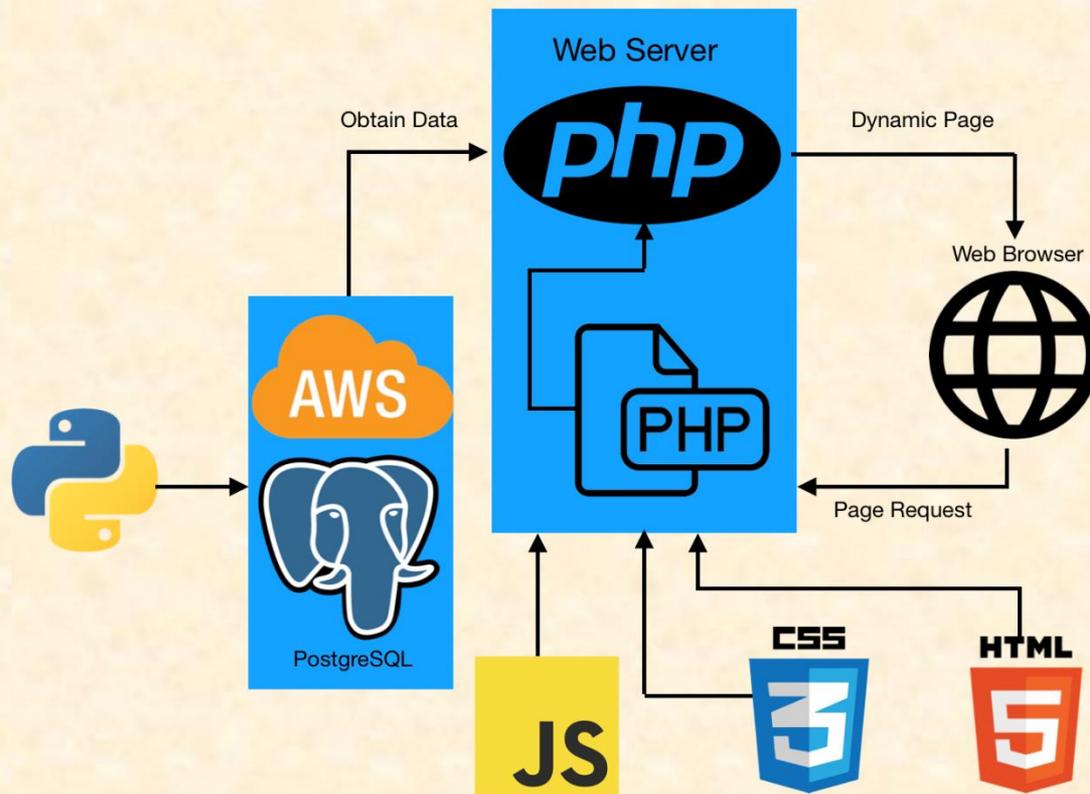
*From Students...
...to Professionals*

Project Overview

- Develop a web application for analysts to input context sensitive numerical ratings and prose notes
- Support intelligent distribution of the notes and ratings, and maintain both current and historical data
- Leverage cloud computing (Amazon Web Services)



System Architecture



Welcome Page

Principal | Home | Create New Rating | Subscription Management | Search... | Reports

Technology Analyst
Alexana Steck | My Reports

Recently Edited					
Link	Company	Date	Overall Score	Investment Thesis	Decision
Link	Apple	2019-04-01 18:40:06	33.4	This is a great Stock...	9
Link	Ford	2019-04-01 18:39:51	46.4	Ford is doing nothing groundbreaking. Hold for no...	Hold
Link	Ford	2019-04-01 18:35:24	46.2	Ford is doing nothing groundbreaking. Hold for now...	Hold
Link	Cisco Systems	2019-04-01 18:33:04	29.4	Cisco is coming out with new routers that will cha...	Buy
Link	Apple	2019-04-01 18:32:01	33.2	This is a great Stock...	9

Recently Viewed					
Link	Company	Date	Overall Score	Investment Thesis	Decision
Link	Apple	2019-04-01 18:40:06	33.4	This is a great Stock...	9
Link	Apple	2019-04-01 18:40:02	33.2	This is a great Stock...	9
Link	Ford	2019-04-01 18:39:51	46.4	Ford is doing nothing groundbreaking. Hold for no...	Hold
Link	Ford	2019-04-01 18:39:45	46.2	Ford is doing nothing groundbreaking. Hold for now...	Hold
Link	Cisco Systems	2019-04-01 18:39:33	29.4	Cisco is coming out with new routers that will cha...	Buy



Ratings History Page

Report History

localhost/reportHistory.php?company=Ford

Principal Home Create New Rating Subscription Management Search... Reports

History						
CUSIP/CISN	Report Name	Report Type	Analyst	Tags	Date Published	PGI Factor Score
829174913	Ford	Technology	Lance Frahm	TAGS	2019-03-03 20:30:43	49
238429	Ford	Technology	Alexana Steck	TAGS	2019-04-01 18:35:24	46.2
238429	Ford	Technology	Alexana Steck	TAGS	2019-04-01 18:39:51	46.4

03/02/2019 to 04/01/2019 Submit



PGFI Notes/Ratings Entry

Rating Page
localhost/addRating.php

Principal Home Create New Rating Subscription Management Search... Reports

Technology

Company: IBM
CUSIP/CISN: 23945480
Decision: Hold
PGI Factor Score:

Fundamentals

Revenue: 9
FCF Generation: 8
Credit Risk: 7
Environmental: 6

Strong fundamental technology in the company.

Technical

Event Risk: 4
Expected Issuance: 6
Ratings Outlook: 3
Volatility: 9
Liquidity Assessment: 10



PPS View

Principal Home Create New Rating Subscription Management Search

Search... Search...

Search

Search... Other

Turn off color?

Search Results

Ticker	Investment Name	Unique Identifier	Index	Investment Name	1 Year Peer group percentile	3 Year Peer group percentile	5 Year Peer group percentile	5 Year Peer group percentile / Or SI if less than 5 Year Track Record	1 Year Rank Score	3 Year Rank Score	5 Year Rank Score	3 Year Information Ratio (geo)	5 Year Information Ratio (geo)	5 Year Information Ratio (geo) / Or SI if less than 5 Year Track Record	3 Year Info Ratio Score	5 Year Info Ratio Score	3 Year Overall Capture Ratio	5 Year Overall Capture Ratio	5 Year Overall Capture Ratio / Or SI if less than 5 Year Track Record	3 Year Capture Score
FOUSA08YUU	Principal Trust Income I	Principal Trust Income Gross	S&P Target Date Retirement Income TR USD	CIT SI	71	67	63	63	0.5	0.75	0.75	-0.668048	-0.758232	-0.758232	0	0	0.988827	0.967073	0.967073	0.5
FOUSA08YUW	Principal Trust Target 2010 I	Principal Trust Target 2010 Gross	S&P Target Date 2010 TR USD	CIT 2010	50	62	48	48	0.75	0.75	1.5	-0.142342	0.381705	0.381705	0.5	1	0.9933	1.01603	1.01603	0.5
FOUSA08YUX		Principal Trust Target 2015 Gross	S&P Target Date 2015 TR USD	CIT 2015	43	35	41	41	0.75	1.5	1.5	0.086275	0.325702	0.325702	1	1	1.01956	1.0257	1.0257	1
FOUSA08YUY	Principal Trust Target 2020 I	Principal Trust Target 2020 Gross	S&P Target Date 2020 TR USD	CIT 2020	23	19	18	18	1	2	2	0.305147	0.472361	0.472361	1	1	1.01999	1.01667	1.01667	1
FOUSA08YUZ	Principal Trust Target 2025 I	Principal Trust Target 2025 Gross	S&P Target Date 2025 TR USD	CIT 2025	35	19	21	21	0.75	2	2	0.331611	0.534019		1	0	1.02193	1.02235	1.02235	1
FOUSA08YV0	Principal Trust Target 2030 I	Principal Trust Target 2030 Gross	S&P Target Date 2030 TR USD	CIT 2030	42	24	24	24	0.75	2	2	0.324496	0.544625	0.544625	1	1.5	1.03245	1.03661	1.03661	1
FOUSA08YV1	Principal Trust Target 2035 I	Principal Trust Target 2035 Gross	S&P Target Date 2035 TR USD	CIT 2035	57	26	27	27	0.5	1.5	1.5	0.201956	0.429819	0.429819	1	1	1.03498	1.03806	1.03806	1



What's left to do?

- Continue refining the layout of the site
- Clean and comment code
- Implement suggestions from second client demo



Questions?

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