

Cosmic Trajectories

Cultivating Financial Analysis Tools for the Investment Advisors Niche

Course: EPPS 6354 - Information Management

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Progress Report

Progress lately has leaned more toward infrastructure than output. The emphasis has been on making sure the system understands its own data before asking it to do anything sophisticated with it.

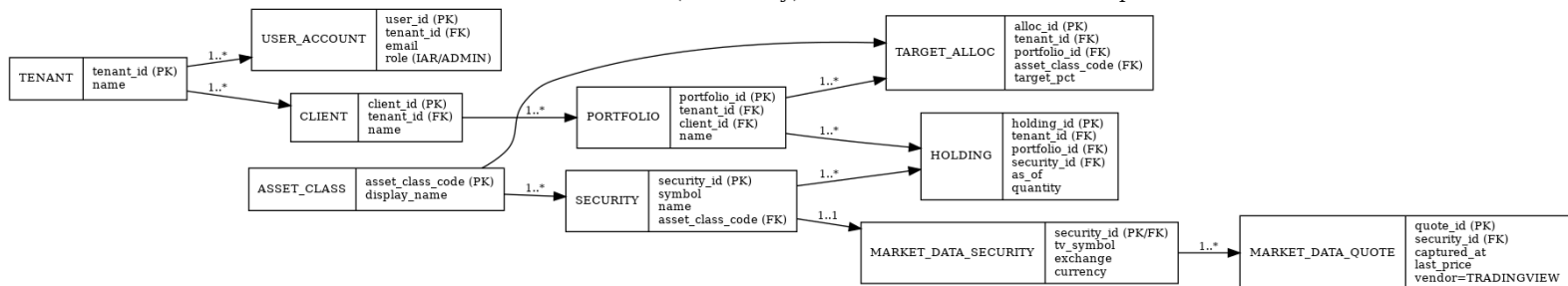
On the market data side, we've reached a meaningful milestone. Data extraction from TradingView is now operational, allowing securities to be paired with live pricing inputs in a structured format. It's not entirely polished (there are still edge cases that need attention), but the pipeline itself exists and is stable enough to build on. That alone shifts the project out of the conceptual stage and into something more tangible.

The next step shifts us into building the actual storage layer. At its core, this means structuring the database so each tenant (RIA) owns its ecosystem: its clients, those clients' portfolios, and the securities sitting inside them. From there the schema will need to be built out to enforce clean separations while maintaining usable relationships. Clients must link to portfolios, portfolios to securities, and securities to both asset classes and market data records without overlap or ambiguity. This will be tested with a mock RIA.

The final planned phase this semester will be the correlation application. The correlation tool must reliably pull and process this data without misalignment. From there, the challenge becomes user-facing: enabling advisors to input, edit, or import their portfolios. That part is still open-ended and likely to evolve a bit as real usage patterns emerge.

If time allows, other portfolio analysis tools, such as historical performance tools, may be built out.

Schema for Reference



A.I. Disclosure

Artificial intelligence (AI) software is used in the development of Cosmic Trajectories, including, but not limited to, debugging code, drafting marketing material, and brainstorming. All final product art will be manmade. AI will continue to be used as a tool for developers throughout the project.

References

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