

**Date:**

10/8/18

**Discussion:**

- Sharpe Ratio:  $(\text{Expected return} - \text{risk-free rate}) / (\text{std. Dev. of return})$

**Needs:**

- Interactive tool for a user to initialize portfolio optimization with constraints from the user, tweak things to produce and optimized portfolio for the user to see.
  - Dash, open source interfaces. Research for deliverables
- Front-end reach out to Ben for possible user interviews
  - Looking into web based (native or web app)

**Professionalism Moving forward:**

- Need to be more clear on progress, roles, deliverables, etc.
  - Communication needs to be improved both between team and to principal
  - Weekly updates done earlier
  - Need to be clearer on tasks to be done
    - Tasks need to be done earlier in the week so team members can review others work/code
  - Can't just say "research" or "Read into this concept", need to show deliverable from it
    - This can be as simple as showing notes from it to as complex as a lit review paper (Obviously we don't need to go that in depth for times sake)
    - Notes/documentation of what we learned and questions we had is enough

**New meeting time due to classes:**

- 4:15 sharp meeting time
  - Need to be professional, start on time, come prepared