

**Date:**

11/14/2018

**Attendance**

- Our Team:
  - Blake, Nick, Lee, Kevin
- Principal:
  - Ben
- Advisor:
  - Chinmay

**Questions going into the meeting**

- PowerBI

**Overview on what was Discussed**

- PowerBI examples
- How are we going to use this?
- Backend

**Discussion**

- Basics to PowerBI
  - Fairly intuitive, drag-and-drop visualizations, import data from common sources, can run Python scripts on dataset, data interaction built-in
- Need to marry PowerBI and inputting user constraints
  - PowerBI only does visualization
- **ASAP: Figure out PowerBI Pro licensing and send price to Ben**
- Clarify what a portfolio will give us (Art, John)
  - Only grab current weights from portfolio (for visualization)
  - Then build covariance from NCREIF using the same markets/property types as portfolio
- Showed how we run our code
- Look into giving him access to codebase
  - Ben has, possibly, been sent an invite link
- Figure out range of risk values for efficient frontier
- In coming weeks, Ben will help figuring out what the dashboard will look like
  - Ames Monday 3pm before our weekly meeting?
  - Beneficial to meet Ben in person
- Unit tests to make sure optimization is correct
  - 2 assets have perfectly negative correlation