

**Date:**

04/25/2019

**Attendance**

- Our Team:
  - Blake, Cole, Kevin, Lee, Nick
- Other:
  - Ben, Jonathan Frank, Chinmay

**Questions going into the meeting**

- Demo

**Overview on what was Discussed**

- Current Progress

**Discussion**

- We've got mostly everything coded, but a few bugs
- Presentation for Principal stakeholders
  - May 7-10 open for Principal
- Efficiency Frontier
  - Weird data
  - Shouldn't have lower risk than the frontier lines
  - Normalize weights to sum to 1.0
  - Dots have variable size (based on market value)(percentage of portfolio)
  - Include ~ top 20 markets
  - Resize whole graph to fit page
  - Don't need optimized portfolio, but change color
  - Can use midpoint as optimized portfolio graph
  - Different colors or textures for dots (don't need)
- PBI report needs updating
  - Help: have picture describing what the report is saying
  - Have more filters (using slicer)
    - (property type, region) (ddl for market) , market-property type pairs
- Calculating expected return as annual (Ben will email stakeholders)
- Send current code base to Ben
- UI
  - More visually appealing, small icons and pictures
  - Text headers need updating
  - Run Opt needs to stand out
  - Minor UX changes to text directions
- Only do demo Monday, more Principal members will be there