

TEAM R&I

Client Meeting Agenda

Meeting/Project Name:	2018T2 R&I		
Date of Meeting (DD/MM/YYYY):	08/07/2019	Time:	19:00 – 21:00
Meeting Facilitator:	Liting	Location:	SIS GSR 3-4

1. Meeting Objective

1. Weekly Update
2. Ngee Ann Polytechnic Sharing Session
3. Demo/Questions

2. Attendees

Name	Attendance	Remarks
Chow Li Ting	Present	-
Teng Shu Yan Rachel	Present	-
Thevakumaren S/O Morgaya	Present	-
Raghavendar Gowri Sankar	Present	-
Mok Hao Ze Benjamin	Present	-
T S Kautham	Present	-

3. Pre-work/Preparation (Documents/Handout to bring, reading materials, etc)

Description	Prepared By:
-	-

4. Agenda and Notes, Decision, Issues

Topic	Owner
Weekly Update <ul style="list-style-type: none">- Refresh to Login is completed in a separate branch.<ul style="list-style-type: none">o Upon completion, then we merge with the rest.- Client Management all done except for update.- Array Manipulation<ul style="list-style-type: none">o If the order status is failed, notify and go to order history.o If it is passed, it will go to order history.- Loop thru to get distinct currency<ul style="list-style-type: none">o Depending on the what we choose, they will give us the specific period.o Benchmark interest rate is fixed	Liting
Handover Document <ol style="list-style-type: none">1. Lab Guide (How to compile, generate war file)2. Codes	Liting

3. Extensions		
<u>Ngee Ann Polytechnic Sharing Session</u> Date: 1 August 2019 Timing: 4pm – 5pm Things to be done: Stock Order, DCD and Loan documents Things to buy: Chocolates or cookies for 40-50pax We will have to reach NP at 3pm. <u>Context:</u> <ol style="list-style-type: none"> 1. 2-3 person per pax. 2. They already have the tbank account or take the excel from Prof Alan to compute the username. 3. 15 mins doing wealth portfolio slides (need slides dcd, loans and stocks) 4. DCD > Loan > Stocks <ol style="list-style-type: none"> a. If insufficient fund, then take up the loan. 		Liting
<u>Demo/Questions to ask</u> <ul style="list-style-type: none"> - For customer owned stock, should it be zero or be gone? <ul style="list-style-type: none"> o Keep it as zero because as an investor, they should want to see it. - JSON edit need to cater into timeline. - FX Forward API (getFXForwardRate) <ul style="list-style-type: none"> o Global Error ID is null, it doesn't register as a success. <ul style="list-style-type: none"> ▪ Should be 0 or 1 - FX Forward "Buy" is auto complete but "Sell" is based on the amount with us. - Overwriting the price with the most recent price. - "Select stock" symbol should not be there if the quantity is zero - Should we allow 4m FX Forward (or stick with 3m or 6m)? <ul style="list-style-type: none"> o Need use the data from 3m and 6m to compute with the average of 4m (need research) o Do it in the backend. - Put DCD inside wealth management. 		Rachel

5. Action Item		
Action	Owner	Due Date
Change y-axis of stock watch	Rachel	19/7/2019
Put DCD Tab into Wealth Management Tab	Rachel	1/8/2019

6. Next Meeting (if applicable)	
Date (DD/MM/YYYY):	22/07/2019
Time	1900 - 2000
Location	SIS GSR 3-1
Objective	Weekly Update