

# Calculate Dashboard

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workflows/com/finmars/expert-opinions/dashboard



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<input type="checkbox"/>	data_transformer.ipynb	workflows/com/finmars/expert-opinions/dashboard	2025-04-18 19:41:4
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Open **data\_transformer.ipynb**

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Playbook 
Save Execute Add Cell

```

1 import jwt
2 import copy
3 import json
4 import requests
5 import traceback
6 import math
7 import statistics
8 from datetime import datetime, timezone
9 from dateutil.relativedelta import relativedelta
10 from requests.auth import HTTPBasicAuth
11
12 from workflow.api import task
13 from workflow.finmars import storage, utils, vault, request_api, create_logger
14
15 END_DATE = "2025-03-26"
16
17
18 def extract_float_percent(pct_str):
19     try:
20         return float(pct_str.strip('%')) / 100
21     except:
22         return 0.0
                
```

Run **Execute Cell** button

Scroll to **Init** method

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Playbook 
Save Execute Add Cell

```

223 # print("experts", experts)
224
225 # all_results = []
226 # for expert in experts:
227     # expert_results = calculate_expert(expert)
228     # for expert_result in expert_results:
229         # all_results.append(expert_result)
230
231 # file_name = "/workflows/com/finmars/expert-opinions/dashboard/experts_portfo
232 # storage.save_text(file_name, json.dumps(all_results))
233
234 # write_experts(experts)
235 experts = read_experts()
236
237 # pick a specific one
238 # Execute one by one, because its too heavy
239 processed_expert = process_single_expert(experts[0])
240 # processed_expert = process_single_expert(experts[1])
241 # processed_expert = process_single_expert(experts[2])
242
243 # optionally save updated expert.json after each one
244 write_experts(experts)
                
```

Processing: Abeta

Each expert calculated **independently**, because calculation time is too big, so, depends on how many experts you need to

```
processed_expert = process_single_expert(experts[0])
```

**and then press Calculate, when finished do**

```
processed_expert = process_single_expert(experts[1])
```

And so on

When all experts are calculated you need to scroll down, to next Cell, and combine results into single JSON

```
monthly_returns [0.0, 3.034851340749205, -2.7208184016293284, 0.38265135040605935, 0.15922  
monthly_std 1.0668908220558968
```

```
1 import os  
2  
3 def merge_expert_results():  
4     merged = []  
5     for expert in read_experts():  
6         file_name = f"/workflows/com/finmars/expert-opinions/dashboard/expert_{expert['expert_id']}_result.json"  
7         # if storage.file_exists(file_name):  
8             expert_data = storage.read_json(file_name)  
9             merged.extend(expert_data)  
10  
11     output_file = "/workflows/com/finmars/expert-opinions/dashboard/experts_portfolios.json"  
12     storage.save_text(output_file, json.dumps(merged))  
13  
14  
15 merge_expert_results()
```

So, in the end you need to verify that file **/workflows/com/finmars/expert-opinions/dashboard/experts\_portfolios.json**

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My Finmars / workflows / com / finmars / expert-opinions / dashboard / experts\_portfolios.json

Save Format JSON

```

1 [
2 {
3   "expert": "Navigator",
4   "closing_period": "none",
5   "items": [
6     {
7       "portfolio": "Expert Portfolio",
8       "portfolio_id": "3_none_",
9       "inception_date": "2021-05-01",
10      "ann_return": "7.6%",
11      "avg_return": "4.3%",
12      "ann_vola": "36.1%",
13      "rating": "-0.7%",
14      "raw_meas": "-0.006999999999999999"
15    },
16    {
17      "portfolio": "Alpha Portfolio",
18      "portfolio_id": "3_none_alpha",
19      "inception_date": "2021-05-01",
20      "ann_return": "-0.6%",
21      "avg_return": "1.3%",
22      "ann_vola": "18.2%",
23      "rating": "0.7%",
24      "raw_meas": "-0.006999999999999999"
25    }
26  ]
27 }

```

If file is ready then

Go to Dashboard to see results

**Experts**

Select	Name	Telegram
<input checked="" type="checkbox"/>	Navigator	t.me/navigator

**Portfolios**

Expert	Closing period	Portfolio	Inception date	Ann. return	Avg. return
Navigator	none	Expert Portfolio	2021-05-01	7.6%	40.2%
		Alpha Portfolio	2021-05-01	-0.6%	75.1%
		Beta Portfolio	2021-05-01	8.0%	-12.6%

Well done!

Revision #3

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