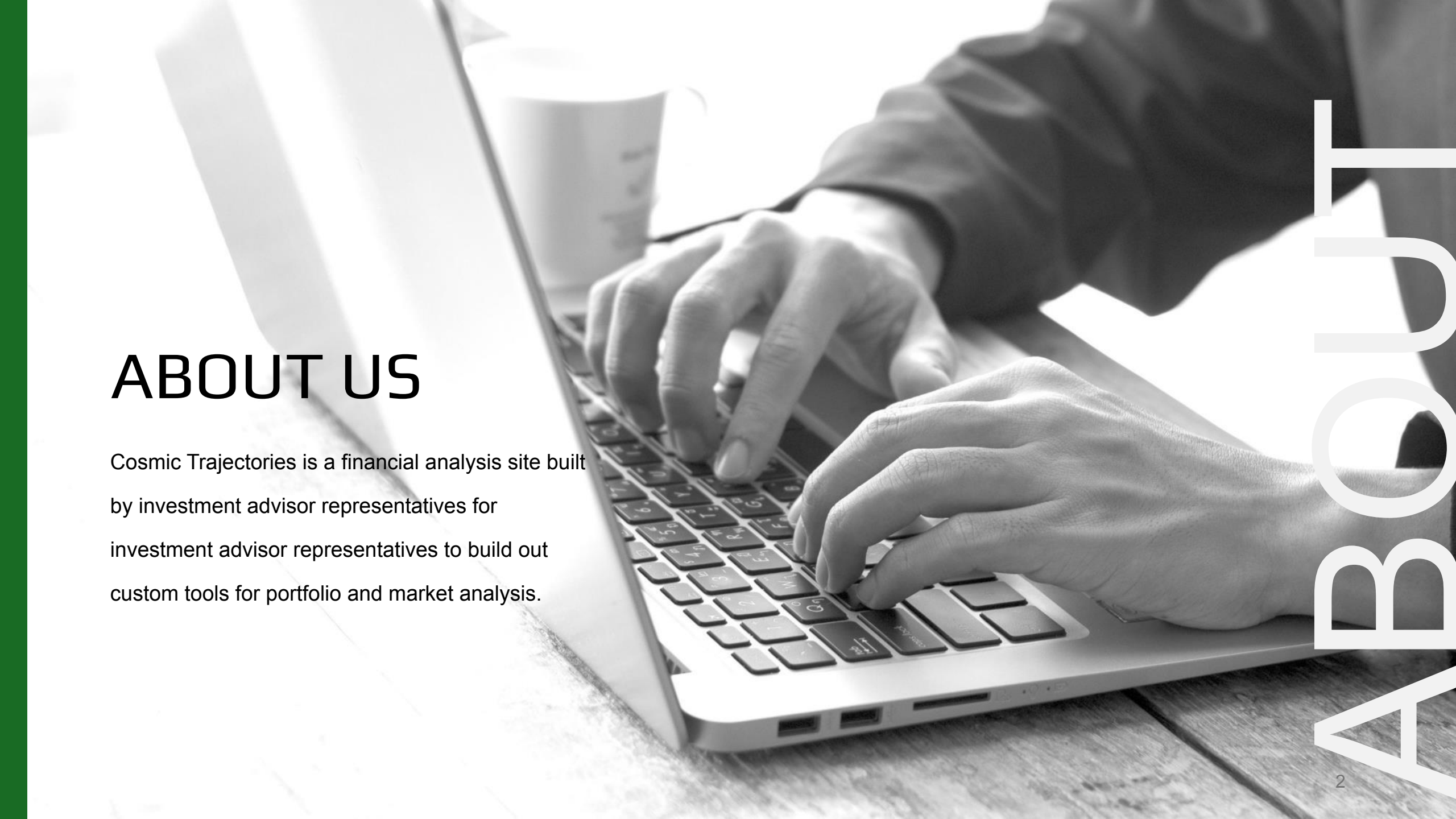




Final Presentation

A black and white photograph of a person's hands typing on a laptop keyboard. The laptop is open, and the keyboard is visible. In the background, there is a cup of coffee. The image is used as a background for the slide.

ABOUT US

Cosmic Trajectories is a financial analysis site built by investment advisor representatives for investment advisor representatives to build out custom tools for portfolio and market analysis.

Home

PROBLEM

SOFTWARE TARGETS TRADERS

Current analytics software is targeted towards traders and chartered analysts and is limited in relevant tools for investment advisors.

OUTDATED TOOLS DOMINATE

Advisors are left utilizing Excel to run the analysis needed in a way accessible to associates, partners, and clients.

HIGH OPPORTUNITY COST

Time is lost keeping data up-to-date for both current portfolio accuracy and current market analysis.

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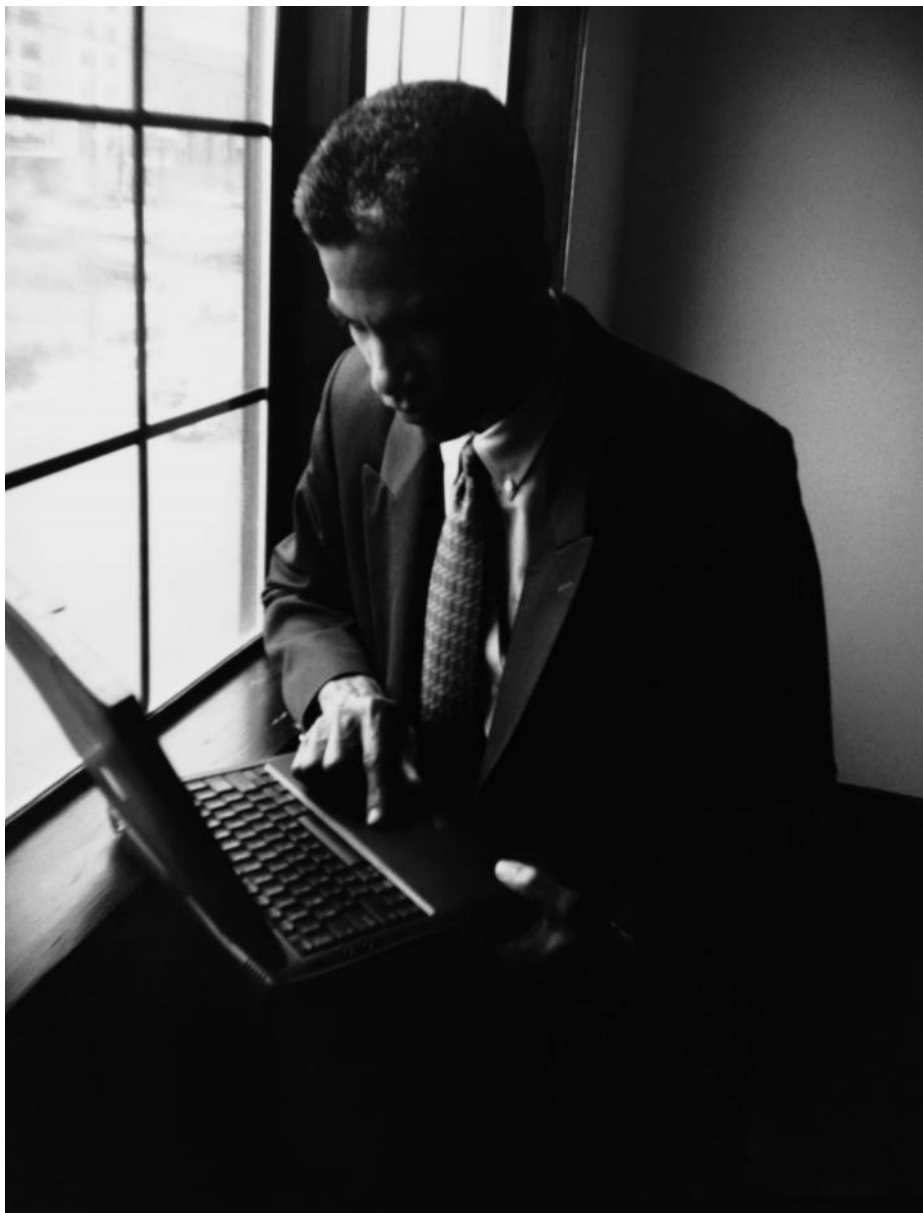
 ADDEPAR

 thinkorswim

 salesforce platform

 koyfin

PROBLEM



Product

TOOLS TAILORED TO ADVISOR NEEDS

Our product makes understanding your portfolio's efficiency easier, and no other product on the market offers the same niche focus.

TARGET AUDIENCE

Registered Investment Advisors

SALEABLE SOPHISTICATION

Some tools will be built entirely for any advisor to use easily. Others will require advisors to know basic programming skills for more sophisticated analysis.

MEET THE TEAM



Joseph Martinez



SEMESTER STRATEGY

FEB 2026

Source Quote Vendors and
Databases

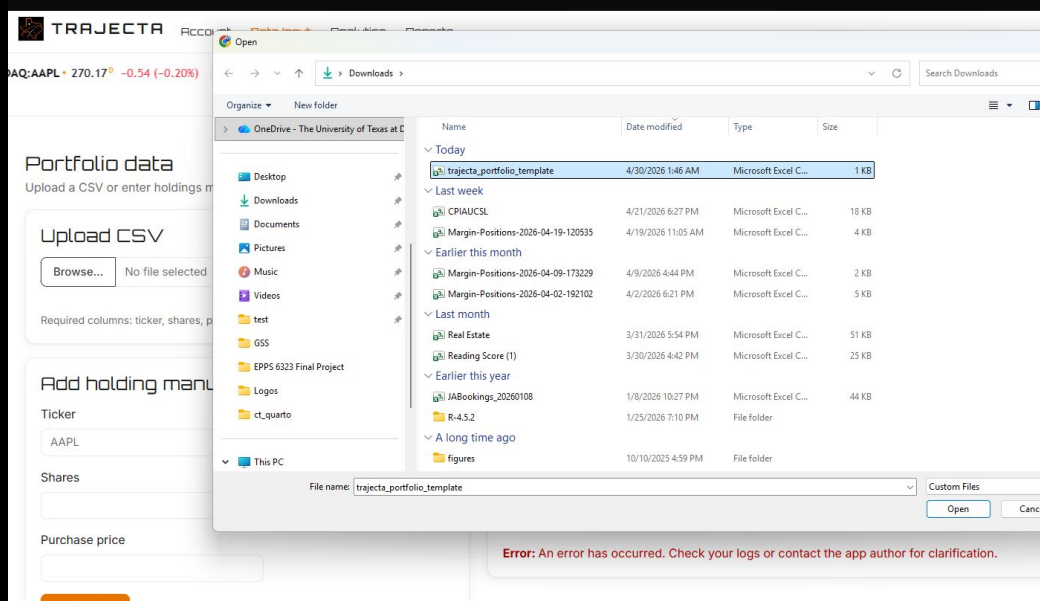
APR 2026

Roll out test Runs of
Correct Analysis
Applications and Tools

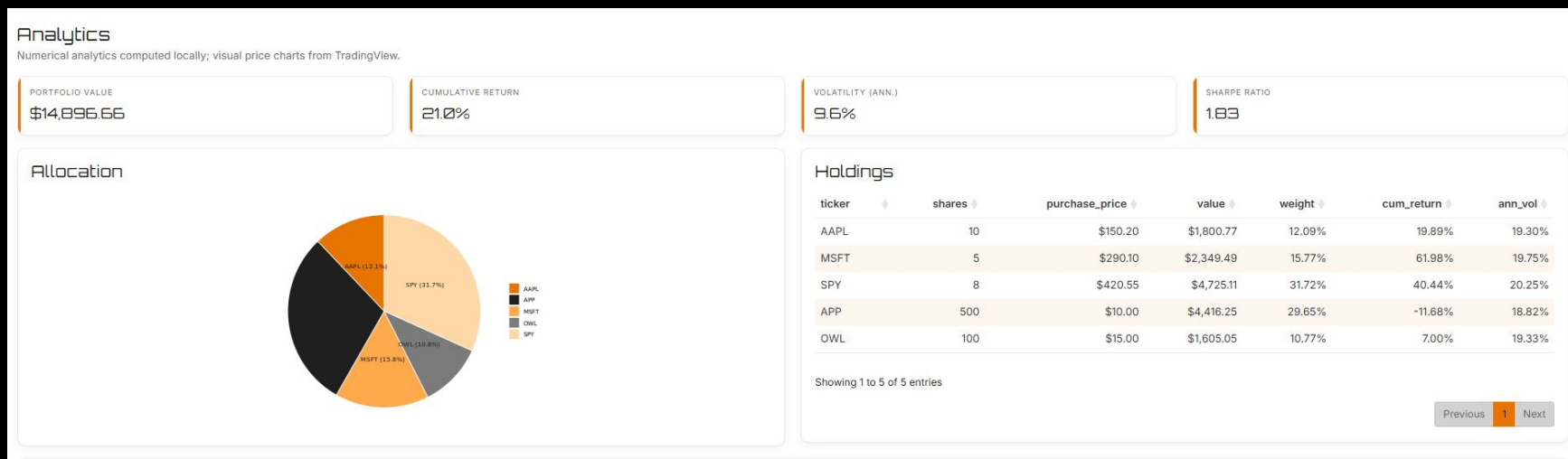
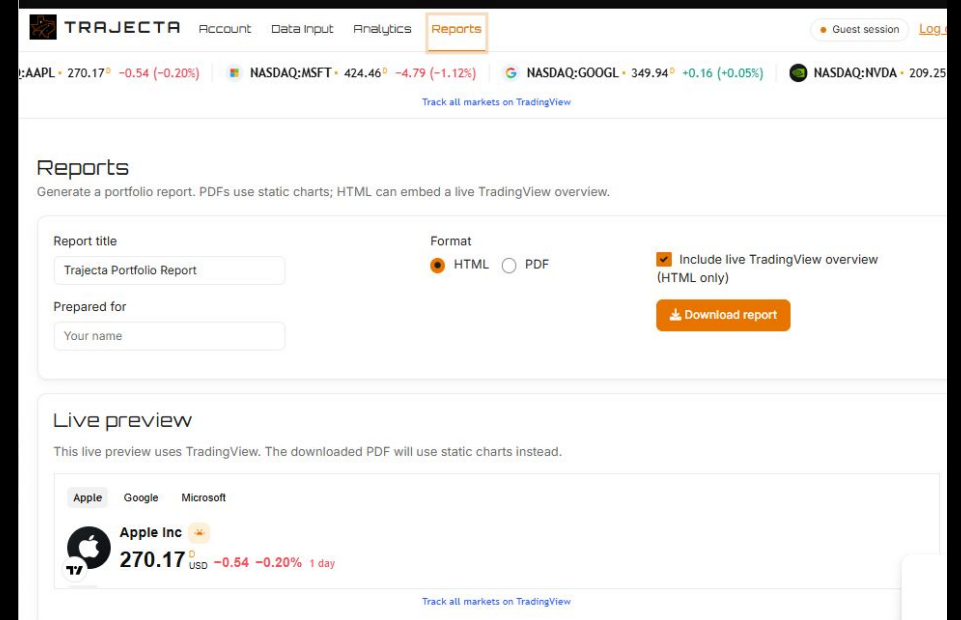
MAY 2026

Launch Module with
Application ready to be
utilized by users

Early Wins



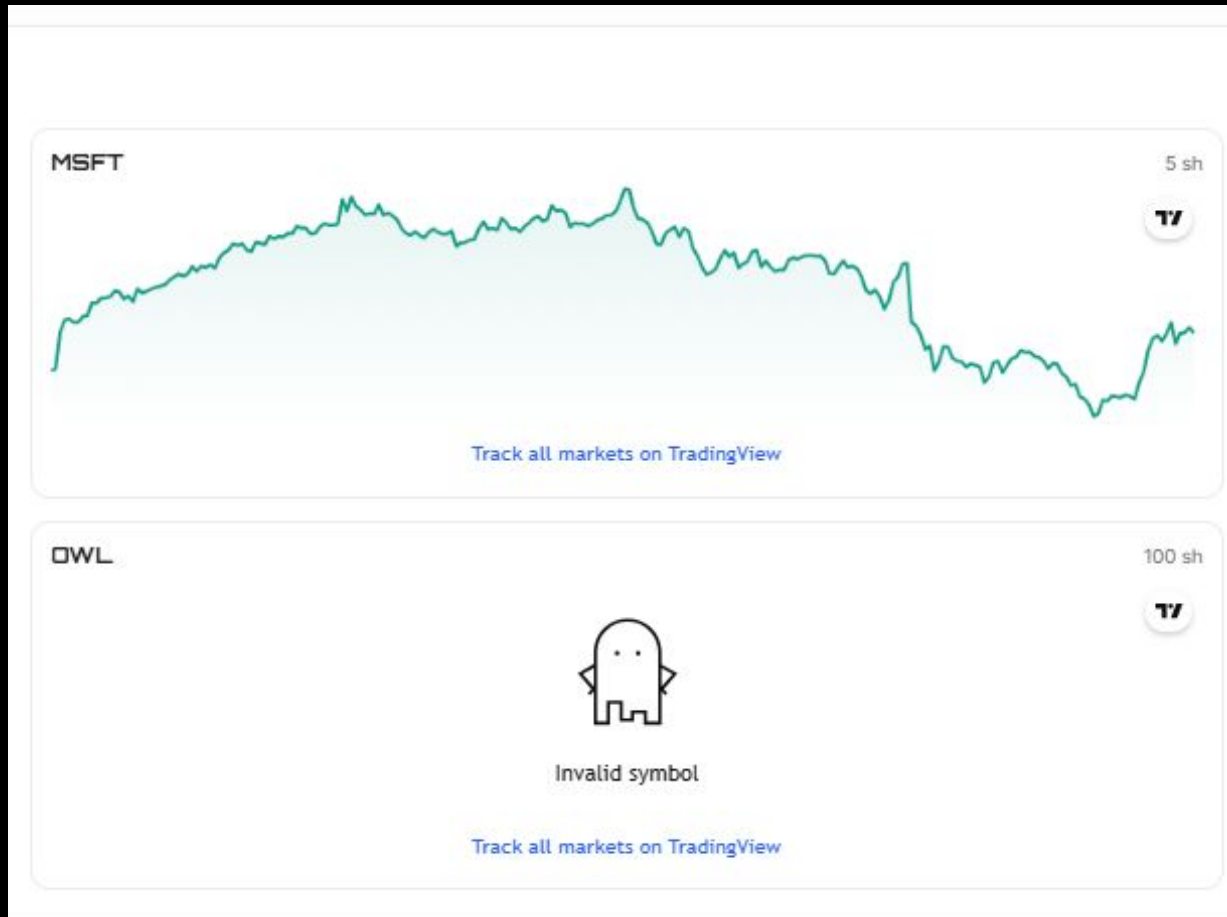
Imports



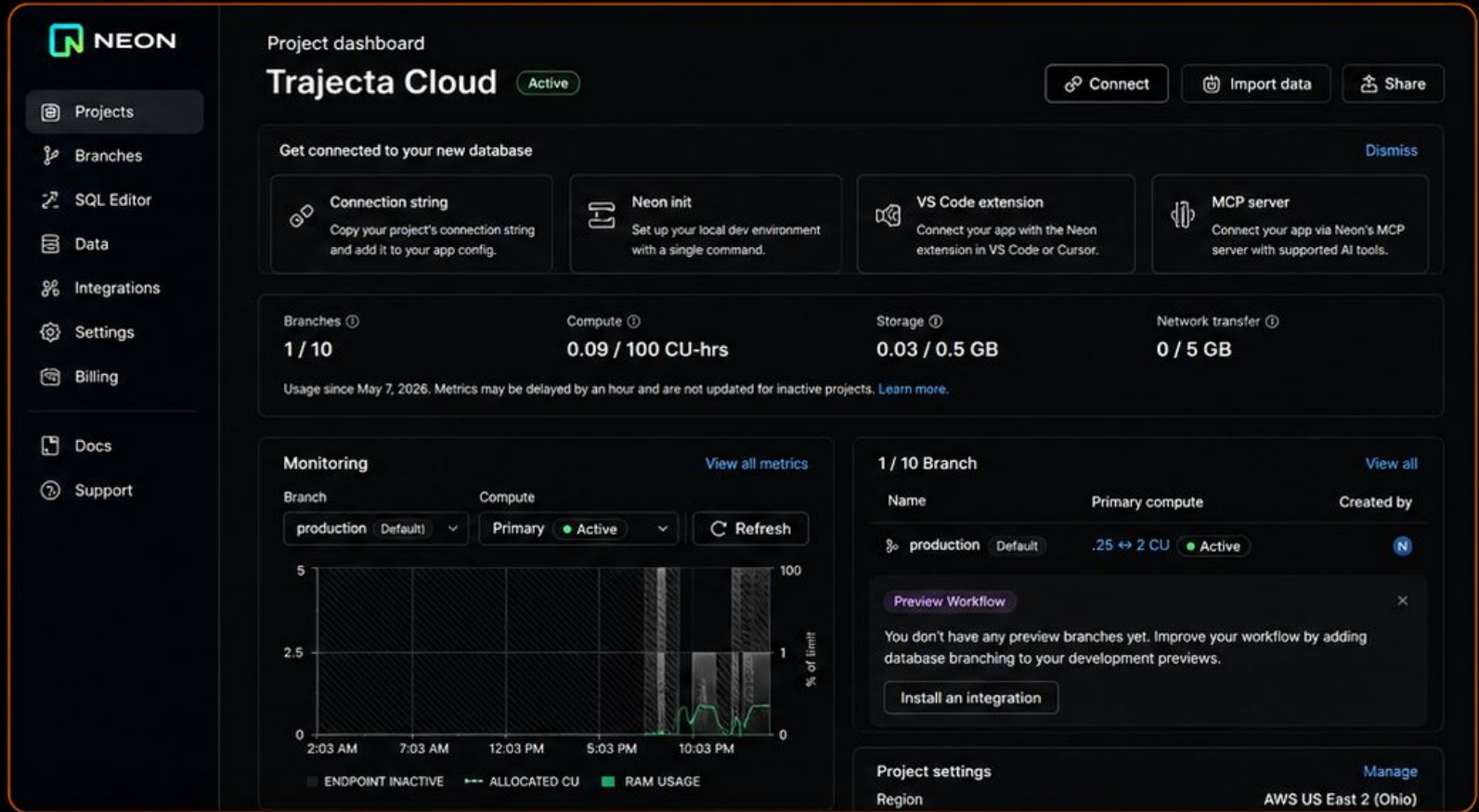
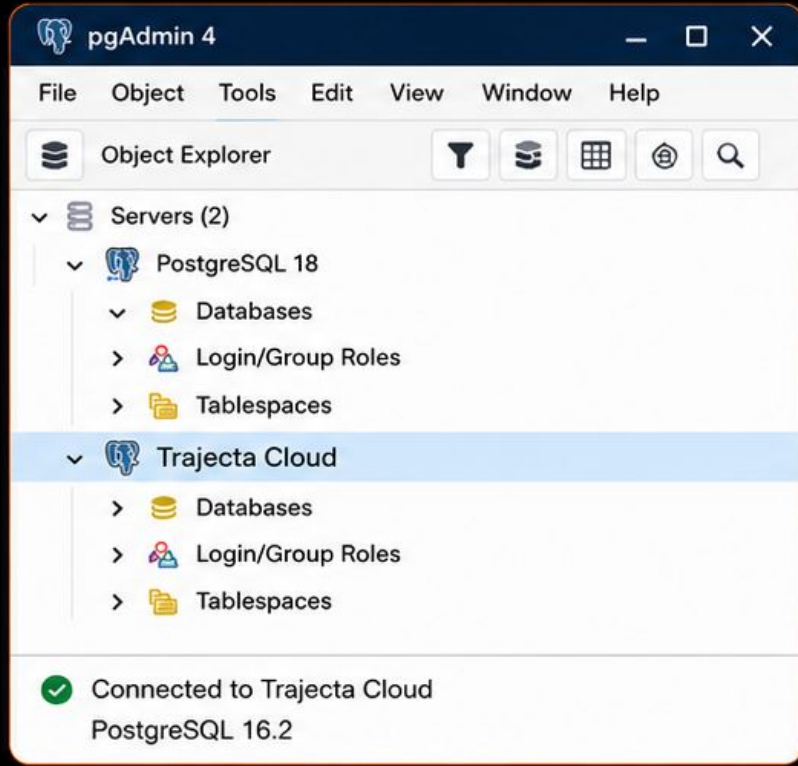
Exports



Early Challenges



Cloud Data



How the cloud database was created

- Created a PostgreSQL cloud project in Neon.tech
- Generated secure credentials and a connection string
- Added the Neon server to pgAdmin 4
- Validated the live connection from the local environment
- Enabled cloud-hosted storage for the Trajecta app



Result: Neon.tech is linked to pgAdmin4, allowing cloud database management and app persistence.

Schema Needs

- Enables secure account registration and persistent user login functionality
- Saves portfolio data and application state so users return exactly where they left off
- Supports scalable cloud database deployment using PostgreSQL and Neon
- Storage allows flexible saving of UI settings and analytics preferences
- Indexed tables improve query performance for portfolios, holdings, and sessions
- Automated timestamps track edits and improve data management workflows

Designed to support modular Shiny applications with user-specific analytics.

Schema Architecture

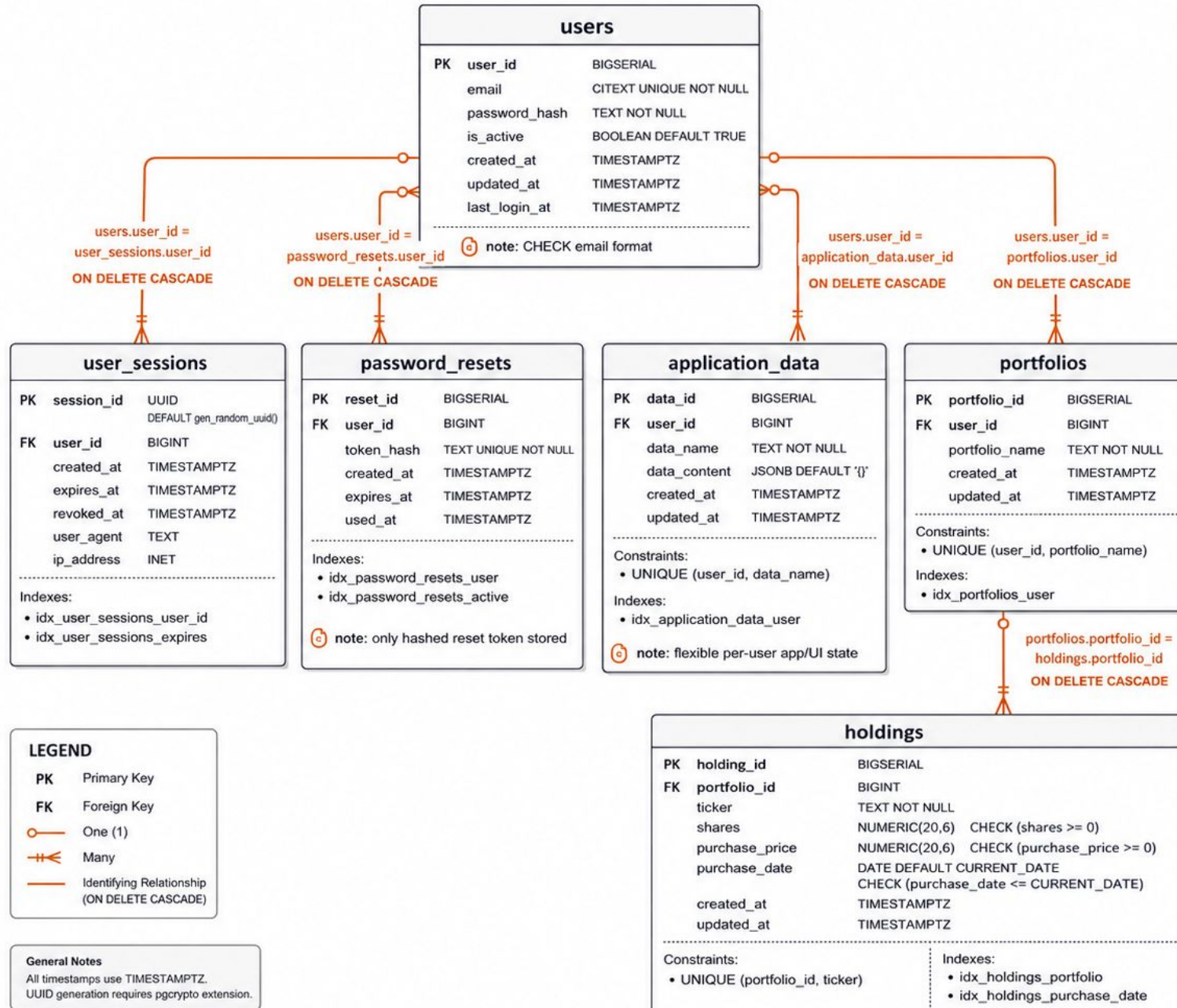
- Users table stores account credentials, login activity, and account status
- User Sessions table manages secure login sessions and authentication tracking
- Password Resets table supports secure password recovery workflows
- Application Data table stores user-specific saved app states and preferences
- Portfolios table links investment portfolios directly to individual users
- Holdings table stores securities, share counts, and purchase data for each portfolio

Core Relationship Structure:

Users → Portfolios → Holdings

Trajecta PostgreSQL Schema

Accounts, sessions, password recovery, saved app state, portfolios, and holdings



A) EXTENSIONS



- pgcrypto
- citext

note: used for gen_random_uuid() and case-insensitive email

B) TRIGGER FUNCTION



trg_set_updated_at()

note: automatically sets updated_at = NOW() before update

applies to:

- users
- application_data
- portfolios
- holdings

C) VIEW



v_latest_portfolio

definition summary:
most recently updated portfolio per user

fields:

- user_id
- portfolio_id
- portfolio_name
- updated_at

D) GRANTS



ALL TABLES in schema public:
SELECT, INSERT, UPDATE, DELETE to trajecta_app

ALL SEQUENCES in schema public:
USAGE, SELECT to trajecta_app

Shiny App
Link



Where are we now?

Retail or RIAs?



Questions?



WALL 55 ST

THANK YOU

Joseph Martinez

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