Epic 1: User Onboarding & Authentication

Goal: Allow users to create a secure account and get set up in the app with a virtual trading balance.

- **User Story HT-1:** As a new user, I want to sign up with my email and a password so that I can create a secure, personal account.
    - **Acceptance Criteria:** Must use a valid email format. Password must be at least 8 characters. User is redirected to dashboard on success.

- **User Story HT-2:** As a returning user, I want to log in with my email and password so that I can access my portfolio and trade history.
    - **Acceptance Criteria:** Shows error on incorrect credentials. Redirects to dashboard on success.

- **User Story HT-3:** As a logged-in user, I want to have a visible logout option so that I can securely end my session.
    - **Acceptance Criteria:** Logout button is always visible when logged in. Clicking it ends the session and returns to login page.

- **User Story HT-8:** As a user, I want to see a clear dashboard of all the stocks I currently own, including the quantity and current market value of each position.
    - **Acceptance Criteria:** Table shows Ticker, Quantity, and Current Value for each purchase. Separate purchases of the same stock are listed as distinct line items. Data updates in near real-time with market prices.

- **User Story HT-4:** As a new user, I want to receive a starting virtual cash balance upon signing up so that I can immediately start paper trading.
    - **Acceptance Criteria:** Balance is exactly $100,000. Balance is visible on the main dashboard.

Epic 2: Core Trading Simulation

Goal: Enable users to simulate buying and selling stocks based on real-time data and see their portfolio's performance.

- **User Story HT-5:** As a user, I want to search for a US stock by its ticker symbol so that I can view its current price.
    - **Acceptance Criteria:** Search works for valid US stock tickers. Displays current price upon finding a match.

- **User Story HT-6:** As a user, I want to execute a "buy" order for a specific quantity of a stock at the current market price so that I can add it to my virtual portfolio.
    - **Acceptance Criteria:** Trade fails if cash is insufficient. Portfolio holdings

are updated correctly. Cash balance is reduced by the correct amount.

- **User Story HT-7:** As a user, I want to execute a "sell" order for a specific quantity of a stock I own at the current market price so that I can realize my gains or losses.
  - ○ **Acceptance Criteria:** Trade fails if user doesn't own enough shares. Portfolio holdings are updated correctly. Cash balance is increased by the correct amount.

- **User Story HT-9:** As a user, I want my portfolio dashboard to show my total portfolio value and my overall unrealized profit or loss so I can track my performance.
  - ○ **Acceptance Criteria:** Total value is sum of cash and all holdings' current value. P/L is calculated correctly and color-coded (green/red).

- **User Story HT-15:** As a user, I want to see the current price and profit/loss for each individual purchase.
  - ○ **Acceptance Criteria:** Holdings table has columns for Purchase Price, Current Price, and P/L. P/L is calculated as (Current Price - Purchase Price) * Quantity. P/L is color-coded (green for profit, red for loss).

Epic 3: Trade Journaling & Reflection

Goal: Create the core feedback loop by prompting users to log the rationale behind their trades and review their decisions.

- **User Story HT-10:** As a user, I want to be automatically prompted to complete a journal entry immediately after I execute a trade so that the reasoning is fresh in my mind.
  - ○ **Acceptance Criteria:** Modal appears immediately after a successful trade. Modal blocks other actions until submitted.

- **User Story HT-11:** As a user completing a journal entry, I want to select from a list of common information sources (e.g., News, Social Media, Technical Analysis) so that I can categorize my decision-making process.
  - ○ **Acceptance Criteria:** Checkboxes for TA, FA, News, Social Media, Gut Feeling are present. User can select multiple sources.

- **User Story HT-12:** As a user completing a journal entry, I want a text box to write a free-form rationale explaining *why* I made the trade so that I can capture my specific thoughts.
  - ○ **Acceptance Criteria:** Text area accepts multi-line input. Input is saved with the trade record.

- **User Story HT-13:** As a user, I want to view a simple, chronological list of all my

past trades so that I can have a record of my activity.

- o **Acceptance Criteria:** List is separate from the main dashboard. Shows Ticker, Action, Quantity, and Date for each trade.

- **User Story HT-14:** As a user, I want to be able to click on any past trade in my history to view the detailed journal entry I wrote for it so that I can reflect on my past decisions.
    - o **Acceptance Criteria:** Clicking a trade in the history list opens its details. Details view shows the saved sources and rationale.