FinSight User Guide

Version 1.0 | *© 2025 FinSight Technologies*

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1. Introduction

Welcome to **FinSight**, your intelligent personal finance and portfolio management platform. This guide helps you navigate through every feature of the system—from signing up to managing your portfolios and gaining AI-driven investment insights.

FinSight is designed with simplicity, performance, and security in mind to make investment management accessible for everyone.

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2. Getting Started

2.1 Accessing the Platform

Visit the official FinSight web application and log in using your registered email and password.

2.2 System Requirements

- A modern web browser (Google Chrome, Edge, Firefox, Safari)
- Stable internet connection
- Optional: CSV reader (for downloaded reports)

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3. User & Authentication Features

3.1 User Registration

Create a new account by providing your name, email, and password. Verification may be required for activation.

3.2 User Login

Enter your registered email and password to access your account securely.

3.3 Password Reset

If you forget your password, click *“Forgot Password”* to receive a secure password reset link via email.

3.4 User Logout

Securely log out from the platform to protect your session and data.

3.5 Profile Update

Edit your personal details like name, display picture, and preferred currency from your profile page.

3.6 User Guide

You can access this downloadable user manual anytime from the navigation bar under *Help → User Guide.*

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4. Portfolio Management

4.1 Portfolio Creation

Easily create a new portfolio by defining its name, investment type, and base currency.

4.2 Edit / Delete / View Portfolio

Manage your portfolios in one place—rename, delete, or open detailed views to track performance and holdings.

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5. Transactions

5.1 Add / Update / Delete / View Transactions

Record your stock purchases, sales, or dividends. Update or delete any entry as needed.

5.2 Filter Transactions

Apply filters by stock symbol, date range, or transaction type for quick searches.

5.3 Download Transaction History (CSV)

Export your full or filtered transaction history in CSV format for offline analysis.

5.4 Transaction Notes

Attach notes or descriptions to each transaction for easy reference.

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6. Holdings & Analytics

6.1 Auto Holdings Calculation

FinSight automatically computes your holdings based on your transaction data—no manual input required.

6.2 Real-Time Profit and Loss

Monitor real-time gains or losses using live market prices and average purchase cost.

6.3 Portfolio Diversification Chart (Pie)

Visualize your portfolio's asset distribution via an interactive pie chart.

6.4 Top 5 Holdings Widget

Quickly view your largest holdings summarized on your dashboard.

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7. Stock Prices & Caching

7.1 Fetch Live Stock Prices

Get up-to-date market prices for listed stocks directly within your dashboard.

7.2 Cache Stock Prices

Cached data ensures faster loading and consistent availability even with limited internet connectivity.

7.3 Auto Cache Refresh

Prices are refreshed automatically at predefined intervals for accuracy.

7.4 Show Last Updated Time

Each stock list displays when the data was last refreshed for transparency.

7.5 Favorite Stocks

Mark frequently tracked stocks as favorites for quicker access.

7.6 Currency Selection

Choose your preferred display currency for a unified portfolio view.

7.7 Highlight Top Gainer / Loser

Instantly identify top-performing and underperforming assets in your portfolio.

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8. AI Insights & Reports

8.1 AI Portfolio Summary (Downloadable)

Generate a detailed, AI-driven portfolio summary highlighting key insights and performance indicators. Downloadable as a PDF report.

8.2 AI Investment Tips

Receive automated, data-backed investment suggestions tailored to your portfolio trends.

8.3 Performance Line Chart

Track portfolio performance over time using an interactive line chart with real-time data integration.

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9. Security & Privacy

FinSight implements robust security mechanisms including encrypted connections (HTTPS), password hashing, and strict session management to safeguard your data.

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10. Support

If you encounter any issues, contact our support team at **support@finsight.com** or use the in-app *Help* section.

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11. Version History

- **v1.0 (2025)** – Initial release with full feature suite and AI integration.

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12. Legal Notice

All financial data and analytics provided by FinSight are for informational purposes only. FinSight does not provide financial advice.

End of User Guide

Thank you for choosing FinSight — empowering smarter investment decisions.