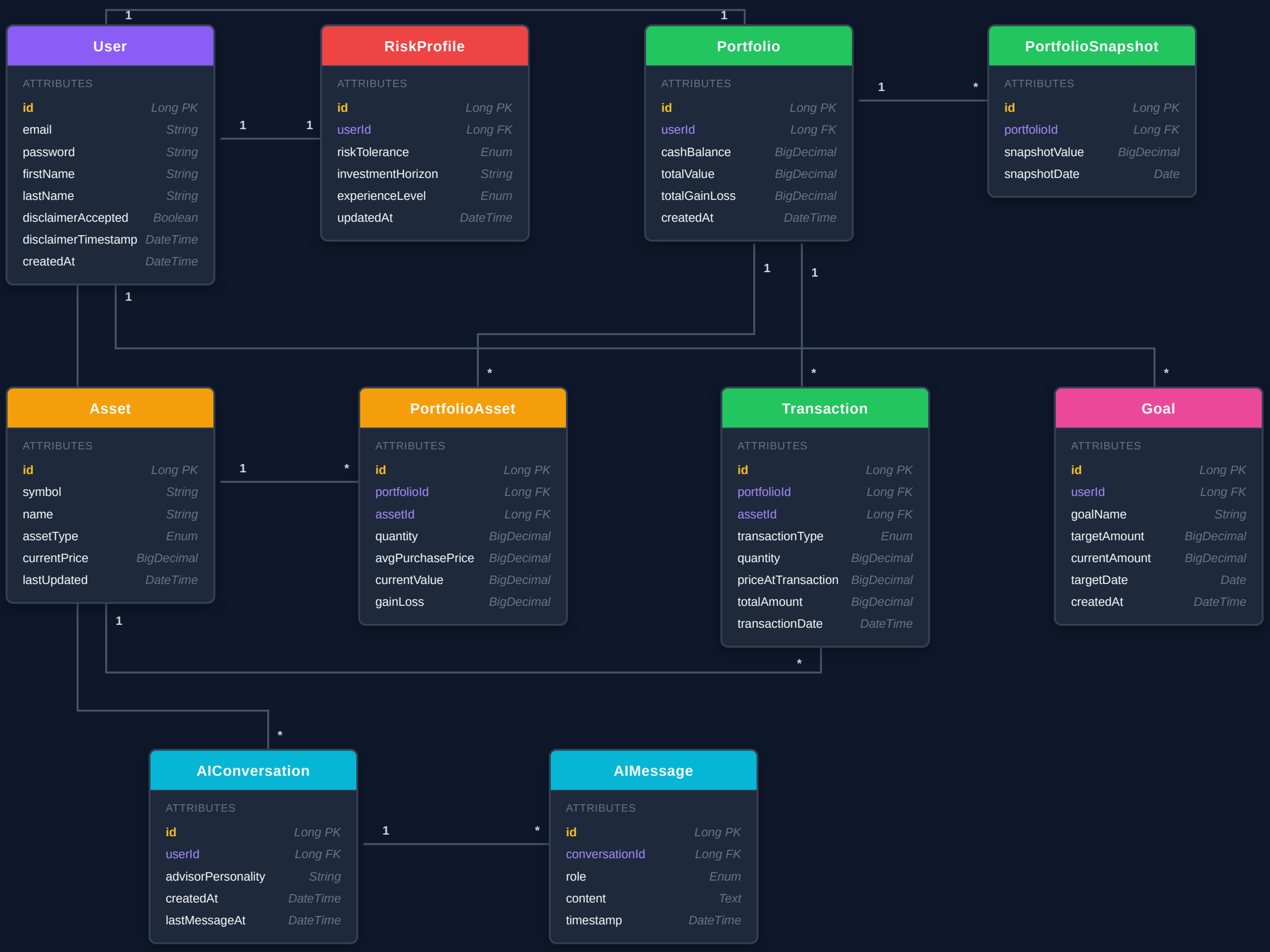
InvestEd — Data Model / ERD

Investment Learning Platform - Entity Relationship Diagram



Legend

User Domain · Risk Profile · Portfolio Domain · Asset Domain · Goal Domain · AI Domain · `PK` Primary Key · `FK` Foreign Key · `1 – *` One-to-Many · `1 – 1` One-to-One

Relationship Notes

- → **User → RiskProfile:** One-to-One — Each user has one risk profile
- → **User → Portfolio:** One-to-One — Each user has one portfolio with paper money
- → **User → Goal:** One-to-Many — Users can set multiple financial goals
- → **User → AIConversation:** One-to-Many — Users can have multiple AI chat sessions
- → **Portfolio → PortfolioAsset:** One-to-Many — Portfolio contains multiple positions
- → **Portfolio → Transaction:** One-to-Many — Portfolio tracks all buy/sell transactions
- → **Portfolio → PortfolioSnapshot:** One-to-Many — Daily snapshots for historical tracking
- → **Asset → PortfolioAsset:** One-to-Many — Same asset can be in multiple portfolios
- → **Asset → Transaction:** One-to-Many — Asset referenced in multiple transactions
- → **AIConversation → AIMessage:** One-to-Many — Conversation contains multiple messages

Enum Definitions

- → **AssetType:** STOCK, CRYPTO
- → **TransactionType:** BUY, SELL
- → **RiskTolerance:** CONSERVATIVE, MODERATE, AGGRESSIVE
- → **ExperienceLevel:** BEGINNER, INTERMEDIATE, ADVANCED
- → **MessageRole:** USER, ASSISTANT