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Project 2 Milestone

Abstract: Brief description of work

To date, I have been working on individual functions that will all come together to develop my stock market application. Some of the functions I have completed or I am still fixing are a function to read a line of a file to get holding (Ticker and Quantity), a function to get price for Ticker, a function to value holding (Quantity x Price) and a function to generate the total value of the portfolio. All of these individual functions will be put together within the same main class or possible be given a class of their own. The point to all of this work being down is to be able to help people calculate the total value of their personal investment portfolios.

Future Work: Work still need to be started or finished

The work that needs to be completed still mainly involves compressing all the functions and classes together. There needs to a decision on whether or not everything should just be a function within the main class or have another class for larger more complicated function. Another piece of work that needs to be done is to create the while loop that will continue to calculate and store the data made throughout the program. This loop will need to continue till the last ticker in the portfolio is calculated and saved. Once everything is decided upon and put together the application should be ready to be debugged. After debugging the application with hopefully be ready for use!

Introduction: Describes the motivation of the work and provides an outline of the paper

The motivation behind all of this work is based on helping people with managing their stock market portfolios. As stated above, the main goal of the application will to be able to help people calculate the total value of their personal investment portfolios.

Detailed System Description: Describes what the system does and how specific users interact with it. It also describes how classes interact (in UML).

In an overall view, the application will be gathering data from a person's portfolio text file and also grabbing data from the internet. After doing so, the application will have all the data needed to calculate total values of each Ticker by itself and all together as a whole portfolio.

Main
-ticker: String -quantity: int -price: int -holding: String
+readPortFile(ticker, quantity) +readPrice(price) +getTicker(holding) +getQuantity(holding)

+getIndividualValue(ticker, quantity, price) +getPortValue(getIndividualValue)

*UML diagram above is a rough draft due to not having full code done yet.

Requirements: Describes what the specific details of the problem that the system is addressing.

A lot of people, including myself, have always laid out their investments on just an excel sheet and then hand calculated the total value of their portfolio. No one wants to plug in a bunch of sock tickers, number of shares and prices to watch what is happening to their investment.

Literature Survey: Describes other work that has been done to address the same or similar problems.

Currently sites on the internet such as fidelity, yahoo finance, and google finance have addresses the same problem. These sites allow anyone to save their stocks and watch their share values rise and fall. Some people feel as though these applications are not safe enough and or don't want to plug in all their stocks. Therefore, it seems as though my stock market application could be another route for some people.

User Manual: Briefly describes how the system should be used.

This application should be straight forward and easy to use by anyone. The user will first make sure they have a portfolio text file that lists all the tickers of the stocks they own and how many shares they own of each. Once that file has been created, the user will be able to plug their file into the application and it will do its job. The application will take the text file and pull out individual tickers and shares and match them each. Then the application will use its calculate function to calculate the total amount for each individual stock. Once the application has each value of the individual stock it will then put them all together to show the total value of the whole portfolio. In the end, the user only has to make sure their text file for their portfolio is correct and is connected to the application. Everything else is done for them.

Conclusion: Summarizes the goals accomplished by the system.

As stated earlier in this milestone report, the main goal is to make the process of calculating one's portfolio values easier and faster. So far, the work that has been completed has not accomplished this goal but has started the strides towards finishing it.

References/Bibliography:

The only reference that was consulted so far during the project has been the help of my father Tim Kelly and my brother Sam Kelly. One source that will be used later in the work process with the use of either Yahoo or Google Finance.