## 1.1 Introduction of the proposed project

The proposed project, "Portfolio Management System" is a comprehensive tool designed to assist users in efficiently managing their stock portfolios. In the evolving financial markets, investors and traders need reliable tools to track and manage their investments. This system provides users with a platform to monitor their stock holdings, assess their portfolio's performance, and make informed investment decisions.The main focus of the so designed system is to manage your trades, fund and most importantly track your trade and investment records and returns over time. The project will include essential features like form validation, email verification, and CRUD (Create, Read, Update, Delete) operations, ensuring a secure and user-friendly experience.

### 1.2 Problem statement

-Lack of user-friendly portfolio tracker
-Traditional methods like Excel is outdated
-Complexity in managing your portfolio through other methods

### 1.3 Objective

-To develop a smart portfolio management system that allows users to efficiently manage their stock portfolios with real-time tracking and analysis.
-To implement form validation and email verification features to ensure data accuracy and enhance system security.
-To enable CRUD operations, allowing users to create, read, update, and delete their portfolio data seamlessly.

### 1.4 Scope and limitations

**Scope**

-User friendly interface for managing portfolios
-Save time
-Directly read the csv file from mero share
- Generation of reports and visualizations of the portfolio performance.
-Flexible for Individual and institutional investors

**Limitations**

-The system will not include integration with live stock market feeds; users will need to manually input stock prices and other relevant data.
-The system will not provide financial advice or predictions;Stock price prediction

and buy sell setup
-Can't fetch data directly form your broker's stataement.

## 5.Methodology

// Diagram and little bit of explanation

### a.Requirement Identification

#### -Studty of the existing system

To ensure that the Smart Portfolio Management System addresses current gaps and enhances user experience, an analysis of existing portfolio management tools was conducted. The study focused on widely-used systems that offer features such as portfolio tracking, stock analysis, and performance visualization.

The analysis revealed that while many existing tools provide basic functionalities, they often lack integration of critical features such as robust form validation and email verification. Additionally, many systems have complex user interfaces, making them difficult for non-expert users to navigate.

The findings from this study highlighted the need for a more intuitive, secure, and feature-rich solution. The Portfolio Management System aims to fill these gaps by providing a user-friendly interface, comprehensive form validation, and email verification . The system will also streamline CRUD operations, ensuring that users can manage their portfolios efficiently without encountering the complexities seen in other tools.

#### -Requirement colllection

**a)Functional requirements**

CRUD Operations: The system must support Create, Read, Update, and Delete operations for portfolio data, allowing users to manage their investments seamlessly.

Real-Time Tracking: Users should be able to input and update stock prices manually, with the system providing real-time performance tracking and analysis of their portfolio.

Data Validation: Form validation is essential to ensure that all data entered by users is accurate and complete, reducing the risk of errors.

Email Verification: To enhance security, the system must include email verification during user registration and when significant changes are made to the portfolio.

**b) Non-functional requirement**
Avaibility
Security
Performance
Relaibility

**b. Feasibility Study**
Technical Feasibility:
The project will use widely-supported technologies like HTML, CSS, JavaScript for the front-end, and Php with a MySQL database for the back-end. These technologies are well-suited for developing a web-based portfolio management system, ensuring compatibility and scalability.

Operational Feasibility:
The system is designed to be user-friendly, requiring minimal training for users to manage their portfolios. With its intuitive interface and essential features, the system can be easily adopted by both novice and experienced investors.

Economic Feasibility:
The project is cost-effective, utilizing open-source tools and frameworks for development. The expected benefits, including improved portfolio management efficiency and user satisfaction, outweigh the initial development costs, making the system a viable investment.

**c. Tools**
Analysis and Design Tools:

UML Diagrams: Used for modeling the system's structure and processes.

Wireframes: Created to design and visualize the user interface.
Implementation Tools:

Front-End: HTML, CSS, JavaScript.
Back-End: Python, MySQL.
Version Control: Git for managing and tracking code changes.

## 6.High-level Design of the proposed system

//design

## 7.Grantt chart to show the projected time planning

//chart

## 8. Expected Outcome

After the completion of the  Project it will provide users with a streamlined, intuitive platform for managing their stock portfolios. It will offer seamless CRUD operations, real-time tracking, and robust security features like form validation and email verification. With its user-friendly interface and insightful reports, the system will empower investors to make informed decisions confidently, setting a new benchmark for efficiency and reliability in portfolio management.

## 9.References