**User Requirements**

1. The application must track and display investments of the client
2. The client would like software to be able to view the total value of their personal investments (i.e. cash in the bank plus value of all shares) at any given date within the last 3 years
3. At any one time the client may hold any number of shares in up to 5 different companies, plus a given amount of cash in their bank.

Note that the value of shares varies over time…

1. The client would like to see the total value held at any given time, preferably in a graphical (and also optionally a tabular) format.

\*\*If it proves possible to take this project further, then the client would also be interested in:  
1.  Being able to simulate the answers to questions such as "What if I'd have sold all my Netflix shares 6 months ago and transferred them into Microsoft Shares"?    
2.  Show market trends, e.g. show trend indicators such as a [moving average](https://en.wikipedia.org/wiki/Moving_average) or any of the so-called "technical analysis" indicators (e.g. <https://www.investopedia.com/university/technical/techanalysis10.asp>)  
3.  Test some basic automated trading algorithms that you may devise, such as those based on [moving-average-crossover](https://en.wikipedia.org/wiki/Moving_average_crossover), or those based on technical-analysis indicators.

4. As an optional extra, the client would be interested if you could apply any extra analysis tools, graphing, generating reports, and performing market simulations for "what if" scenarios.

\*\*https://moodle.essex.ac.uk/mod/book/view.php?id=451179 – Link to CE291 Group Project Overview – Financial Portfolio Manager.