





Portfolio Manager Project – Simple Version for Students

What Is This Project About?

Your team will create an **application to manage a financial portfolio**.

This means you will **store and manage data about money and investments**, like:

-  Cash
-  Stocks
-  Bonds
-  Other assets



You will build:

1. A **backend API** using Node.js + Express (first step)
2. A **frontend interface** (later in the project)

Main Goal

Your **main task** is to build a **Portfolio Manager REST API**.

The API should allow:

-  Saving investment records (e.g., add a stock)
-  Getting all portfolio records (e.g., show everything)

☐ What Is a REST API?

It's just a set of web links (endpoints) that:

- Accept data (using POST)
- Send back data (using GET)
- Delete or update data (using DELETE or PUT)

Example Features

Later, when you build the frontend, the user should be able to:

1. 👁️ ☐ View all portfolio items
 2. 📊 See how the portfolio is performing (charts if possible)
 3. ➕ Add new investments
 4. — Delete/remove investments
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🚫 You Don't Need

- ✕ Login or user management
 - ✕ Multiple users — Just assume **one person using the app**
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🔧 ☐ Step-by-Step What to Do

🔧 Technical Checklist

1. ✔️ Create your project folder structure
2. ✔️ Create a GitHub repository and share it with your team
3. ✔️ Add and push your first code files
4. ✔️ Make sure every team member can access and pull/push code
5. ✔️ Design a **very simple data model** — start with:

```
{
  id: 1,
  stockTicker: "AAPL",
  volume: 10
}
```

6. ✔️ Write your first backend APIs:
 - GET /portfolio → get all items
 - POST /portfolio → add a new item
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👥 Project Management Checklist

1. 💬 Discuss as a team:
 - Who will work on backend?
 - Who will work on frontend?
 - Who will test or document?
2. ✔️ Make a task list (you can use Trello if you know how)

3. ☐ Start building **small working parts first**
4. ☒ Don't try to build everything at once — **keep it simple**
5. ☐ When the instructor comes, show your progress and ask questions
6. ☒ Agree on what data you will store (e.g., stocks, cash, bonds)