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INSTITUTE OF MANAGEMENT & CAREER COURSES (IMCC) (AUTONOMOUS)

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Ref. No.: MES IMCC/237/2025-26

Date: 26/12/2025

CERTIFICATE

This is to certify that the Project entitled **“MonthVest”** is completed by **“Shrushti Mangalekar”** of M.C.A. Semester I for the Academic Year 2025-26 at Maharashtra Education Society's Institute of Management & Career Courses (IMCC), Pune - 411038.

To the best of our knowledge, this is an original study done by the said student and important sources used by her have been duly acknowledged in this report.

The report is submitted as a part of course ITP11 Mini Project for the Academic Year 2025-26 as per the rules and guidelines prescribed by the institute.

Dr. Shilpa Parlikar
Project Coordinator

Ms. Manasi Shirurkar
Program Coordinator

Dr. Ravikant Zirmite
Head, Dept. Of MCA



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1. Project Scope

1.1 Title

MonthVest – Smart Monthly Investment Analyzer

Overview:

MonthVest – Smart Monthly Investment Analyzer is a web-based personal investment management system designed to help users track and manage their financial investments efficiently. The platform allows users to record investment details across multiple instruments such as Gold, Stocks, Mutual Funds, and Fixed Deposits in a single centralized system.

The system provides an interactive dashboard that displays total invested amount, current value, profit or loss, and live stock prices fetched using the Yahoo Finance API. MonthVest also offers monthly performance insights to help users understand portfolio growth over time. Additionally, the system provides personalized investment suggestions based on user categories such as Student, Adult, Senior Citizen, and Women, supporting structured and informed financial planning.

Project Objectives:

1. To develop a web-based investment portfolio management system.
2. To provide secure user registration and login functionality.
3. To enable users to add and manage investments and stock details.
4. To fetch and display live stock prices using the Yahoo Finance API.
5. To track and analyze monthly investment performance.
6. To store and manage user and investment data efficiently using a relational database.

User Roles & Responsibilities

1. Account Security & Integrity
2. Accurate Investment Data Entry
3. Portfolio Monitoring & Updates
4. Responsible of Investment Suggestions
5. Compliance with System Guidelines



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Core Features:

1. Authentication & User Profiles

- Secure user registration and login
- Personalized user profiles with category selection

2. Investment Management System

- Add, edit, and delete investments
- Support for multiple investment types (Stocks, Mutual Funds, FD)

3. Intelligent Dashboard

- Automated calculation of:
 - Total invested amount
 - Current value
 - Profit / Loss
- Visual representation using charts and summaries

4. Live Stock Tracking

- Fetches real-time stock prices for added stocks using the Yahoo Finance API

5. Monthly Performance Tracking

- Month-wise profit and loss insights
- Identification of best and low-performing investment categories

6. Personalized Investment Suggestions

- Recommendations based on user category:
 - Student
 - Adult
 - Senior Citizen
- Helps optimize investment strategy and returns

7. Reports & Data Insights

- Summary reports of investment performance
- Downloadable data for future reference



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Technology Stack:

- **Frontend:**
 - **HTML5:** Structures the dashboard, sidebar, and chart sections.
 - **CSS3:** Styles the layout and adds responsive design and effects.
 - **JavaScript (Vanilla JS):** Handles dynamic content, calculations, and DOM updates.
 - **Chart.js:** Displays interactive charts for investments.
 - **Font Awesome:** Provides icons for sidebar and UI elements.
- **Backend:**
 - **Python:** Runtime language for backend logic, calculations, and data processing.
 - **Flask:** Framework to handle API routes, HTTP requests, and business logic.
 - **Yahoo Finance API:** Used to fetch real-time stock and market data for portfolio updates.
- **Database:**
 - **SQLite:** Relational database to store users, investment records, and transaction history.
- **Tools:**
 - **Postman:** For testing and debugging APIs (including Yahoo Finance endpoints).
 - **Git/GitHub:** For version control and project management.



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Database Schema Overview:

The application utilizes a relational database schema implemented in SQLite. The schema is designed to separate user authentication data from investment data while maintaining referential integrity through proper foreign key relationships.

Table: user

- **Purpose:** Stores registered user credentials and profile information, including name, email, and user category (Student, Adult, Senior Citizen, Women) for authentication and personalization.

Table: investment

- **Purpose:** Stores all investment records for users, including investment type (Stocks, Mutual Funds, FD, SIP, Insurance), invested amount, current value, duration, and start date.

Table: stock

- **Purpose:** Stores stock investment records, including user ID, stock symbol, quantity, and buy price for tracking individual stock investments.

Relationships: Each user can have multiple investments (1-to-many relationship). Each investment belongs to a category (many-to-1 relationship). Transaction history is linked to user and investment for detailed tracking.



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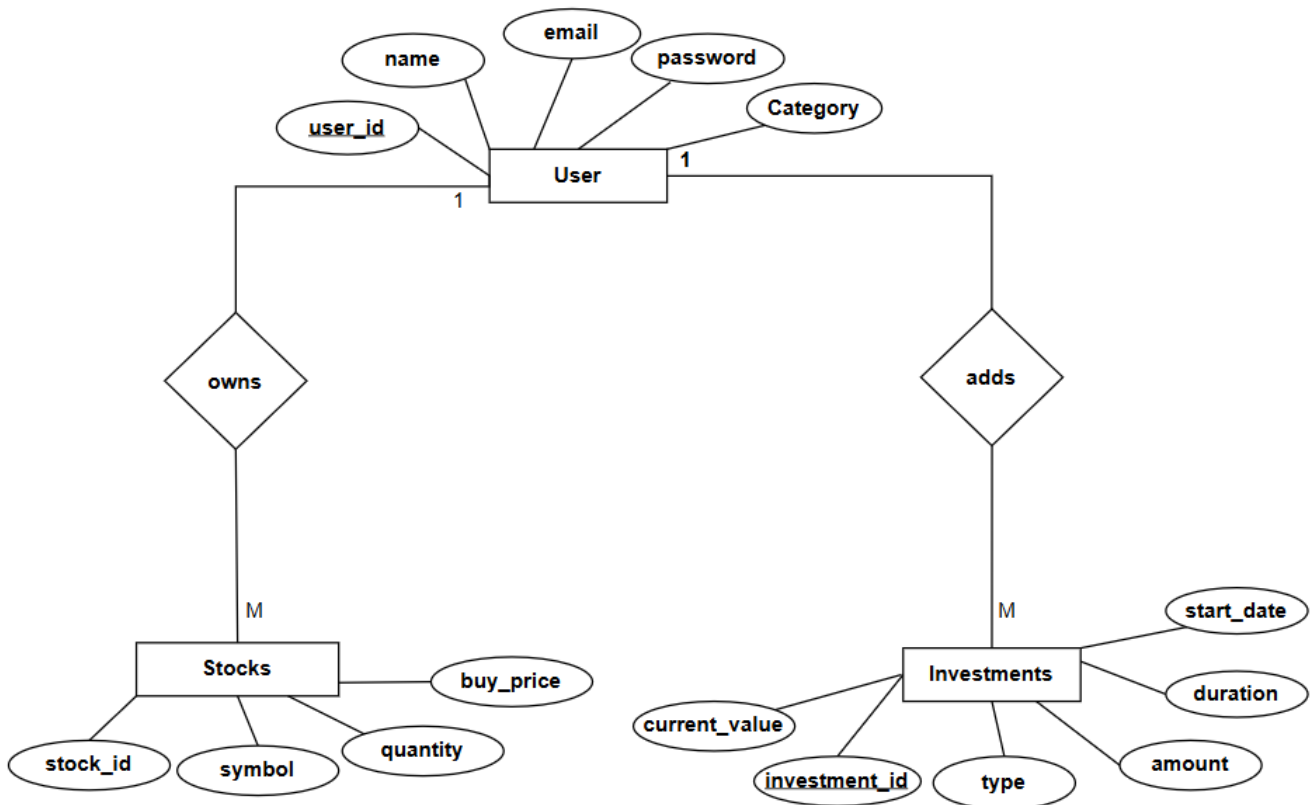
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2 UML Diagram

2.1 ERD





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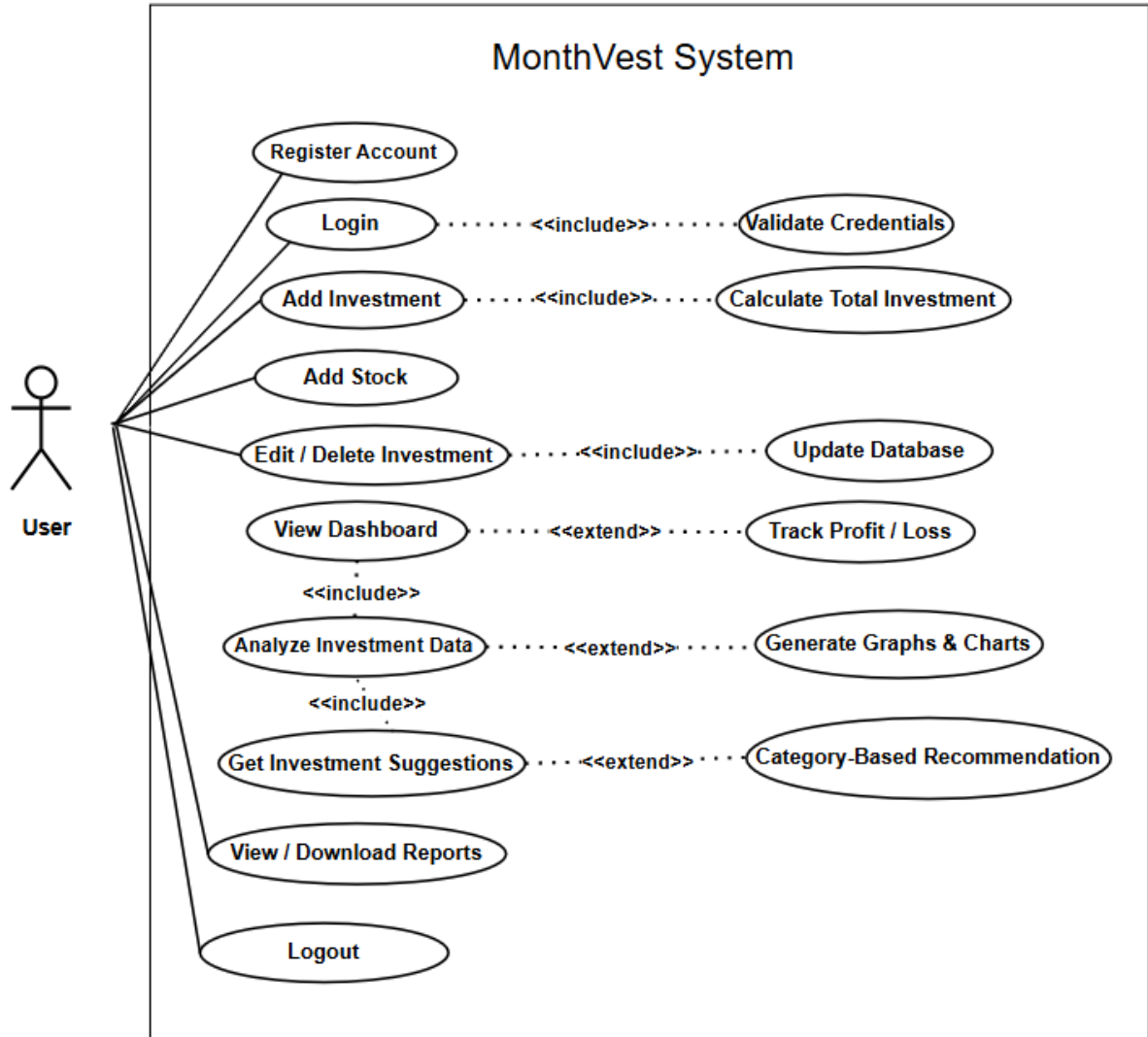
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2.2 Use Case Diagram





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2.3 Data Dictionary

1. User Table

Column Name	Data Type	Constraints	Description
User_id	INT	PRIMARY KEY	Unique ID for each user
User_Name	VARCHAR	NOT NULL	Full name of the user
Email	VARCHAR	UNIQUE, NOT NULL	User's email address
Password	VARCHAR	NOT NULL	Encrypted password for authentication
Category	VARCHAR	NOT NULL	Student / Adult / Senior / Women

2. Investment Table

Column Name	Data Type	Constraints	Description
Investment_id	INT	PRIMARY KEY	Unique investment ID
User_id	INT	FOREIGN KEY, NOT NULL	Reference to user
Type	VARCHAR	NOT NULL	Investment type
Amount	FLOAT	NOT NULL	Invested amount
Current_value	FLOAT	NOT NULL	Current market value
Start_date	DATE	NOT NULL	Investment start date
Duration	INT	NOT NULL	Investment duration



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3. Stock Table

Column Name	Data Type	Constraints	Description
Stock_symbol	VARCHAR	NULL	Stock symbol (e.g.,TCS.NS)
Quantity	INT	NULL	Total shares bought
Buy_price	FLOAT	NULL	Purchase price per share



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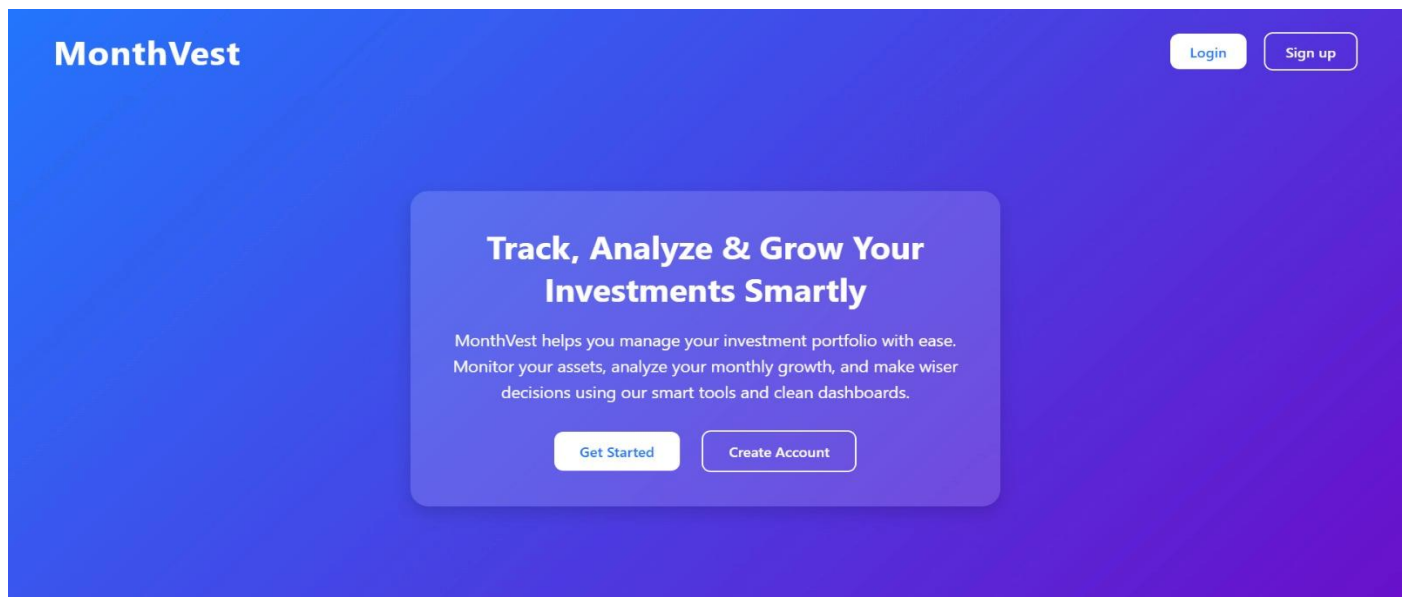
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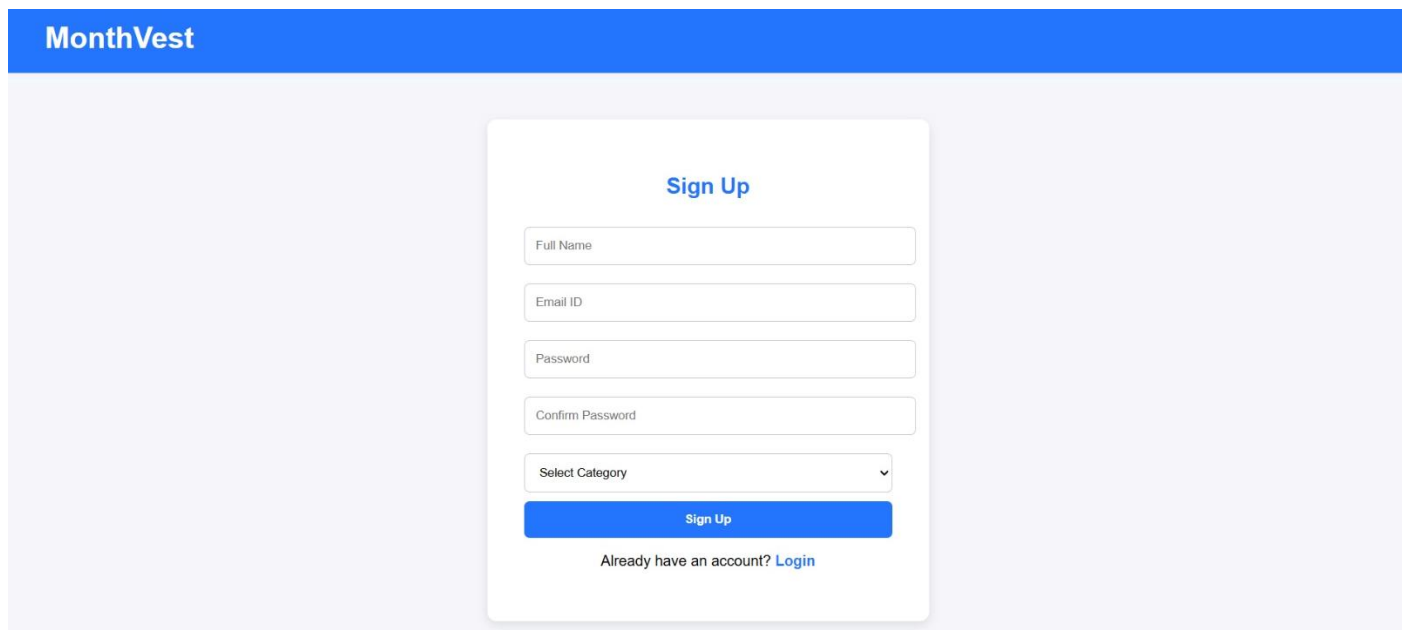
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2.4 Sample Input and Output Screens

1 Home Page:



2 Sign Up Page





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3 Login Page

MonthVest

Login

Email ID

Password

Login

Don't have an account? [Sign up](#)

4 Dashboard Page

Dashboard

+ Add Investment

Add Stock

Edit / Delete

Portfolio Trends

Investment Tips

Reports

User Profile

Logout

Welcome, Sumit Sharma

Total Investment

₹86800.0

Current Value

₹106928.3

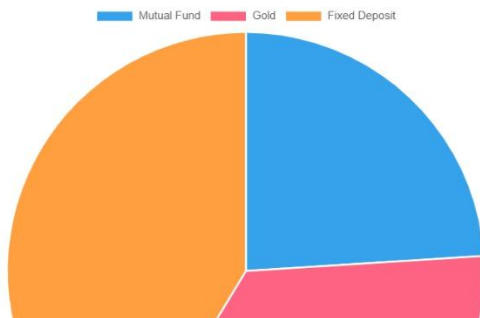
Total Profit / Loss

₹20128.3

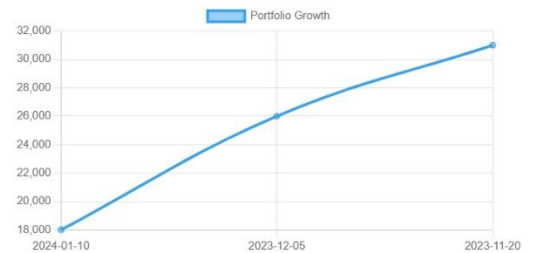
ROI

23.19%

Investment Distribution



Portfolio Growth





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Your Live Stocks

Company	Buy Price	Live Price	Quantity	Result
TCS	₹1200.0	₹3280.000	7	₹14560.0 profit
INFY	₹1200.0	₹1656.100	2	₹912.2 profit
INFY	₹1000.0	₹1656.100	1	₹656.1 profit

Your Investments

Type	Amount	Current Value	Date
Mutual Fund	₹18000.0	₹16800.0	2024-01-10
Gold	₹26000.0	₹28900.0	2023-12-05
Fixed Deposit	₹31000.0	₹33300.0	2023-11-20

5 Add Investment Page

Add New Investment

Investment Type *

Select Type

Invested Amount *

Start Date *

dd - mm - yyyy

Current Value *

Duration (Years) *

Tenure (Months) *

Expected Return Rate (%) *



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6 Add Stock Page

Add Stock

Stock Symbol

e.g. TCS.NS

Quantity

Buy Price (₹)

Add Stock



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7 Edit / Delete Investment Page

Edit/Delete Investments

Search by investment type.

All Types

Investment Type	Amount	Current Value	Start Date	ROI %	Actions
Mutual Fund	\$18000.00	\$16800.00	2024-01-10	-6.67%	Edit Delete
Gold	\$26000.00	\$28900.00	2023-12-05	11.15%	Edit Delete
Fixed Deposit	\$31000.00	\$33300.00	2023-11-20	7.42%	Edit Delete

8 Monthly Performance Page

Portfolio Trends

Best Performing

Gold (2900)

Worst Performing

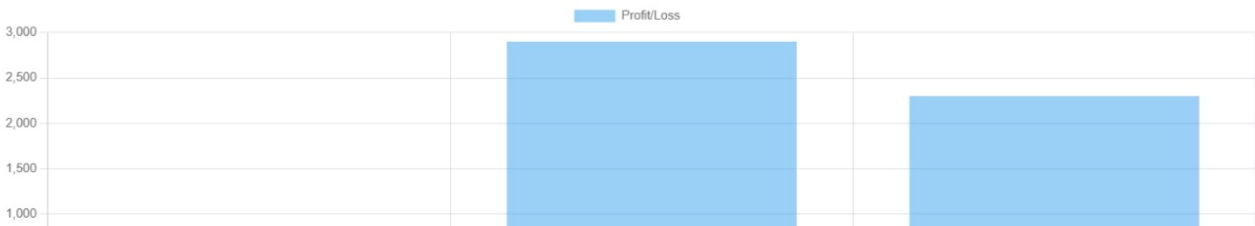
Mutual Fund (-1200)

Total Invested

75000

Total Returns

4000





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9 Investment Suggestions Page

Investment Suggestions

Personalized Suggestions Based on Your Portfolio

- Start investing to get personalized suggestions.

Portfolio Risk Level: **Low**

Portfolio Risk Distribution

10 Reports

Financial Reports

Download CSV

Download PDF

Total Investment (Stocks + Others)

₹86800.00

Category Distribution

Category	Total Amount
Mutual Fund	₹18000.00
Gold	₹26000.00
Fixed Deposit	₹31000.00



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Profit / Loss Summary

Category	Profit / Loss
Mutual Fund	₹-1200.00
Gold	₹2900.00
Fixed Deposit	₹2300.00

Stock Report

Stock	Buy	Qty	Live	Invested	Current	P/L
TCS	₹1200	7	₹3280	₹8400	₹22960	₹14560
INFY	₹1200	2	₹1656.1	₹2400	₹3312.2	₹912.2
INFY	₹1000	1	₹1656.1	₹1000	₹1656.1	₹656.1

11 User Profile Page

User Profile



Click to change avatar

Full Name

Sumit Sharma

Email

sumit@example.com

Age

30

Gender

Male

Category

Adult

Save Changes

Cancel



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- Sample user data stored in the database showing name, email, password, and category.

	id	fullname	email	password	category
	Fil...	Filter	Filter	Filter	Filter
1	1	Sumit Sharma	sumit@gmail.com	script:...	Student
2	2	Anita Verma	anita@gmail.com	script:...	Student
3	3	Rohit Mehra	rohit@gmail.com	script:...	Student
4	4	Neha Gupta	neha@gmail.com	script:...	Student
5	5	Aman Singh	aman@gmail.com	script:...	Student
6	6	Priya Nair	priya@gmail.com	script:...	Adult
7	7	Karan Patel	karan@gmail.com	script:...	Adult
8	8	Sneha Kapoor	sneha@gmail.com	script:...	Adult
9	9	Vikas Yadav	vikas@gmail.com	script:...	Adult
10	10	Meera Joshi	meera@gmail.com	script:...	Adult

- Sample investment records showing investment type, amount, start date, current value, duration, expected rate, and user ID.

	id	investment_type	amount	start_date	current_value	duration_years	tenure_months	expected_rate	notes	user_id
	Fil...	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
1	1	Mutual Fund	18000.0	2024-01-10	16800.0	1	12	12.0	Growth plan	1
2	2	Gold	26000.0	2023-12-05	28900.0	2	24	9.0	Gold SIP	1
3	3	Fixed Deposit	31000.0	2023-11-20	33300.0	1	12	11.0	1-year FD	1
4	4	Mutual Fund	12000.0	2024-02-12	13000.0	1	12	10.0	Equity fund	2
5	5	Gold	22000.0	2023-10-18	25200.0	2	24	8.0	Digital gold	2
6	6	icici stock	28000.0	2023-09-15	31500.0	1	12	11.0	stock investment	2
7	7	Mutual Fund	18000.0	2024-01-25	19700.0	1	12	11.0	Index fund	3
8	8	Gold	27000.0	2023-12-10	31000.0	2	24	9.0	Gold bonds	3
9	9	Fixed Deposit	32000.0	2023-10-01	36000.0	1	12	11.0	1-year FD	3
10	10	Mutual Fund	16000.0	2024-02-15	17500.0	1	12	10.0	Balanced MF	4



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- Sample stock investment records showing user ID, stock symbol, quantity, and buy price.

	<u>id</u>	<u>user_id</u>	symbol	quantity	buy_price
	Fil...	Filter	Filter	Filter	Filter
1	1	1	TCS	7	1200.0
2	5	1	INFY	2	1200.0
3	7	21	TCS	2	1200.0
4	12	1	INFY	1	1000.0



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3 User Manual

3.1 Home Page

- Provides an overview of the MonthVest system.
- Navigation options to Sign Up, Login, and access other pages.

3.2 Sign Up Page

- Users can register by entering name, email, password, and selecting a category (Student, Adult, Senior Citizen, Women).
- Validations: All fields are required; email must be unique.

3.3 Login Page

- Users log in with registered email and password.
- Invalid credentials are rejected, and successful login redirects to the dashboard.

3.4 Dashboard Page

- Shows total investment, current value, profit/loss, ROI, and charts.
- New Feature: Displays live stock prices using the Yahoo Finance API, including stock symbol, current price, and percentage change.
- Helps users track investments in real time and understand overall portfolio performance.

3.5 Add Investment Page

- Users can add new investments like Mutual Funds, Fixed Deposits, SIPs, or Gold.
- Required inputs: investment type, amount, start date, and duration.
- Validations: All fields must be filled; numeric and date validations applied.

3.6 Add Stock Page

- Users enter stock symbol (e.g., TCS.NS), quantity, and buy price.
- System fetches current stock prices from Yahoo Finance API and calculates the current value and profit/loss.
- Supports real-time tracking of stock investments.

3.7 Edit / Delete Investment Page

- Users can update or remove existing investments.
- Validations ensure that updates do not violate data integrity.



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3.8 Monthly Performance Page

- Shows monthly portfolio trends, including category-wise returns and total investment growth over months.
- Includes charts to visualize trends and ROI.

3.9 Investment Suggestions Page

- Provides recommendations based on current investments.
- Suggests reallocating funds from low-performing assets to higher-return options.
- Supports user decisions for better diversification and optimized returns.

4.0 Reports

- Users can generate PDF or Excel reports of their investments (future enhancement).
- Reports include total investment, category-wise performance, and monthly growth.

4.1 User Profile Page

- Displays user information including name, email, and category.
- Users can update profile information and change passwords securely.