

Navigation bar (dashboard, holdings, transactions, settings)

search bar for adding investment

User

Total Portfolio Value: \$1.8M | P&L: +4.2%

List | pie

list of your assets  
tick, growth, quantity, latest buy price, latest sell price

Performance Line Chart

Portfolio vs Benchmark over selected period

Toggle: 1W, 1M, 3M, YTD, 1Y, 5Y

pie chart for total portfolio by <filter>

Filter by: (asset type, gain, asset amount, etc.)

Top 5 Holdings Table (gainers & losers)  
Ticker | Quantity | Market Value | % of Portfolio

Recent activity feed (Your recent actions)  
Date | Action | Ticker | Qty | Price

Summary Tiles (Top Row)

- **Total Portfolio Value**
- **Day's Gain/Loss**
- **YTD Return**
- **Cash Balance**

Each tile should use intuitive color coding (green = positive, red = negative) and small icons (e.g., ↑, ↓,    ).

Charts and Visuals (Center)

- **Asset Allocation Pie Chart**
  - By asset class (equity, bond, cash)
  - Toggle: By sector / region / currency
- **Performance Line Chart**
  - Portfolio vs Benchmark over selected period
  - Toggle: 1W, 1M, 3M, YTD, 1Y, 5Y
- Sector Allocation

Navigation bar (dashboard, holdings, transactions, settings)

search bar for adding investment

User

Total Portfolio Value: \$1.8M | P&L: +4.2%

List | pie

pie chart for total portfolio by <filter>

Filter by: (asset type, gain, asset amount, etc.)

Top Movers | Top Gainers | Top Losers

From Sumer and Lareb

Watchlists Performance

one

two

Three

Recent activity feed (Your recent actions)  
Date | Action | Ticker | Qty | Price

Performance Line Chart

Portfolio vs Benchmark over selected period

Toggle: 1W, 1M, 3M, YTD, 1Y, 5Y

Summary Tiles (Top Row)

- **Total Portfolio Value**
- **Day's Gain/Loss**
- **YTD Return**
- **Cash Balance**

Each tile should use intuitive color coding (green = positive, red = negative) and small icons (e.g., ↑, ↓,    ).

Charts and Visuals (Center)

- **Asset Allocation Pie Chart**
  - By asset class (equity, bond, cash)
  - Toggle: By sector / region / currency
- **Performance Line Chart**
  - Portfolio vs Benchmark over selected period
  - Toggle: 1W, 1M, 3M, YTD, 1Y, 5Y
- Sector Allocation