CNV Investments (Portfolio Tracker)

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Description

- Investment portfolio tracker
- Fund manager keeps track of investment for his/her investors
- Users can access their portfolio in one webpage

Features

- Secure Access
  - Fund managers creates user/investor profiles
  - Users/Investors then get access to their particular portfolio
- Portfolio pages a hub for all key information
  - Shares real time portfolio data (getting live shared price from third party API)
  - Users are able to see their portfolio performance, transactions

Planning - User Stories

- Investor
    - Able to track their investments on a real time basis
- Fund Manager
    - Able to create portfolios for all their clients
    - Provide individual investors with their login information

Login Page

CNV Investments

Username

Password

Enter

Don't have an account? Register for one.

Transactions Page

CNV Investments

User	Security	Transaction Date	# of Shares	Cost Price	Invested Capital
niranjan	Apple Inc	2022-01-01 00:00:00.0	10	10	100
niranjan	Apple Inc	2022-01-01 00:00:00.0	-5	20	-100

Portfolio

Transactions

Add Transaction

Logout

Transaction Form Page

CNV Investments

Add Transaction

User `niranjan` ⇕ [Add User](#)

Security `Apple Inc` ⇕ [Add Security](#)

Date

[   ]

\# of Shares

[0   ]

Cost per share

[0   ]

[Add Transaction]

Planning - Database

Describe what tables are necessary in your DB, and how they relate to one another. Your goal is to show how you designed your database to allow for the user stories listed above.

- User
- Security
- Transaction
- Portfolio

Technology Stack

- Full stack application:
    - Frontend: Thymeleaf (Template Engine), Bootstrap (UI Library)
    - Backend: Java (Language), Spring boot (Web framework)
    - Database: MySQL
    - External API - to update share prices (to be linked soon)

Demo

What I Learned

- Working in Teams
- Getting more familiar with Git
- New technique
  - connecting to an API
  - Created admin(fund manager) dashboard
- New feature or problem
  - creating a user profiles

What's Next

- Another features:
    - Calculations of Capital Gains (helps for taxation at the investor level)
    - Create trading strategies
    - Users/Investors are able to change passwords (to make it more secure)