Portfolio Tracker Project: Inspired by

1. <https://www.youtube.com/watch?v=gAI218HSK8s&list=PLx-q4INfd95G-wrEjKDAcTB1K-8n1sIiz&index=2>
2. TODO: Update.

# Introduction:

We build a Customer Relationship management (CRM) system based on modern portfolio and Risk management analytics.

The platform allows clients to:

1. See clear summaries on the evolution of various portfolio analytics relevant to the current state of their holdings.
2. See visuals that depict, clearly, the analytics described in 1.
3. See products currently available on sale.
4. Execute transactions: \*
   1. Buy or sell more units of existing holdings
   2. Buy units of available products advertised. These will require approval from the advisor
5. See a paginated history of transactions
6. See and export reports that provide meaningful summaries of their holdings over selected time horizons i.e quarterly, monthly, custom.

The platform allows advisors/managers to:

1. See clear summaries on the evolution of various portfolio analytics relevant to the current state of the holdings of their clients:
   1. Both at the collective and
   2. Individual level
2. See visuals that depict, clearly, the analytics described in 1.
3. See products currently available on sale.
4. Add products to the current products list\*
5. Execute transactions on behalf of their clients: \*
   1. Buy or sell more units of existing holdings
   2. Buy units of available products advertised.
   3. This functionality will include approving trades on behalf of clients
6. See a paginated history of transactions for their clients
7. See and export reports that provide meaningful summaries of the holdings of their clients over selected time horizons i.e quarterly, monthly, custom.

# Data Models

1. Each client belongs to one and only one manager.
2. Clients can be individuals or corporations.
   1. For individuals it is the individual himself
   2. For corporations it is a representative
3. Each manager however has several clients.

Required Data models:

1. User
2. Client
3. Account
4. Security/Instruments
5. Instrument Prices

# Analytics

https://coderthemes.com/hyper\_2/saas/dashboard-analytics.html#

# Authentication

Usernames will be prepopulated on request of the advisor.

1. Clients will have a landing page where they populate 3 parameters.
   1. Username: Authentication to check for special characters will be in place
   2. Email address: Authentication to check for email validity will be in place
   3. Passwords: These will be autogenerated to begin with and shared with clients. Clients can reset their passwords whenever.