

Personal Investment Portfolio Manager (PIPM)

Problem Domain: Addresses the challenge of tracking and managing personal investments across multiple different portfolios with multiple different securities in each.

- Tracks securities across multiple different exchanges
- Monitors portfolio performance and holdings
- Records investment transactions made on each portfolio
- Each user can maintain a watchlist of securities

Solution Description and Features:

1. Portfolio Management:
 - Create and manage multiple portfolios per user
 - Tracks holdings for each portfolio
 - Monitors value and performance of each portfolio
2. Security tracking:
 - Over 1000 of the most popular securities included in the database
 - Static prices updated as of May 2nd 2025.
3. Transaction management:
 - Records buy and sell transactions
 - Tracks transaction history for each portfolio
 - Calculates holding quantity

User Interfaces:

1. Login/ Register Interface
 - Allows users to create accounts and login to existing accounts
 - Includes password verification
2. Dashboard
 - Allows users to create new portfolios
 - Shows users their existing portfolios
3. Portfolio view
 - Allows users to see what holdings are currently in their portfolio
 - Allows users to make transactions to their portfolio (BUY/SELL securities)
4. Watchlist page
 - Allows users to add and remove securities to and from their watchlist
 - Allows users to view their current added watchlist
5. Profile page:
 - Shows username and date in which the account was created

Technologies Used:

1. Backend:

- Spring Boot (Java)
- MySQL dockerized

2. Frontend:

- ReactJS