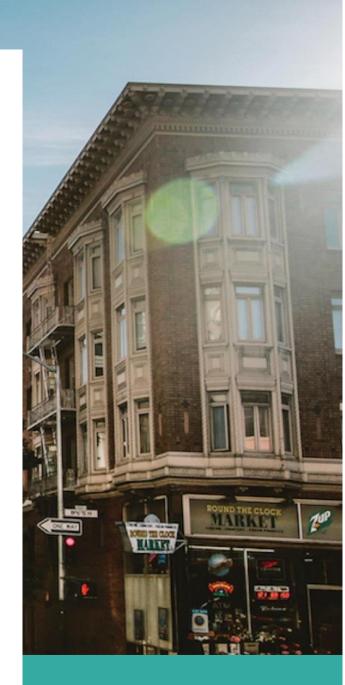


Smallcase

Backend task Documentation



Sept 10

Harshit Singhai Software Engineer

Smallcase Portfolio Tracking API.

Portfolio Tracking API.

A portfolio tracking API which allows adding/deleting/updating trades and can do basic return calculations etc. For simplicity, we assume there is only one user who can have single portfolio.

Basic functionality includes -

- Get all trades from portfolio
- 2. Add trade to portfolio
- 3. Buy Shares
- 4. Sell Shares
- 5. Remove trade from portfolio Get all holdings.
- 6. Get cumulative returns of portfolio.

Heroku Base URL: https://harshit-portfolio-tracking.herokuapp.com/

Trade URL: https://harshit-portfolio-tracking.herokuapp.com/trade

Portfolio URL: https://harshit-portfolio-tracking.herokuapp.com/portfolio

Postman Collection: https://www.getpostman.com/collections/3bdf4af0c492373202d7

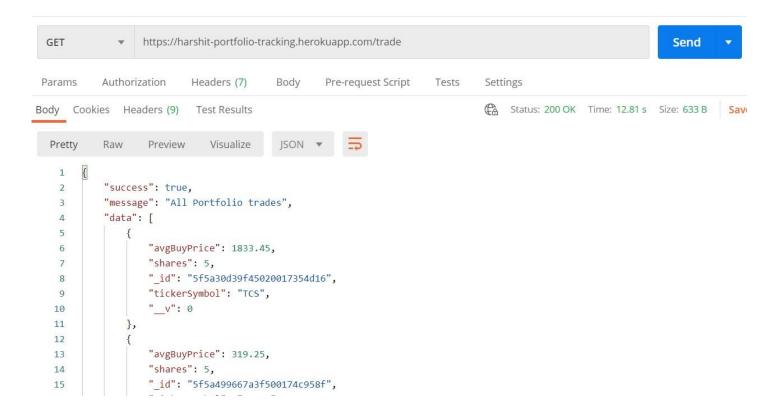
Documentation: https://documenter.getpostman.com/view/7585955/TVCmTR1f

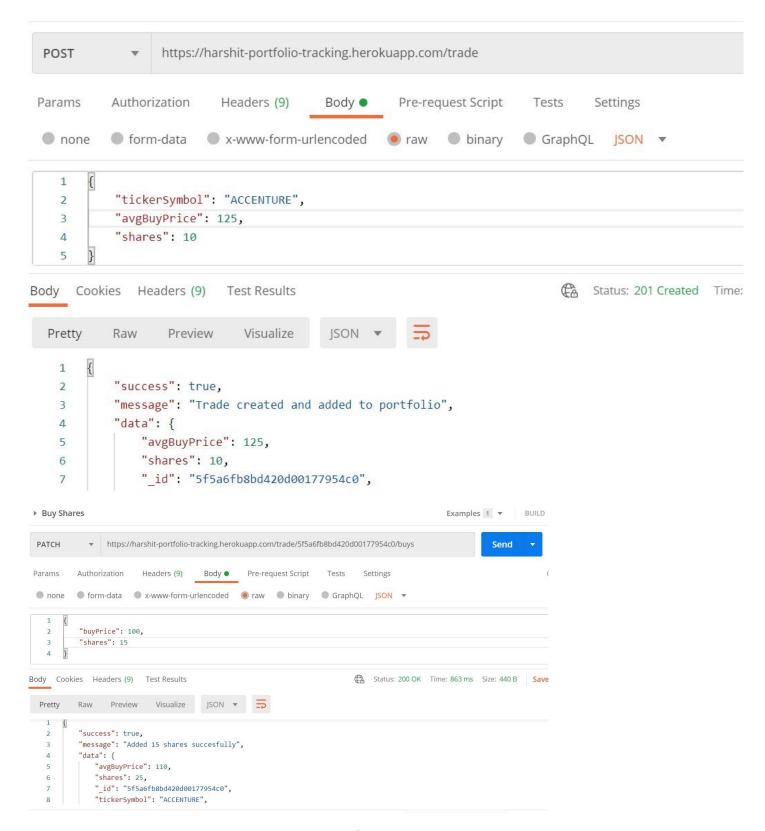
Getting started:

- 1) git clone https://github.com/harshitsinghai77/portfolio-tracking-node-API.git
- 2) Navigate to folder
- 3) Run npm install
- 4) node app.js

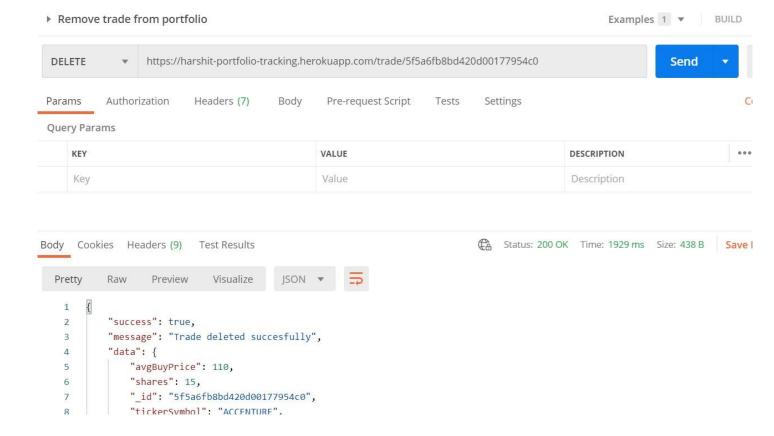
Working Demo

The following screenshots will help with the payload and the expected result

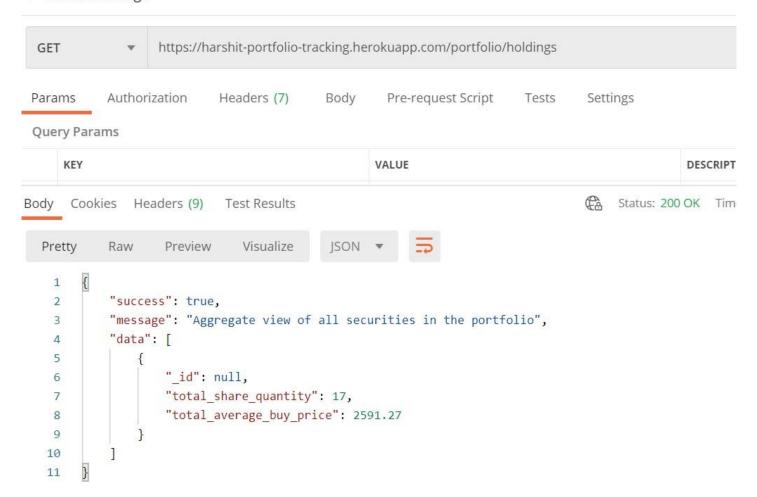


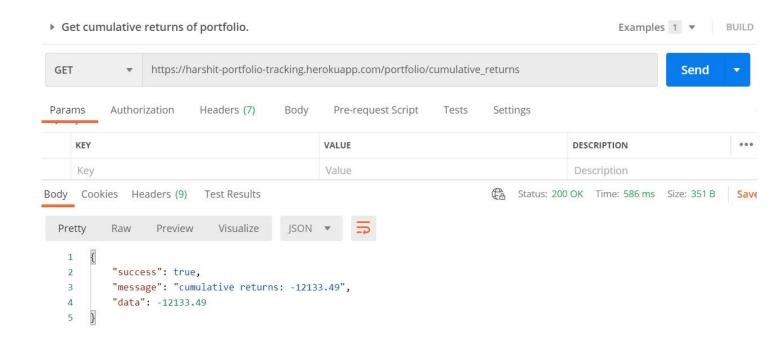


Sell Shares Examples https://harshit-portfolio-tracking.herokuapp.com/trade/5f5a6fb8bd420d00177954c0/sells **PATCH** Params Authorization Headers (9) Body • Pre-request Script Tests Settings none form-data x-www-form-urlencoded raw binary ■ GraphQL JSON ▼ 1 2 "shares": 10 Body Cookies Headers (9) Test Results Status: 200 OK Time: 977 ms 5 Pretty Raw Preview Visualize 1 "success": true, 2 "message": "Total 10 shares sold successfully", 3 "data": { 4 "avgBuyPrice": 110, 5 "shares": 15, 6 "_id": "5f5a6fb8bd420d00177954c0", 7 "tickerSymbol": "ACCENTURE".



▶ Get all holdings





Important Notes:

- 1. Payload information can be found in the documentation here at Documentation: https://documenter.getpostman.com/view/7585955/TVCmTR1f
- 2. Postman collection can be found at https://www.getpostman.com/collections/3bdf4af0c492373202d7

Docstrings and comments

Docstrings and comments are included in the code as required.

Error handling

The below errors are handled in the flask app

- 1) Content type should be application/json
- 2) Post body cannot be empty.

Response format

All responses consists of the following format

1) success: boolean

2) message: string

3) data: Object

Thanks

Thank you for giving me this opportunity. I would love if you could provide a feedback. Looking forward to hearing from you soon

Find me at

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