

TALLINNA TEHNIKAÜLIKOO
School of Information Technologies

Investment Manager Web Application
Distributed systems project

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Project overview

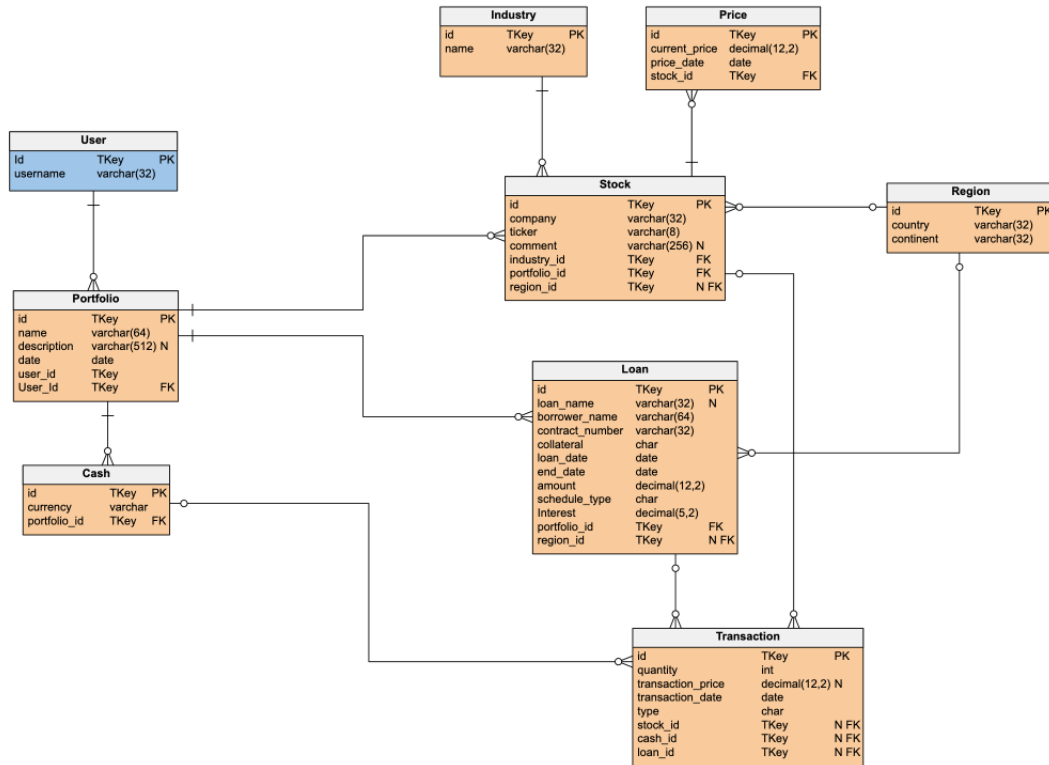
In investing it is important to have an accurate understanding how portfolio is allocated, what are the risks and where is the profit coming from. Without proper overview of investments it is tendency to underestimate risk and difficult to make profitable future decisions. Banks, stock brokers, crowdfunding websites and other existing environments are giving detailed overview but only in this specific asset class. If portfolio is divided through several asset classes, there is a need to transfer all the data from every environment to excel. Managing investment portfolio in excel is going to be complicated really quickly. Not knowing right formulas and excel in good level may cause mistakes and takes a lot of time.

Investment Manager Web Application makes portfolio managing easy to everyone. After creating user and logging in, there is possibility to create portfolio. One user can have several portfolios to separate private and company investments for example. To each portfolio can be added stocks, loans and cash. After inserting all investments and assets to the application, user will get proper overview of portfolio.

User has to add each investment manually, in addition to adding name, it is also important to include price and date of purchase. This is the minimum portion of data to get any useful information out of it. If user likes to have even more detailed overview, there is a possibility to add region and industry as well. To get accurate retrospective overview there is a need to update latest prices at least once a month. If the user forgot to update the prices in time, it can be done retroactively. In the next version prices are automatically renewable once a day.

Application provides possibilities to watch yield by portfolio, asset class, individual stock, individual loan, year and month. User can also filter assets by yield or change in amount. This kind of detailed overview helps to understand which instruments are more profitable and which less. Application also shows how portfolio is divided through different asset classes, inside the asset class, in regions or in industries. All the data is illustrated with graphs and are easy to understand. With such a proper overview, users are able to make considered decisions in the future.

ERD Schema



Screens sketches

