

# **INVESTMENT FUND MANAGEMENT SYSTEM**

## **Background**

The motivation to build this system comes from the limitations of traditional methods, which heavily rely on manual processes/work, spreadsheets to track investments, and paper records, which lead to inefficiencies, a higher risk of errors, and are also time-consuming. As investment portfolios become more complex and global, involving investment types like mutual funds, hedge funds, bonds, and so forth, building an investment fund management system offers a more efficient and accurate way to manage financial assets and improve decision-making. User can leverage this system to create, update and delete their investment data which can help them better manage their investment strategy. This reduces a lot of time for them as they have a centralized source of data to refer if they ever need to go back and trace their history to make a better decision either now or in future.

## **Purpose**

- To provide users with a foundation for tracking and maintaining their investment history efficiently.
- To help users organize their investments into logical categories, enabling clearer insights and improved analysis.
- To facilitate easier handling of large and often confusing data sets
- Prevention of loss of data
- To create an interface which can be used by both fund managers and investors, making it easy to access, manage, and analyse investment data.

## **Scope -**

Investment Fund Management System will be used as a personal database for a user to keep track of their investments. It offers a simple way to store and organize investment records. Users can log their investments, track transactions, categorize their holdings, and generate basic reports to view the makeup of their portfolios. Key features include user account management, investment tracking, transaction history, a portfolio overview, and the ability to import and export data. The project focuses on creating a user-friendly interface backed by a solid database design, ensuring data accuracy, easy access to information, and security for personal financial details. This would address ease of use for the user in terms of data storage and help them better organize their investment history.

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