

CS 546 GROUP PROJECT PROPOSAL

PORTFOLIO MANAGEMENT SYSTEM

TEAM (GROUP NO. 18)

DEEP CHITRODA - 10442200

NEIL SHARMA - 10452486

ANKIT TALAVIYA - 10443864

RAJAT VERMA - 10451721

ABSTRACT

This system allows everyone to go into our application and have a look on the current set of stocks with a view whether to buy, sell or hold. This is calculated using votes given by the authorised users. In order to vote for a stock, a person needs to register on the system. Once registered, a user is authorised to buy, sell, mark stock as favourite or give opinion (vote) about any stock. Our system uses stock data as stored in the database with pre-defined quantity.

CORE FEATURES

- **Login / Sign Up**
 - Users have option to sign up, after which they can sign into the system and have options to vote, buy or sell a stock.
- **Search for a stock (by ticker symbol or by name)**
 - Authorized users can search for stock by its name or ticker symbol and have the options to buy, sell, mark favourite or vote.
 - Un-authorised users can too search for a stock, but they'll not have any option except to view the polling result whether to buy, sell or vote the stock.
- **Authentication and security**
 - Hitting back button after logging out will not result in the account page being displayed.
- **Main page:**
 - The main page includes all the stocks with their polling result if users have voted for a stock. At the top, there's an option to login or sign up.
 - It also includes a search feature, to search for a stock if users want to see a particular stock.
- **Favourites**
 - Authorised users can mark stocks of their choice as favourites, which gets added onto their favourite section
- **Portfolio section**
 - This section includes list of all stocks that one has purchased.
- **Vote**
 - Only authorised users are allowed to vote on stocks with 3 options – buy, sell or hold
- **Buy**
 - Authorised have option to buy any stock. When the user clicks on buy after specifying quantity and type – 'intraday' or 'Cash and Carry', it checks the database for

the quantity, if it is available to buy, their portfolio section is updated with that stock and the stock database is updated with the new quantity after subtracting the purchased quantity; and if not, the user is given a message stating the number of shares available to buy.

- **Sell**
 - Authorised users have the option to sell those stocks which they've bought. Once it is sold, the portfolio gets updated; and the database for stocks is updated with the new quantity after adding the sold quantity.

EXTRA FEATURES

- Incorporate data changing at regular intervals (live data)
- All authorised users get the privilege to have a look at their personalised profit/loss (P/L) statement by choosing date range.
- Generate charts based on profit loss data.