FINANCIAL ASSET MANAGEMENT

Project Members -

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Problem Background :

The investment market is immense with plenty of options to invest in! The concern we have identified is that many people invest in various schemes provided by the market, but they lack a singular platform where they can store their data, analyze their investments and prepare for next sets of investments based on the returns.

The data is abundant but less exposure to insightful information. With this background on the problem in our mind, we aim to solve it!

Problem Statement :

Investors do not have an integrated view of their investments which, if they had, would leverage them to make rapid investment decisions to track their economic growth - present and future.

Problem Objectives :

- ☐ To create tables & views in the database with income & investment attributes with data segregation of different investment portfolios of customers such as Investments in Metals, Stocks, Mutual Funds,Cryptocurrency etc.
- ☐ To bulk upload the data in respective tables & track the investments - whether it is making a profit or going into loss.

- ☐ To calculate the ratings which are the sql functions on how the investment is performing with respect to the customer expectations.
- ☐ To write the stored procedures to analyze the data and send it to a research centre for further analysis.

End Result :

- ☐ Bringing the investment data of customers in one place.
- ☐ Customer's data is stored in structured format so it is readily accessible and easy to retrieve.
- ☐ Data stored in Oracle cloud which is far more secure and easy to access at an affordable price.
- ☐ It may give investors an idea how investment is performing with respect to their expectations or future goals.