

Project Description: Portfolio Management Application

High-Level Overview: The Portfolio Management Application is a user-friendly dashboard that empowers users to efficiently manage their investments across multiple portfolios. The app provides real-time market data, fund tracking, and customizable alerts to keep users informed while offering offline accessibility.

Minimum Viable Product (MVP):

1. Dashboard:

- A real-time, visually intuitive dashboard.
- Customizable widgets such as watchlists, market news, and portfolio summaries.

2. Fund Tracking:

- Add or remove funds from portfolios.
- Display historical NAV (Net Asset Value) trends.
- Calculate and track gains/losses and dividends, with support for reinvestment tracking.
- Provide automated portfolio rebalancing suggestions based on user-defined rules.

3. Alerts:

- Customizable notifications via SMS or push for:
 - Fund-level price changes.
 - Dividend announcements.
 - Predictive alerts (e.g., significant price movement).

4. Multi-Portfolio Support:

- Enable management of separate portfolios under one account.
- Clear separation of data for each portfolio while providing summary statistics across all portfolios.

5. Data Export:

- Allow CSV and PDF export for portfolio and fund data.

6. Offline Mode:

- Enable users to view cached portfolio data without an internet connection.

External Integrations:

- API integrations to pull real-time market data and historical NAVs from publicly available financial data sources like Yahoo Finance or Alpha Vantage.
- SMS/Push notification service integrations (e.g., Twilio for SMS and Firebase for push notifications).
- Support for scheduled background data syncing to maintain offline cache validity.

The MVP focuses on delivering essential features to streamline portfolio management while enabling iterative improvements for advanced analytics, predictive reports, and integrations with additional financial services.