

# Growfolio iOS

App Flow Documentation



Dollar Cost Averaging Investment App  
Automated investing made simple

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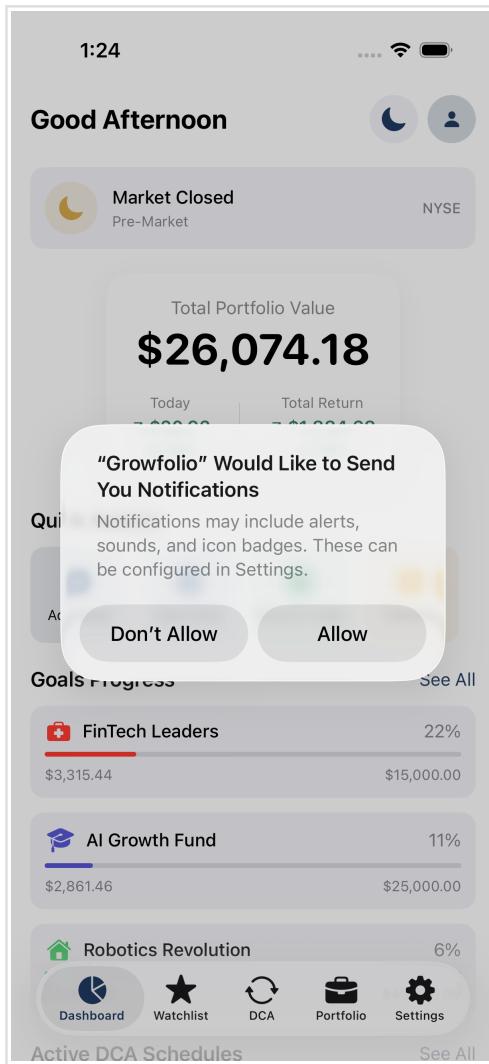
# Dashboard

Tab 1

The main hub of Growfolio. Shows your portfolio summary at a glance, current market status, quick action buttons, goals preview, and recent activity feed.

Navigation:

→ Entry point after login. From here, navigate to any tab via the bottom tab bar, or tap quick actions to deposit, create goals, or set up DCA schedules.



# Dashboard (Scrolled)

Tab 1

Additional dashboard content revealed by scrolling. Includes DCA schedule preview showing upcoming automated investments and the activity feed with recent transactions.

Navigation:

→ Scroll up to return to portfolio summary. Tap any activity item to view transaction details.

The screenshot displays the 'Dashboard (Scrolled)' interface. At the top, there are two cards: 'AI Growth Fund' (11% completion, \$2,861.46 total value) and 'Robotics Revolution' (6% completion, \$2,604.03 total value). Below these is a section titled 'Active DCA Schedules' with five entries:

Symbol	Company Name	Frequency	Next Investment Date
V	Visa Inc. (V)	\$60.00 Bi-weekly	Jan 21
MA	Mastercard Incorporated (MA)	\$60.00 Bi-weekly	Jan 21
SQ	Block Inc. (SQ)	\$40.00 Bi-weekly	Jan 21
PY	PayPal Holdings Inc. (PYPL)	\$40.00 Bi-weekly	Jan 21

Following this is a section titled 'Recent Activity' which currently shows 'No Recent Activity'. Below this are five navigation icons: Dashboard (selected), Watchlist, DCA, Portfolio, and Settings.

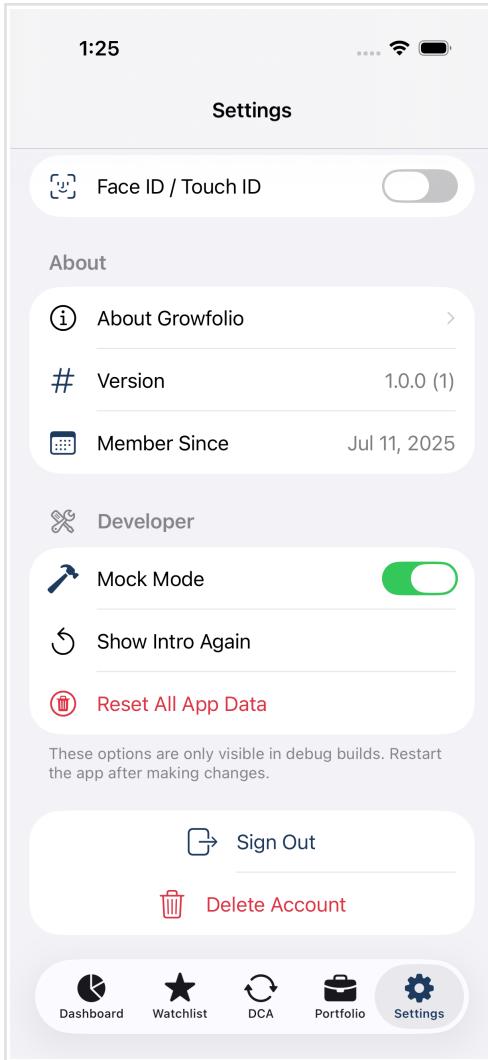
# Watchlist

Tab 2

Your tracked stocks and securities. Each row displays the stock symbol, company name, current price, and daily change percentage with color-coded indicators.

Navigation:

- Tap any stock row to open the Stock Detail sheet. Use the search button to find and add new stocks to your watchlist.



# Stock Detail

Sheet

Detailed view of a selected stock. Features an interactive price chart with period selectors (1D, 1W, 1M, 3M, 1Y, 5Y), current price, daily change, and action buttons.

Navigation:

→ Presented as a sheet from Watchlist or search. Tap 'Buy' to purchase shares, 'Add to DCA' to create an automated schedule, or close to return.

The screenshot shows a mobile application interface for managing a portfolio. At the top, it displays the time (1:25), signal strength, and battery level. Below this is a header with 'Portfolio' and a three-dot menu icon. A large central box shows the 'Total Value' as **\$26,281.84**. Below this, it provides performance metrics: 'Total Return' (\$2,092.34 up +8.65%), 'Return %' (+8.65%), and 'Cash' (\$2,500.00). A row of buttons at the bottom allows switching between time periods: 1D, 1W, 1M (selected), 3M, 6M, and 1Y. The main content area is titled 'Holdings' and lists seven positions:

Symbol	Name	Shares	Total Value	Change
VOO	Vanguard S&P 500 ETF	15	\$6,583.50	+7%
VTI	Vanguard Total Stock Market ETF	20	\$4,830.20	+5.9%
MSFT	Microsoft Corporation	12.3	\$4,734.52	+10%
AAPL	Apple Inc.	25.5	\$4,554.56	+8.2%
NVDA	NVIDIA Corporation	5.5	\$2,655.73	+15%
AMZN	Amazon.com Inc.	10	\$1,758.70	+13.5%

At the bottom, there are five navigation icons: Dashboard (pie chart), Watchlist (star), DCA (refresh), Portfolio (briefcase), and Settings (gear).

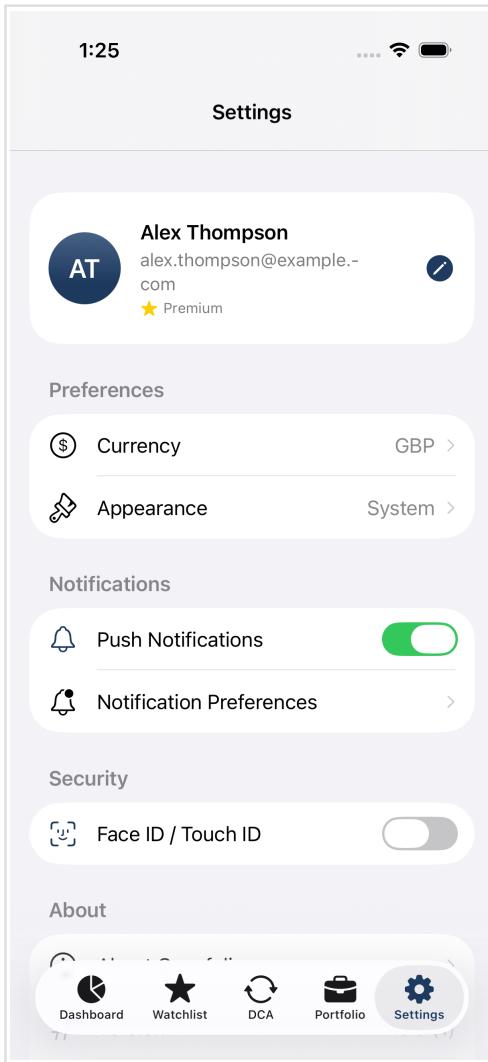
# Stock Detail (Scrolled)

Sheet

Extended stock information including company description, key statistics, AI-powered insights, and analyst ratings with price targets.

Navigation:

→ Scroll up to return to the chart and action buttons. Tap AI insights to get personalized analysis.



# DCA Schedules

Tab 3

Dollar-Cost Averaging automation center. View all active schedules with their frequency, amount, and next execution date. Total monthly investment shown at top.

Navigation:

→ Tap any schedule to view/edit details. Use the '+' button to create a new DCA schedule. Swipe to pause or delete schedules.

The screenshot shows a smartphone interface for a financial application. At the top, the time is 1:25 and there are connectivity and battery icons. Below this is a header with 'Portfolio' and a three-dot menu icon. The main content area is divided into several sections:

- Portfolio:** Shows four stocks: AAPL (Apple Inc.), NVDA (NVIDIA Corporation), AMZN (Amazon.com Inc.), and GOOGL (Alphabet Inc.). Each entry includes the stock symbol, company name, number of shares, total value, and percentage change (e.g., \$4,554.56, +8.2%).
- Allocation:** Displays the distribution of assets across five categories: VOO, VTI, MSFT, AAPL, and NVDA. Each category has a colored bar chart and its corresponding percentage (e.g., 25%, 18.4%, 18%, 17.3%, 10.1%).
- Recent Activity:** A section stating "No recent transactions".
- Bottom Navigation:** A footer bar with five icons: Dashboard (pie chart), Watchlist (star), DCA (refresh), Portfolio (briefcase), and Settings (gear).

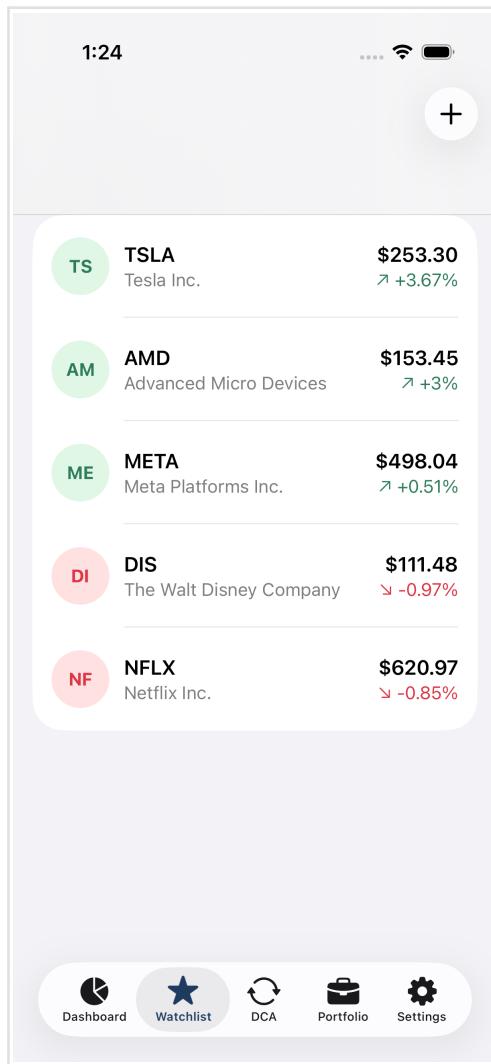
# Portfolio

Tab 4

Complete holdings overview. Shows total portfolio value, overall returns (amount and percentage), available cash balance, and individual position breakdown.

Navigation:

→ Tap any holding to view position details and transaction history. The pie chart visualizes your asset allocation.



# Portfolio (Scrolled)

Tab 4

Transaction history and performance metrics. Lists all buy/sell transactions with dates, amounts, and prices. Performance chart shows portfolio growth over time.

Navigation:

→ Tap any transaction for details. Use filters to view specific date ranges or transaction types.

The screenshot displays a smartphone interface for the stock TSLA. At the top, the time is 1:24 and the battery level is shown. Below the status bar, the stock symbol "TSLA" is centered. On the far left is a circular "X" button, and on the far right is a circular button with three dots. The main content area is divided into several sections:

- Key Statistics**:
  - Market Cap: \$780.00B
  - P/E Ratio: 72.50
  - Volume: 43.45M
- Day Range**: \$247.90 - \$253.20
- 52 Week Range**: \$177.00 - \$303.43
- Sector**: Consumer Cyclical
- Industry**: Auto Manufacturers
- About**:

Tesla designs, manufactures, and sells electric vehicles, energy storage systems, and solar products.
- AI Insights**:
  - A small blue star icon followed by the text "AI Insights".
  - A grey button with the text "Get AI Analysis" and a small arrow icon.

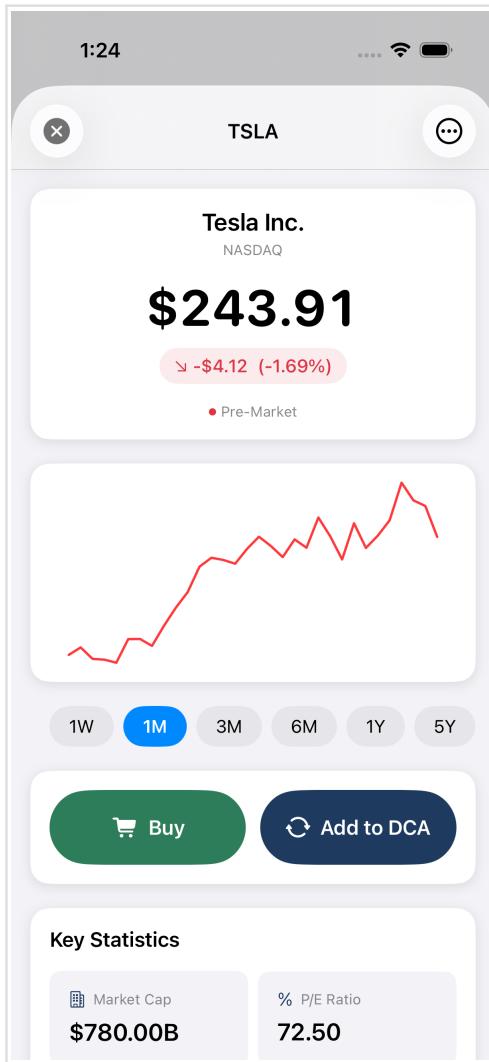
# Settings

Tab 5

App configuration and account management. Includes profile settings, display preferences (currency, theme), notification controls, and linked accounts.

Navigation:

→ Tap any setting row to modify. Profile section allows editing personal information and preferences.



# Settings (Scrolled)

Tab 5

Additional settings including security options (Face ID, passcode), help & support, about section with app version, and account actions (sign out, delete account).

Navigation:

→ Tap 'Sign Out' to log out. 'Delete Account' requires confirmation. 'About' shows version info and legal documents.

