# Design Notes

There will be 2 roles

1 – Normal user – he will have read only view of the portfolio.

2- Admin user who can do the CRUD for MF and all other activities.

Here are the attributes we would need for the portfolio

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| S.no | Field name | Type | Role | Comments |
| 1 | Client name | String | Admin | Group portfolio by client name |
| 2 | MF name | String | Admin/user |  |
| 3 | Folio number | Integer | admin |  |
| 4 | Invested amount | Integer | Admin/user |  |
| 5 | units | Decimal | Admin/user |  |
| 6 | NAV | Decimal | Admin/user |  |
| 7 | XIR | Decimal | Admin/user |  |

Here are the attributes for user details

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | First name | String | Admin/user |
| 2 | Last name | String | Admin/user |
| 3 | Email | String | Admin/user |
| 4 | Phone number | Integer | Admin/user |
| 5 | Date of birth | String | Admin/user |
| 6 | Pan number | String | Admin/user |

Here are the attributes for adding MF

|  |  |  |  |
| --- | --- | --- | --- |
| 1 | MF name | String | Admin |
| 2 | Invested amount | String | Admin |
| 3 | Frequency | String | Admin |