

portfolio-tracking

A portfolio tracking API which allows adding/deleting/updating trades and can do basic return calculations etc

Getting Started

These instructions will get you a copy of the project up and running on your local machine for development and testing purposes.

Prerequisites

You need to have Node installed on your local machine, then after cloning the project run the following command in the project directory to install the dependencies in the node_modules folder.

```
npm install
```

But this app involves database url which is hidden. you can access the app on heroku using

```
https://portfolio-tracking.herokuapp.com/portfolio
```

After Installing

(The app will run only if you have the app-env file (having the database url) in your project folder otherwise you can access the app on heroku)

A step by step series of examples that tell you have to get a development env running

Run the following command to start the server.

```
npm start
```

Your application should now be running on localhost:3000.

Testing it on Postman

You need to have Postman installed for testing the APIs.

Postman Documentation

Here are the following routes :

<https://portfolio-tracking.herokuapp.com/portfolio/createPortfolio> - will create a portfolio

POST <https://portfolio-tracking.herokuapp.com/portfolio/createPortfolio> Params Send Save

Authorization Headers (1) **Body** Pre-request Script Tests Code

☐ form-data ☒ x-www-form-urlencoded ☐ raw ☐ binary

| | Key | Value | Description | ... | Bulk Edit |
|-------------------------------------|---------|------------|-------------|-----|-----------|
| <input checked="" type="checkbox"/> | name | portfolio1 | | | |
| | New key | Value | Description | | |

Body Cookies Headers (6) Test Results Status: 200 OK Time: 303 ms

Pretty Raw Preview JSON

```

1 {
2   "success": true,
3   "message": "Portfolio created successfully"
4 }

```

<https://portfolio-tracking.herokuapp.com/portfolio/> - will return the entire portfolio

GET <https://portfolio-tracking.herokuapp.com/portfolio/> Params Send Save

Authorization Headers Body Pre-request Script Tests Code

Type No Auth

Body Cookies Headers (8) Test Results Status: 200 OK Time: 1741 ms

Pretty Raw Preview JSON

```

1 {
2   "success": true,
3   "data": [
4     {
5       "trades": [
6         {
7           "id": "5b6ea6512ccbee12f98b698f",
8           "stockName": "RELIANCE",
9           "portfolioName": "portfolio1",
10          "price": 900,
11          "quantity": 100,
12          "tradeType": "BUY",
13          "date": "2018-11-16T11:13:21.682Z",
14          "createdAt": "2018-11-16T11:13:21.705Z",
15          "updatedAt": "2018-11-16T11:13:21.705Z",
16          "__v": 0
17        },
18        {
19          "id": "5b6ea66f2ccbee12f98b6990",
20          "stockName": "RELIANCE",
21          "portfolioName": "portfolio1",
22          "price": 1000,
23          "quantity": 100,
24          "tradeType": "SELL",
25          "date": "2018-11-16T11:13:51.572Z",
26          "createdAt": "2018-11-16T11:13:51.575Z",
27          "updatedAt": "2018-11-16T11:15:25.416Z",
28          "__v": 0
29        }
30      ]
31    }
32  ]
33 }

```

<https://portfolio-tracking.herokuapp.com/portfolio/holdings> - will return the holdings of different stocks

GET <https://portfolio-tracking.herokuapp.com/portfolio/holdings> Params Send Save

Body Cookies Headers (6) Test Results Status: 200 OK Time: 438 ms

Pretty Raw Preview JSON

```

1 {
2   "success": true,
3   "data": [
4     {
5       "stockName": "RELIANCE",
6       "price": 875,
7       "quantity": 100
8     },
9     {
10      "stockName": "HDFC",
11      "price": 1000,
12      "quantity": 100
13    }
14  ]
15 }

```

<https://portfolio-tracking.herokuapp.com/portfolio/returns> - will return the cumulative returns

GET <https://portfolio-tracking.herokuapp.com/portfolio/returns> Params Send Save

Authorization Headers Body Pre-request Script Tests Code

Type No Auth

Body Cookies Headers (6) Test Results Status: 200 OK Time: 450 ms

Pretty Raw Preview JSON

```

1 {
2   "success": true,
3   "data": {
4     "type": "Loss",
5     "cumulativeReturn": 175000
6   }
7 }

```

<https://portfolio-tracking.herokuapp.com/portfolio/addTrade> - will add trades in the database

POST <https://portfolio-tracking.herokuapp.com/portfolio/addTrade> Params Send Save

form-data x-www-form-urlencoded raw binary

| | Key | Value | Description | ... | Bulk Edit |
|-------------------------------------|---------------|------------|-------------|-----|-----------|
| <input checked="" type="checkbox"/> | stockName | HDFC | | | |
| <input checked="" type="checkbox"/> | price | 800 | | | |
| <input checked="" type="checkbox"/> | quantity | 100 | | | |
| <input checked="" type="checkbox"/> | tradeType | Sell | | | |
| <input checked="" type="checkbox"/> | portfolioName | portfolio1 | | | |
| | New key | Value | Description | | |

Body Cookies Headers (6) Test Results Status: 200 OK Time: 661 ms

Pretty Raw Preview JSON

```

1 {
2   "success": true,
3   "message": "Trade added successfully"
4 }

```

<https://portfolio-tracking.herokuapp.com/portfolio/updateTrade/:tradeId> - will update a particular trade



PUT <https://portfolio-tracking.herokuapp.com/portfolio/updateTrade/5beea66f2ccbee12f98b6990> Params Send Save

Authorization Headers (1) **Body** Pre-request Script Tests Code

form-data x-www-form-urlencoded raw binary

| | Key | Value | Description | ... | Bulk Edit |
|-------------------------------------|---------------|------------|-------------|-----|-----------|
| <input checked="" type="checkbox"/> | stockName | RELIANCE | | | |
| <input checked="" type="checkbox"/> | price | 1000 | | | |
| <input checked="" type="checkbox"/> | quantity | 100 | | | |
| <input checked="" type="checkbox"/> | tradeType | SELL | | | |
| <input checked="" type="checkbox"/> | portfolioName | portfolio1 | | | |
| | New key | Value | Description | | |

Body Cookies Headers (6) Test Results Status: 200 OK Time: 504 ms

Pretty Raw Preview JSON  

```

1 {
2   "success": true,
3   "message": "Trade updated successfully"
4 }

```

<https://portfolio-tracking.herokuapp.com/portfolio/removeTrade> - will remove the trade from the database

<https://portfolio-tracking.herokuapp.com/portfolio/addStock> - will add a stock in the databases



POST <https://portfolio-tracking.herokuapp.com/portfolio/addStock> Params Send Save

Authorization Headers (1) **Body** Pre-request Script Tests Code

form-data x-www-form-urlencoded raw binary

| | Key | Value | Description | ... | Bulk Edit |
|-------------------------------------|-------------|----------------------------|-------------|-----|-----------|
| <input checked="" type="checkbox"/> | stockName | ICICI | | | |
| <input checked="" type="checkbox"/> | description | Icici stocks description ! | | | |
| | New key | Value | Description | | |

Body Cookies Headers (8) Test Results Status: 200 OK Time: 1540 ms

Pretty Raw Preview JSON  

```

1 {
2   "success": true,
3   "message": "Stock added successfully"
4 }

```

Deployment

The following project is deployed on Heroku, you can access it through [this](https://portfolio-tracking.herokuapp.com/portfolio) link:

<https://portfolio-tracking.herokuapp.com/portfolio>

You can access the APIs by appending `portfolio/{api_name}/`

Built With

- Node - Server-side programming language
- Express - Node.js web application framework
- MongoDB - A NoSQL Database

Author

- **Umang Govil** - (*umang.govil17996@gmail.com*)