

Financial and Portfolio Manager Website

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Abstract

This project is about a financial and portfolio manager web page where the users can monitor live stock quotes about different international stocks and currencies and also create their own portfolio in order to track down their performance. The website uses up-to-date equity data from the API of Yahoo [1].

- Problem: As a novice investor I look at different web sites every day to monitor the performance of my shares but the layout, design and functionality of these web pages leave much to be desired. Furthermore, some of these portals offer a free portfolio manager but this feature is very poor in order to be able to make a good track of your portfolio. There are some good ones but they are not thorough as I consider a quite powerful portfolio manager should be.
- Objectives: The main goals of my project are to build a dynamic web site with a functional interface, easy to use and understand for beginner investors to watch real equity data. Secondly, they are able to see a chart about every stock to perform technical analysis in order to take a decision about which stocks to buy. Thirdly, to set up some financial calculators such as a currency calculator to know how much your money is worth in the currency of the security and then be able to know how many shares the investor may buy. And finally, to create a good portfolio management tool in order for the investor to create and track the performance of his own portfolio.
- Methodology: The main challenge to build this web site was that I did not have any knowledge in web development, so that before starting building my website I had to struggle studying the different programming languages that are used to build a dynamic web application. The programs that I utilised were HTML, CSS, JavaScript, JQuery, AJAX, JSON, PHP and MySQL.
- Achievements: I consider I have met my goals, achieving a simple financial web portal with a nice interface and design where the users are able to see the most important stock data over 160 international securities and 13 currencies, and building a quite professional portfolio manager tool.