## **Financial and Portfolio** Manager website

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Four are the main parts of my project:

### 1. <u>Watch financial stock quotes</u>

The user can select different kinds of international stocks, currencies or indices, to take a quick look at the most current information about them like the last trade price or the percentage regarding the change in the day previous one. This information is received from Yahoo finance, so that, this data is displayed 20 minutes delay.

### 2. <u>Watch individual equity data</u>

When customer click in the symbol of an equity, the website will display the private page of the asset. It contains a big chart when the user can choose between different periods of time, such as 1 day or 1 year quotes.

There are also three more sections to see more specific information: statistic stock data like year range, financial ratios like PER and technical data like the price of 200 Moving Average.

MARKET WATCH DJIA STOCKS Symbol Name	AAPL or apple SEARCH LIST CALCULATOR PORTFOLIO MANAGER CONTA DJIA DAX) FTSE 100 MAJOR CURRENCIES Last Price Change % Change Time Date	Sign up   Sign in CT Market overview	AAPL or apple SEA MARKET WATCHLIST CALCULATOR PORTFOLIO MANAGER C Apple Inc. AAPL Nasdaq \$ 104.21 -0.12% -0.13 4:00pm 7/29/2016 Apple Inc. AAPL	ARCH Sign up   Sign in XONTACT	AAPL or apple AAPL or apple MARKET WATCHLIST CALCULATOR PORTFOLIO Exchange rate: Price per share in Dolars is: 98 CALCULATE RESET Your investment in Dolars is: 1321.90 Number of shares you can buy: 13.49	SEARCH
AAPLApple Inc.AXPAmerican Express Company ComBABoeing Company (The) CommonCATCaterpillar, Inc. Common StockCSCOCisco Systems, Inc.CVXChevron Corporation Common StoDDE.I. du Pont de Nemours and ComDISWalt Disney Company (The) CommonGEGeneral Electric Company CommonGSGoldman Sachs Group, Inc. (The)HDHome Depot, Inc. (The) CommonIBMInternational Business MachinesINTCIntel Corporation	Sto   133.66   +0.65   +0.49%   4:00pm   7/29/2016     82.76   -0.16   -0.19%   4:00pm   7/29/2016     30.53   +0.01   +0.03%   4:00pm   7/29/2016     oc   102.48   +0.69   +0.68%   4:03pm   7/29/2016     a   69.17   -0.07   -0.10%   4:02pm   7/29/2016     amo   95.95   +0.04   +0.04%   4:01pm   7/29/2016     on   31.14   -0.11   -0.35%   4:00pm   7/29/2016     158.81   -1.72   -1.07%   4:00pm   7/29/2016     S   138.24   +0.28   +0.20%   4:00pm   7/29/2016     160.62   -0.75   -0.46%   4:04pm   7/29/2016     34.86   +0.09   +0.26%   4:00pm   7/29/2016	Name   Last Price   % Change     null   null   null   null     DAX   10337.50   +0.61%     FTSE 100   6724.43   +0.05%     UNILEVER   3533.50   +0.20%     BARCLAYS   154.55   +5.49%     LLOYDS BANKING GRP   53.15   +1.24%     ROYAL BK SCOTL GR   192.40   +2.34%	With the second seco	STATISTICS   Previous Close: 104.34   Days Range: 103.68 - 104.55   Open Price: 104.19   Year Range: 89.47 - 123.82   Bid: 104.25   Year Range: 104.30   Year Range from Year Low: +16.47%   Ask: 104.30   Year Change from Year High: -15.84%   Yolume: 27733688   Ex-Dividend Date: 5/5/2016   Market Capitalization: 261.53B   Dividend Yield: 2.21   Target Price in One Year: 123.86   Dividend Pay Date: 5/12/2016	INTERNATIONAL RETURN PREDICTER   Initial Investment in Local Curreny: 20000 Dollar: USD ▼   Number of shares: 125   Purchase price: 80   Sale price: 88   CALCULATE RESET   Initial Investment in Foreign Currency: 10000   Pound: GBP ▼ Initial Exchange Rate: 0.5000   Final Investment Value 11000 £   Profit or Loss 10000 £ Return in %   Show Chart Show Chart 10 %	Results in Future Exchange: 0.65 16 -30 -3 Sh
	blogies used:	HTML 5				

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### 3. <u>Financial Calculator</u>

There are three kinds of financial calculations the user can do. First, is a currency calculator with the pairs EURUSD, EURGBP and GBPUSD. The second one tell the user how many shares of a foreign company he can buy and how much is his investment in his local currency. Last one is a return predictor to calculate the future return of an investment in different currency regarding the future interest rate to lock in the trade.

	AAPL or apple		SEARCH	Sign up   Sign in
I P M MARKET WAT	CHLIST CALCULATOR	PORTFOLIO MANAGER	CONTACT	
Exchange rate: 1.3219	•			
Price per share in Dolars is: 98				
CALC	CULATE			
Your investment in Dolars is: 1321.9	00			
Number of shares you can buy: 13.49				
INTERNATIONAL RETURN PREI	DICTER			
Initial Investment in Local Curreny:	20000 Dol	lar: USD \vee		
Number of shares:	125			
Purchase price:	80			
Sale price:	88			
	CALCULATE	ESET		
Initial Investment in Foreign Currency	r: 10000 Pou	Ind: GBP 🗸		
Initial Exchange Rate:	0.5000			
			Results in Local Curre	ncy
	Results in Foreign Currenc	y Future Excl	hange: <mark>0.65 C</mark> ALC	CULATE RESET
Final Investment Value	11000 £		16923.08 \$	
Profit or Loss	1000 £		-3076.92 \$	
Return in %	10 %		-15.38 %	
	Show Chart		Show Chart	
GLIERY				





#### 4. International portfolio Manager

The main goal of this section is that the user can create a portfolio of international shares adding their shares they already have and their price to calculate in almost real time the current return of the stock in its quote currency and then the total return of the portfolio regardless the exchange rate.

Furthermore, the user will be able to know the current value, profit and return of each equity and their portfolio in their own currency using the current exchange rate.

Amount Price	
ADD RESET	
portfolio: EDIT	
-	rtfolio %
	25% 25%
,	25%
	25%
	100 %
DLIO VALUE IN LOCAL CURRENCY Investment in Initial exchange Investment in Final value in Final exchange Final value in	T
Investment in Initial exchange Investment in Final value in Final exchange Final value in Foreign rate Local Profit/Lost	Local Return
S 1397.50 0.76 1062.10 1467.50 0.83 1222.91 160.81	15.14 9