
pyrtfolio

Release 0.4

Alvaro Bartolome

Mar 13, 2020

CONTENTS:

- 1 Introduction** **1**
- 2 Installation** **3**
- 3 Usage** **5**
- 4 API Reference** **7**
 - 4.1 `pyrtfolio.Stock` 7
 - 4.2 `pyrtfolio.StockPortfolio` 7
- 5 Contribute** **9**
- 6 Indices and tables** **11**

INTRODUCTION

pyrtfolio is a Python package created based on [investpy](#) data which aims to create custom stock portfolios. In investment, a portfolio is a grouping of financial assets as well as their fund counterparts; note that a portfolio can also consist of non-publicly tradable securities. So on, **investpy** data will be used to create custom portfolios from the data provided by the user such as the asset symbol, purchase date, number of bought shares, etc.

INSTALLATION

In order to get the package working you will need to install it via pip by typing the following command in the terminal:

```
$ pip install pyrtfolio==0.4
```

Every package used is listed in [requirements.txt](#) file, which can also be installed via pip:

```
$ pip install -r requirements.txt
```


USAGE

pyrtfolio usage is pretty simple, since until the current release (0.4), just the StockPortfolios are available with the basic data. So on, the one and only usage that can be currently done with this package consists on generating portfolios for the introduced stocks.

An example will be presented below to show the user how to use the package to generate his/her custom stock portfolios.

```
from pyrtfolio.StockPortfolio import StockPortfolio

portfolio = StockPortfolio()

portfolio.add_stock(stock_name='bbva',
                   stock_country='spain',
                   purchase_date='04/01/2018',
                   num_of_shares=2,
                   cost_per_share=7.2)

portfolio.add_stock(stock_name='endesa',
                   stock_country='spain',
                   purchase_date='13/06/2019',
                   num_of_shares=15,
                   cost_per_share=23.8)

print(portfolio.data)
```

Which outputs the following stock portfolio:

	stock_name	stock_country	purchase_date	num_of_shares	cost_per_share	current_
↪price						gross_current_value
0	bbva	spain	04/01/2018	2	7.2	4.
↪597					9.194	
1	endesa	spain	13/06/2019	15	23.8	23.
↪890					358.350	

Further usage will be documented whenever the package is updated with new features. Make sure to watch and star the repo to be notified about all conversations!

API REFERENCE

4.1 `pyrtfolio.Stock`

4.2 `pyrtfolio.StockPortfolio`

CONTRIBUTE

As this is an open source project it is open to contributions, bug reports, bug fixes, documentation improvements, enhancements and ideas.

Also there is an open tab of [issues](#) where anyone can contribute opening new issues if needed or navigate through them in order to solve them or contribute to its solving. Remember that issues are not threads to describe multiple issues, this does not mean that issues can't be discussed, but if new issues are reported, a new issue should be open so to keep a structured project management.

INDICES AND TABLES

- genindex
- modindex
- search