Using the pmpm package

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1   Global configuration

Global settings are stored in a config file

```
> cat(readLines("~/Trading/pmpm/config.pm2"), sep = "\n")
```

```
## -*- mode: conf; -*-
type: settings
application.dir:  ~/Trading/pmpm
portfolio.dirs:
  ~/Trading/pmpm/German_Equity
  ~/Trading/pmpm/PortfolioOne
report.dir:
HTML.report.dir: www
```

2   About PMPM

PMPM stands for poor manager's portfolio management software.
   Principles

- Simple, but flexible and highly configurable. There should be few dependencies, and simple portfolios should be set up quickly. More-complicated cases, however, should be possible as well.

- Text-based. All input comes in plain-text files; all output is text. So PMPM should work well with software that understands text, so in particular command-line utilities. All settings should be saved in form of simple config files.

Running pm2

One single run, ending in interactive session: creates one object that contain information about all portfolios, to be inspected at will
   Loop: read data, compute reports & publish reports

Portfolio configuration

Metadata for financial instruments

```
> library("pmpm")
> library("orgutils")
> instr <- data.frame(id = c("0001", "0002"),
                      start = NA,
                      end = NA,
                      description = c("A security", "B security"))
> i.file <- tempfile()
> writeLines(toOrg(instr), i.file)
> db <- read_instruments_db(i.file)
```

Install the database.

```
> remove_instruments_db()
> install_instruments_db(db)
```

Show all ids.

```
> id()
```

```
[1] "1" "2"
```

Show some information.

```
> id_info(id()[2])
```

```
2          B security
```

```
> id_search("B")
```

```
[1] "2"
```

```
> id_search("B", field = TRUE)  ## search all fields
```

```
[1] NA
```