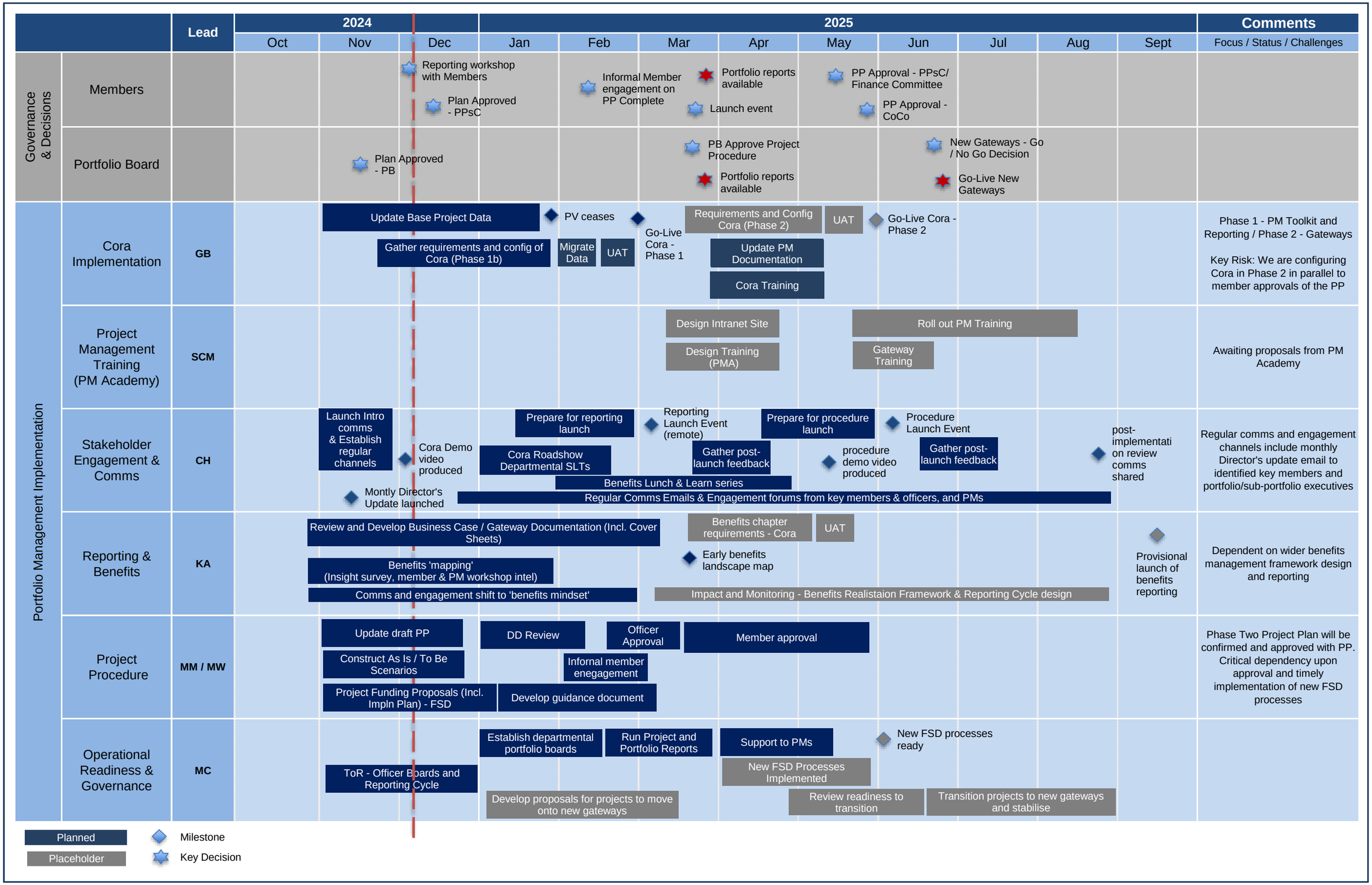Portfolio Management Implementation - Roadmap