MCP SERVER | NO CODE | CLOUD HOSTED

Portfolio CSV Analyzer MCP

Analyze massive broker exports without context window crashes

Portfolio CSV Analyzer processes massive financial exports from brokers like DEGIRO or XTB without crashing your AI client. This MCP streams data locally, preventing context window overload. It reliably extracts the full column schema and provides sample records, giving your agent a clean, safe dataset to analyze complex portfolio performance metrics.

A+ Quality Score 100/100

csv-parsing | data-streaming | financial-data | data-processing | large-file-handling

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vinkius.com/mcp/portfolio-csv-analyzer

SCAN TO VIEW

The connectivity layer between AI and the world's software.

Vinkius sits between AI and every application. All communication passes through Vinkius Cloud via the Model Context Protocol (MCP) — with governance, observability, and security at every layer.

Your AI Connections Run Through Vinkius Cloud

The world's largest managed MCP catalog

Vinkius is the connectivity layer where AI connects to the software your business already runs. We handle the hosting, the security, the credentials, the uptime — you get agents that actually do things.

We operate the world's largest managed MCP catalog. Major SaaS platforms, CRMs, databases, and cloud providers — running, monitored, production-ready. This MCP server is hosted and maintained by the Vinkius Cloud for AI Agents.

> *The agent doesn't manage credentials, doesn't manage uptime, doesn't manage security. Vinkius does.*
>
> — Architecture principle

Four Pillars of the Vinkius Runtime

01 — Security by design

Credentials stay encrypted at rest via AES-256. The AI agent never touches raw keys — they're injected into a sandboxed V8 isolate at runtime. Actions are logged, and connections have an emergency kill switch.

02 — Built on MCP Fusion

This MCP server was built with **MCP Fusion**, the open-source framework (Apache 2.0) that powers the entire Vinkius catalog. Schema-as-firewall strips undeclared fields, compiled PII redaction runs at zero overhead, and cryptographic lockfiles produce git-diffable audit trails.

03 — Deterministic observability

Eight immutable metrics per endpoint: request volume, p95 latency, error rate, active connections, cost attribution. A live payload feed logs every tool call with mutation detection.

04 — Autonomous operations

Servers are deployed, monitored, and patched autonomously. New capabilities and security patches ship weekly. Zero-downtime deployments ensure continuous availability across all managed MCP servers.

AES-256	Ed25519	24h TTL	V8 Isolate
Encryption at rest	PKI vault signatures	Ephemeral session keys	Sandboxed execution

One Token. Instant Access.

Every MCP server on Vinkius is accessed through a **Connection Token**. Tokens are generated in the cloud dashboard and produce a unique MCP endpoint URL. Paste this URL into any MCP-compatible client — no SDK required.

A single token can serve **multiple AI clients simultaneously**, or you can issue separate tokens per client for granular access control. Each token tracks its own request count, last activity timestamp, and can be individually enabled or revoked.

MCP ENDPOINT

```
https://edge.vinkius.com/{token}/mcp
```

Claude · Cursor · VS Code · Windsurf · Grok · Gemini

Security Is the Architecture

Security in Vinkius is not a feature — it's the foundation of the runtime. The gateway enforces multiple independent protection layers between AI agents and third-party APIs.

01 — Ed25519 PKI Vault

Every workspace has an Ed25519 Master Key. Session keys are generated ephemerally (24h TTL) and signed by the Master Key. Credentials never leave the vault boundary.

02 — V8 Isolate Sandboxing

Tool code runs inside isolated-vm V8 isolates with 64 MB memory caps and per-request timeouts. No filesystem access, no network access except through the SSRF-guarded fetch bridge.

03 — SSRF Guard

All outbound HTTP requests are DNS-resolved and validated before execution. Private IP ranges (10.x, 172.16-31.x, 192.168.x, AWS metadata 169.254.x) are blocked at the network layer.

04 — DLP & PII Redaction

A ResponseGuard pipeline intercepts every tool response. Configurable redaction patterns strip sensitive fields (emails, SSNs, card numbers) before data reaches the AI agent.

05 — Cryptographic Audit Trail

Every request is signed into a SHA-256 hash chain with Ed25519 signatures. Events form a tamper-proof, SIEM-exportable forensic record.

06 — Honeytoken Trap System

Phantom credentials are injected into isolated environments. If a honeytoken is used outside Vinkius infrastructure, the server is quarantined instantly.

Emergency Kill Switch

EU AI Act Art. 14(1) Compliant

The kill switch is an **emergency halt** mechanism — not a simple toggle. When triggered, it executes three actions atomically:

01 — Server deactivated

The MCP server is immediately taken offline across the entire cluster.

02 — All tokens revoked

Every connection token is invalidated. Total lockout — reconnection blocked until new tokens are issued.

03 — WebSocket connections killed

Active connections terminated via Redis pubsub broadcast. Propagates to every runtime node in the cluster.

Full Visibility. Zero Guesswork.

The Vinkius cloud dashboard includes a full MCP Governance suite — real-time analytics and security controls for production AI operations.

Control Plane

KPI dashboard with request volume, latency, success rate, token consumption, and AI-generated operational briefings.

Agent Activity

Which AI clients are connecting, how often, and what they're doing — real-time session tracking.

FinOps

Cost tracking per tool, payload compression savings, budget optimization signals, and consumption trends.

Tool Health

Slowest and most error-prone tools, with actionable root-cause insights and performance baselines.

Firewall & DLP

PII redaction activity, sensitive data protection counters, and security event timeline.

Incident Log

Error trends, failure rates, status-code breakdowns, and forensic audit trail access.

> Get started at **cloud.vinkius.com** — connect your AI agent in under 60 seconds.

Portfolio CSV Analyzer MCP

1 tools available
Cloud-hosted on Vinkius

When you download a year's worth of trades from any major broker, the resulting CSV file is huge. If you try to upload that massive dump into your AI client, it will choke—the context window fills up, and the analysis becomes unreliable or just crashes entirely. This MCP changes that. It acts like a local data pre-processor for your agent.

It uses a high-speed streaming parser to read your financial history line by line, all on your machine. Instead of dumping every single row into the chat, it intelligently extracts two things: the exact column headers and a small sample of the data. This gives your AI client the precise schema it needs—like knowing 'Action' or 'Value' exists—without ever overwhelming its memory. You can then safely ask your agent to write aggregation scripts or calculate complex metrics based only on the verified structure. Because Vinkius hosts this MCP, you connect once and get access to reliable data handling for financial reporting.

This process lets you treat multi-gigabyte broker exports like a structured database query, giving you accurate insights instead of context window errors.

Core Capabilities

01 — Determine available columns

You get an immediate list of every column header in your CSV file (e.g., Date, Product, ISIN) so your agent knows exactly what data points exist for analysis.

02 — Generate aggregation scripts

Your AI client can write Python or R code that sums up metrics (like total buys or dividends) using the defined column structure.

03 — Count transaction rows

The MCP counts and reports the exact number of data rows in your entire trading history file, giving you a reliable dataset size metric.

04 — Analyze P&L structure

You can ask the agent to analyze column relationships to calculate profit and loss across multiple trades based on the schema provided.

One Click on Vinkius — From Prompt to Execution

Available at **vinkius.com/mcp/portfolio-csv-analyzer** — connect your AI agent in three steps.

01 Provide the absolute file path pointing to your massive CSV export from a broker (like XTB or DEGIRO).

02 The MCP runs a local, high-speed stream parse on the entire file, reading it line by line without sending everything to the chat.

03 You receive back a clean summary: the full column schema and representative sample data that your AI client can use for safe analysis.

The bottom line is you get structured metadata about huge files, allowing your agent to work with massive financial datasets without running into context window limits.

Built For

This MCP is for financial analysts, quantitative researchers, and portfolio managers who spend too much time wrestling raw CSV data. If you're tired of your AI client crashing every time you upload a year's worth of trades, this is what you need.

Quantitative Analyst

Uses the MCP to validate column structures and generate Python scripts that calculate complex risk metrics across years of transaction data.

Portfolio Manager

Connects the MCP to analyze dividend streams or total cost basis by providing a clean, reliable schema derived from raw broker exports.

Financial Data Engineer

Employs the streaming parser to reliably process large-file financial datasets for downstream database ingestion and structured analysis.

What Changes When You Connect

01 Avoids LLM crashes. Instead of uploading a massive file that exhausts your agent's memory, this MCP streams the data locally and only sends the necessary schema.

02 Guaranteed accurate structure. It automatically detects column headers and data types from complex broker exports, so you don't have to manually map fields for your AI client.

03 Works with huge files. The streaming parser handles CSVs of any size, making it reliable even when dealing with decades of trading history.

04 Safe analysis environment. By providing only the schema and a sample, you ensure that your agent is basing its calculations on verified data structure, not hallucinated context.

05 Directly applicable. Once you run the parse_portfolio_csv tool, your AI client can immediately guide you to write specific aggregation scripts for P&L or total dividends.

Real-World Applications

Calculating Total Dividend Income

A PM downloads a 10-year trade history CSV. Instead of uploading the whole file and hoping it doesn't crash, they run parse_portfolio_csv first. The agent gets the schema and sees 'Description' is the dividend column, allowing it to write the exact summing script needed.

Validating a New Broker Export

A Data Engineer receives an export from a new broker they haven't seen before. They use parse_portfolio_csv to immediately check for all available columns and confirm if the required 'Action' column is present, saving hours of manual data cleaning.

Auditing Transaction Counts

A Quant needs to know the exact total row count for a regulatory report. They run parse_portfolio_csv, and the tool immediately reports the precise number of transaction rows (e.g., 4,521), providing an auditable metric instantly.

Comparing Multiple Broker Exports

A PM has three different CSVs from different years/brokers. They run parse_portfolio_csv on each one to get a consistent schema for all of them, allowing the agent to compare performance metrics across disparate data sources safely.

Patterns to Avoid

Uploading raw CSVs directly

✗ AVOID

Trying to feed a 50MB broker export straight into your AI client because you think it can 'read' the whole thing.

✓ INSTEAD

Run parse_portfolio_csv first. This tool reads the file locally, extracts the necessary schema and sample data, and gives your agent a manageable, safe context for deep analysis.

Guessing column names

✗ AVOID

Asking the AI to calculate 'Total Value' without knowing if the broker uses 'Value', 'Amount', or 'Net Change' in its export.

✓ INSTEAD

Always use parse_portfolio_csv. The tool exposes all available headers, confirming exactly what columns are present for calculations.

Relying on hallucination

✗ AVOID

The AI client giving you a partial or incorrect calculation because it ran out of memory and started guessing based on the file's start.

✓ INSTEAD

Use this MCP. It streams the data to prevent context overflow, ensuring your agent works only with verified column schemas derived from the full dataset.

The Right Fit

Use this MCP if your primary pain point is processing large-scale financial CSV exports (over 10MB) that threaten to crash or overload your AI client's context window. It's essential when you need reliable, structured metadata before running complex queries. Don't use it if you just have a small, clean spreadsheet; those files can be uploaded directly. Similarly, don't use this if you only need basic text summarizing—this tool is purely for schema and data structure extraction. You must process the file first via parse_portfolio_csv before asking your agent to perform any calculation or generate code.

The hassle of giant brokerage exports

Today, if you want your AI client to analyze a year's worth of trades from DEGIRO or XTB, you have to download the massive CSV file. Then you hit 'upload.' Within moments, that sheer volume of data overwhelms the model, causing context window limits. You end up with either an outright crash or an analysis that ignores huge chunks of your history.

With this MCP, you simply point it at the export file. It runs the parsing locally, extracting only the column structure and a small sample. Now your AI client gets exactly what it needs—the blueprint for your data—without ever seeing the thousands of lines of raw text.

Get accurate metrics with parse_portfolio_csv

You eliminate the manual step of opening the file, scrolling through columns, and trying to remember if 'Amount' means gross or net. The tool handles the heavy lifting of identifying every single header and data type for you.

What changes is that your agent now has a stable, verifiable foundation. It doesn't guess; it calculates based on the schema provided by parse_portfolio_csv.

Portfolio CSV Analyzer MCP: 1 Tool Available

Use the available tools here to process massive financial data, extract column schemas, and prepare your raw broker exports for accurate AI analysis.

#	TOOL	DESCRIPTION
01	`parse_portfolio_csv`	Reads massive CSV exports from brokers (DEGIRO, XTB, Trading212) locally to return the column schema and a data sample for safe AI analysis.

See It in Action

Real prompts you can use once this MCP is connected to your AI agent through Vinkius Cloud.

U Parse my DEGIRO_export.csv and tell me what data columns I have available to calculate my total dividends.

Based on the CSV schema, you have the following columns: Date, Product, ISIN, Description, and Amount. The 'Description' column labels your dividends.

U Look at the schema of this broker export and write a Python script for me that sums up all my buy orders.

Here is a Python script using pandas that targets the 'Action' and 'Value' columns we just discovered in your CSV file.

U How many total rows are in this trading history CSV?

The streaming parser counted exactly 4,521 rows of transaction data.

Frequently Asked Questions

01 **Does Portfolio CSV Analyzer handle all broker exports?**

Yes. This MCP is designed to take massive, messy CSV files from any major brokerage (like DEGIRO or XTB) and process them reliably.

02 **How does parse_portfolio_csv prevent context window issues?**

It uses local streaming technology. Instead of sending the entire file content to your AI client, it reads it line by line on your computer and only sends the clean schema and a sample.

03 **Can I use this MCP for non-broker CSV files?**

The tool is optimized for financial exports. While it handles general CSV structures, its primary strength lies in reliably parsing complex trading history data.

04 **What information do I get back after running parse_portfolio_csv?**

You receive two key things: the complete list of column headers (the schema) and a small, representative sample of the actual data rows. This gives your AI client everything it needs to start.

05 **Is this MCP secure for private financial data?**

Yes, because the core parsing is done locally on your machine; only the structured schema and a small sample are passed to your agent, keeping the bulk of your raw data protected.

Go Live in 60 Seconds

Get your connection token from **cloud.vinkius.com**, then paste the endpoint URL into any MCP-compatible client.

YOUR MCP ENDPOINT

```
https://edge.vinkius.com/[TOKEN]/mcp
```

CLIENT	WHERE TO CONFIGURE
Claude AI	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
Cursor	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
VS Code	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add `"portfolio-csv-analyzer": { "url": "…" }`
Windsurf	MCP Settings → `mcp_settings.json` → Add endpoint URL
ChatGPT	Settings → Tools & plugins → Add MCP server → Paste endpoint
Gemini	Extensions → Add MCP Server → Paste endpoint URL

ASK AN AI ABOUT THIS

Let your preferred AI explain this MCP server

- Ask ChatGPT
- Ask Claude
- Ask Perplexity
- Ask Gemini
- Ask Grok

READY TO CONNECT

Portfolio CSV Analyzer is live on Vinkius Cloud.

Get your connection token, paste it into your AI agent, and start building. No SDK. No deployment. Just results.

Start at cloud.vinkius.com →

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