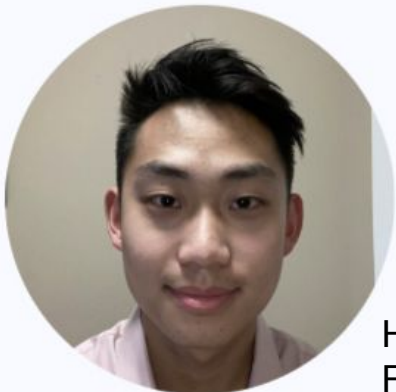


Investment Grade

ENSE477 - Vlog 4

Erika McCluskey, Hayden Jin

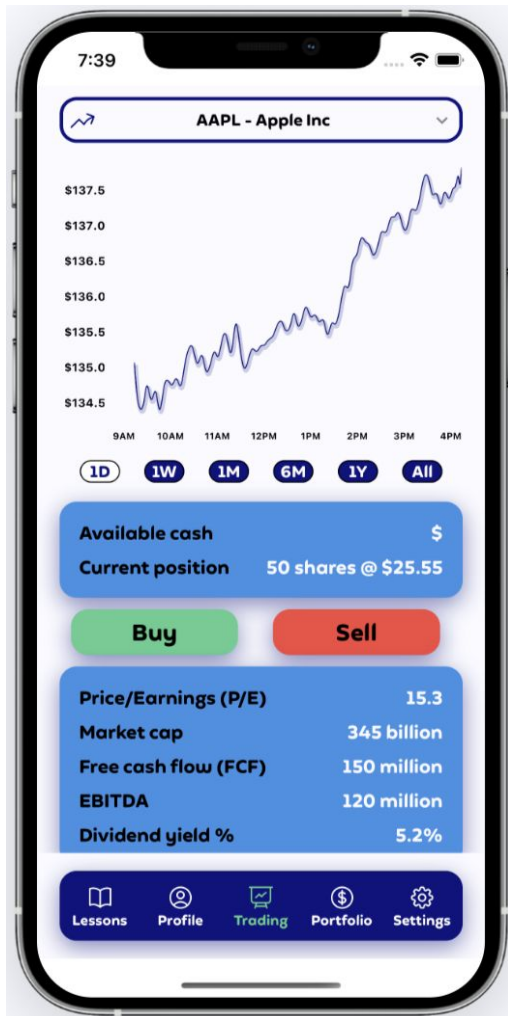
Team



Hayden Jin
Full stack developer

Erika McCluskey
Full stack developer





Solution

Money and investing is a scary concept to many, as there is just so much to know. Our goal is to make it fun and easy.

Through the power of gamification and habit building, we aim to create a platform which provides adequate financial education to those who have been let down by traditional education systems.

Our application has two primary features: lessons with interactive quizzes and paper trading. Daily lessons will encourage users to form healthy habits of learning while the paper trading section will allow users to apply their newly acquired knowledge.

An Issue Prevalent Throughout North America

US Financial Literacy at a Glance

25% of Americans say they **don't have anyone they can ask** for trusted financial guidance.



In 2021, Americans reported **losing an average of \$1,389** because of a lack of personal finance knowledge.

60% of non-retirees **didn't think their retirement savings were on track** in 2021.



In 2021, 34% of U.S. adults reported that **"just getting by financially"** describes them completely or very well.

<https://www.annuity.org/financial-literacy/financial-literacy-statistics/>

80%

of Canadians believe they have poor financial literacy skills

<https://mnpdebt.ca/en/resources/mnp-debt-blog/financial-literacy-in-canada-lack-of-skills-and-education-contributing-to-surging-consumer-debt>

177%

average Canadian household debt to disposable income in 2019

<https://www.canada.ca/en/financial-consumer-agency/programs/research/canadian-financial-capability-survey-2019.html>

73%

of Canadians have some type of outstanding debt

<https://www.canada.ca/en/financial-consumer-agency/programs/research/canadian-financial-capability-survey-2019.html>



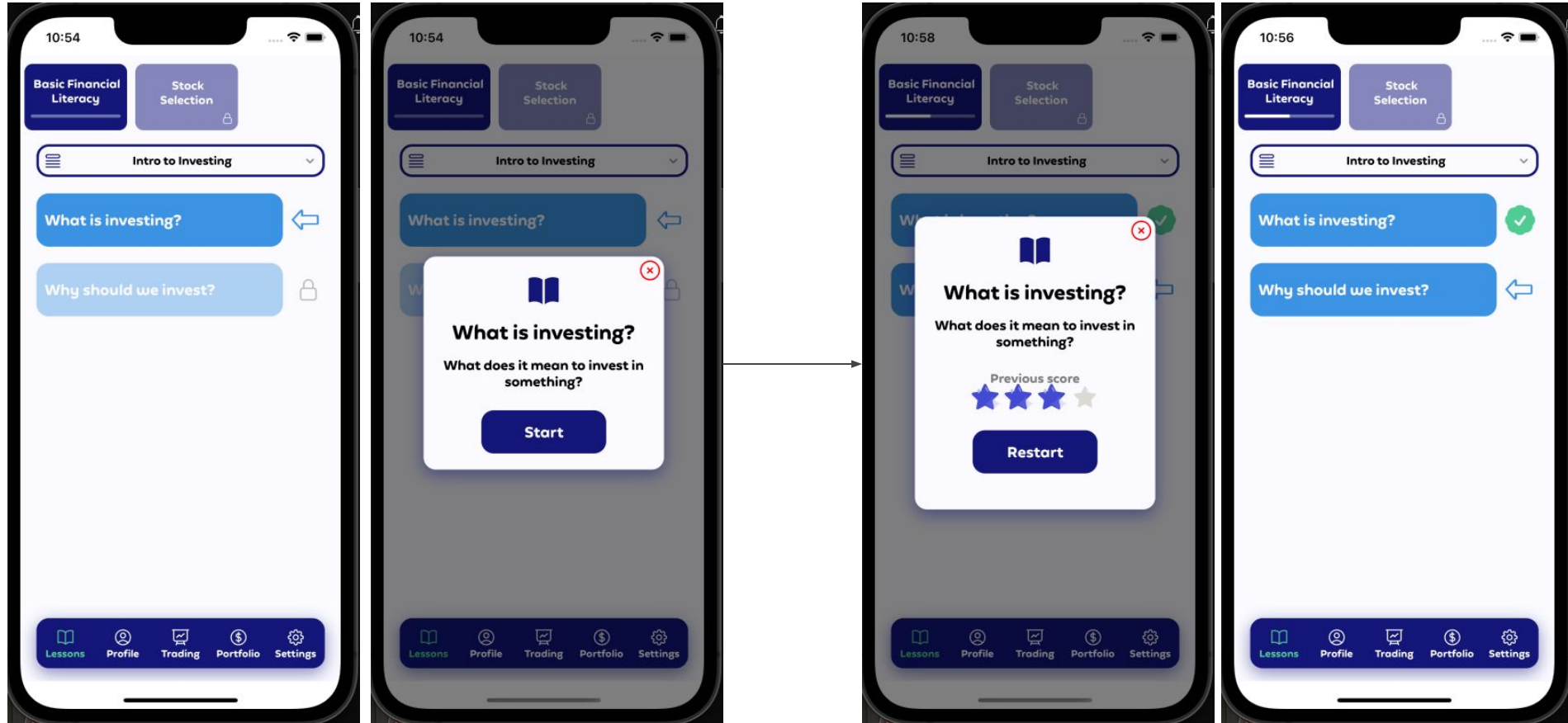
Demo

Recap of status on last vlog...

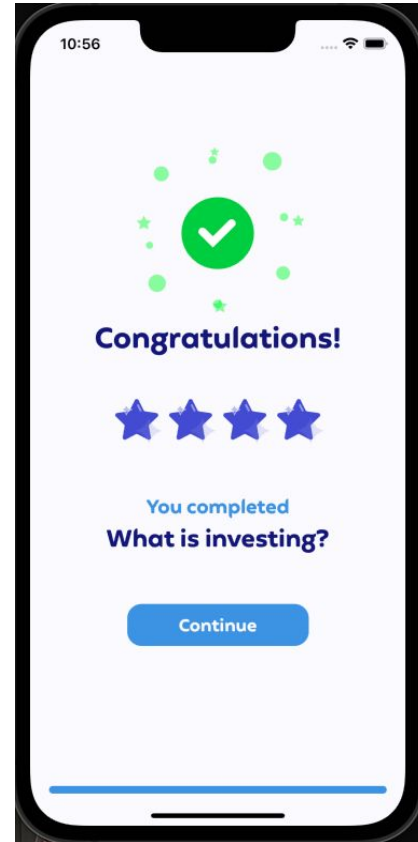
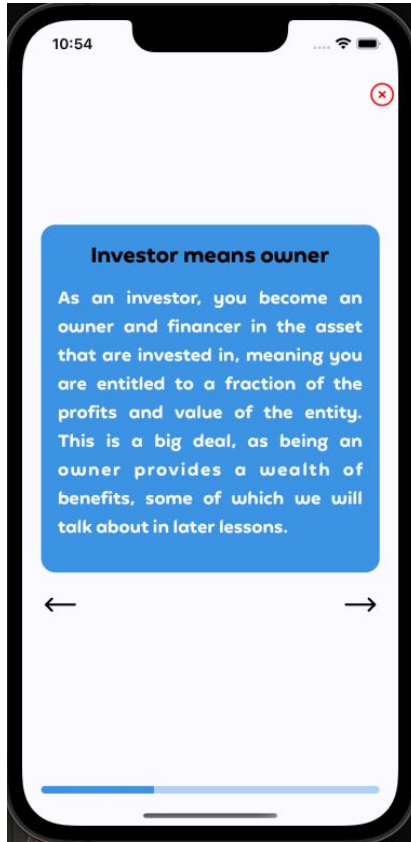
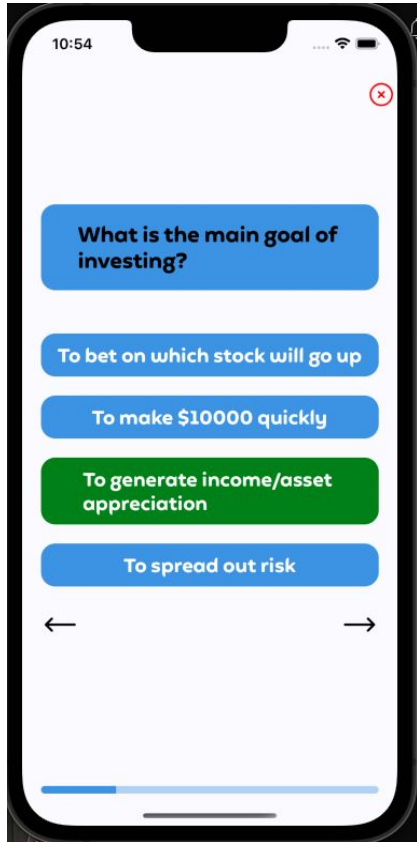


- Static data
- Character (retired)

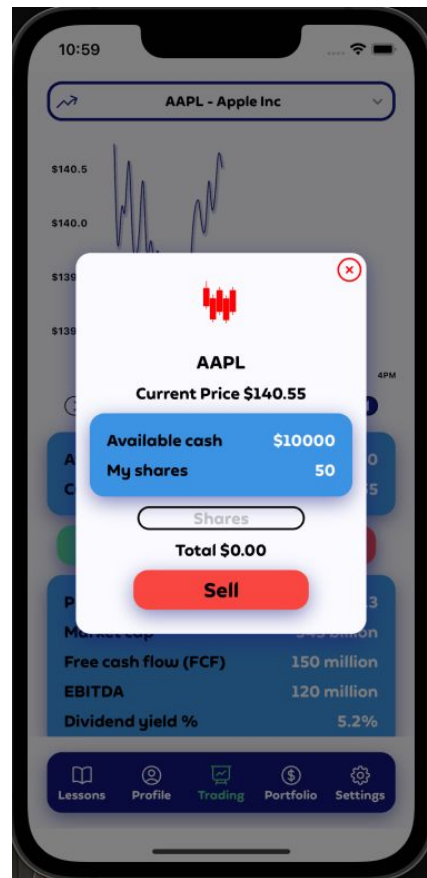
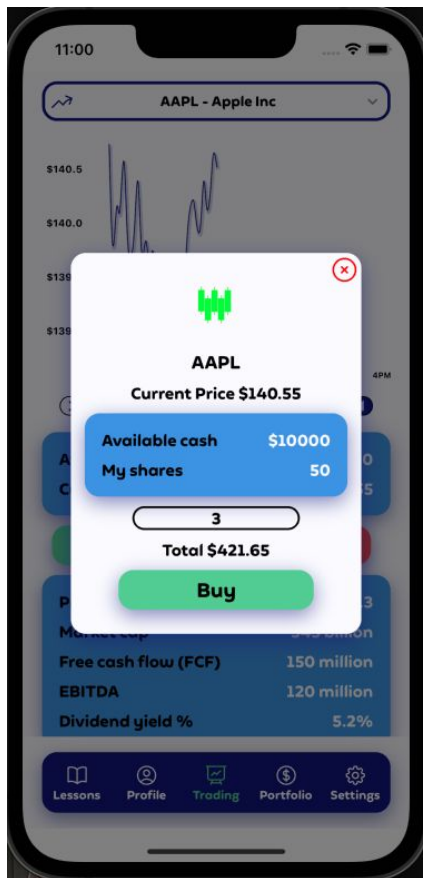
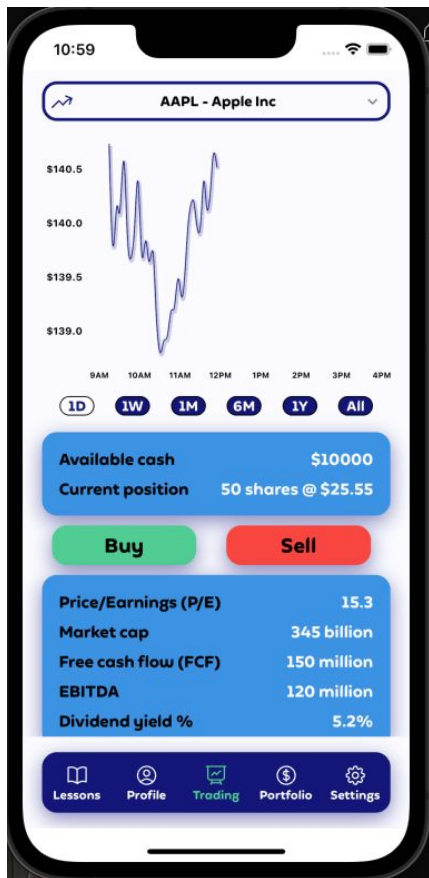
Now... (Lessons)



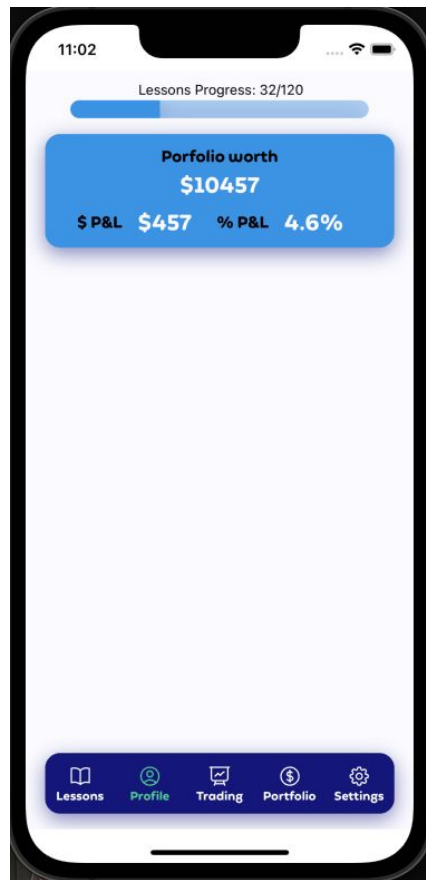
Now... (Lessons)



Now... (Trading)



Now... (Portfolio & Profile)



Status



- Lots of progress in the last month
- Almost done MVP 1
- We have time to improve



Scrum board

View 1 + New view

Filter by keyword or by field


Retired? 3	Backlog/sticky 9	Todo 15	In Progress 5	Done 50
<div>Draft ... how to get animated character</div>	<div>Draft Make as many things animated as possible</div>	<div>Draft number of shares input not resetting</div>	<div>Draft Create modal for buying and selling</div>	<div>Draft Create cards for portfolio page</div>
<div>Draft Create your character</div>	<div>Draft verify roles and permissions for aws rds and lambda</div>	<div>Draft Render other timeframe data on chart</div>	<div>Draft Finish rest of trading page</div>	<div>Draft show user what lesson they're on with arrow</div>
<div>Draft on user sign up, add basic financial literacy section to owned section</div>	<div>Draft Create a tutorial for new users?</div>	<div>Draft Notifications / streak</div>	<div>Draft Create and add backend functionality for trading</div>	<div>Draft enable the uncompleted lesson after the completed lesson</div>
	<div>Draft free tier to paid tier changes</div>	<div>Draft profile page front-end implementation</div>	<div>Draft add order model and initial routes to db</div>	<div>Draft remove x button from final completion lesson</div>
	<div>Draft add star result under lesson name</div>	<div>Draft carry over email from signup to verification</div>	<div>Draft close lesson modal x button styling fix</div>	<div>Draft if lesson completed but no score, should say restart</div>
	<div>Draft remove background URL from Courses model</div>	<div>Draft extend background colour to all the way to the top/bottom</div>		<div>Draft completed lesson badge not showing complete right after when closing lesson modal</div>
	<div>Draft add number of lesson retakes to lessons</div>	<div>Draft add route to delete everything belonging to a section</div>		
+ Add item	+ Add item	+ Add item	+ Add item	+ Add item

+ Add item

Consistent

Documentation Public
☆ 0 🍴 0 🕒 0 🔗 0 Updated now

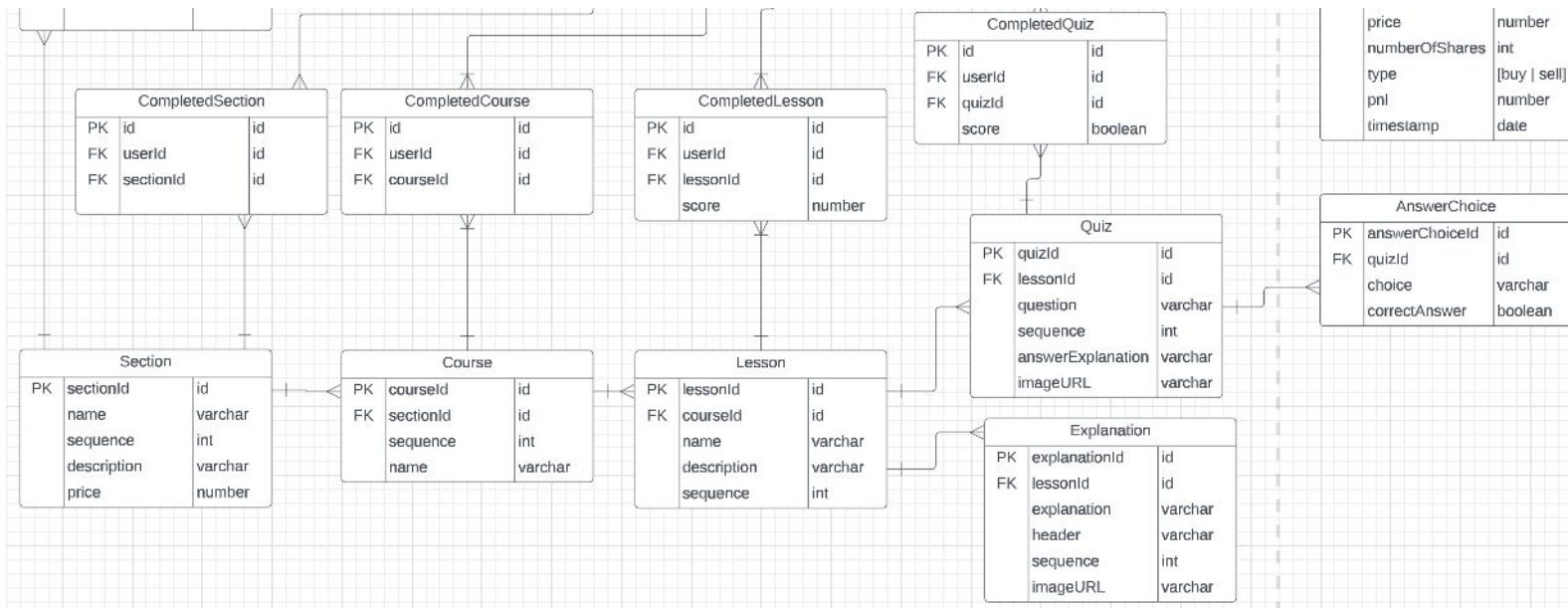
Learn-to-Invest Private
● TypeScript ☆ 0 🍴 0 🕒 0 🔗 0 Updated 19 hours ago



- Very consistent commit history
- Working at a good pace
- Keeping documentation updated

Dynamic

- Lots of focus on making things as dynamic as possible
 - Adding lessons, courses, modules
 - Creating a script to insert courses (10 tables for one lesson)



Changes

- Added another 'division' to our courses (ie. modules)
 - Separating topics (basic financial literacy, stock picking, passive investing)
- More thought into monetization
 - Designing our backend to easily adapt
- Important to add a social aspect to the app (adding this to MVP)
 - Friends, looking at other portfolios, leaderboards



Changes from feedback

- Adding basic financial literacy
 - And other modules (opportunity for more lessons + monetization)
- Don't make it look too childish (still want users to take info seriously)
 - Maybe not a great idea for everything to be purple
- What is the incentive to keep doing courses? Coming back?
 - Streaks, leaderboards, friends



The background is a solid pink color. In the top right corner, there is a decorative pattern of overlapping geometric shapes, including triangles and squares, in various shades of pink and magenta.

Thank you!