User Personas for StockSprout

Persona 1: Alex Chen – The Enthusiastic Finance Student

Demographics

- Age: 20 years old
- Location: Toronto, Ontario, Canada
- Occupation: Third-year Business Finance major at York University
- Education: Currently pursuing Bachelor of Business Administration with Finance concentration
- Income: $15,000/year (part-time retail job + parental support)

Background & Context

Alex is a finance student who has studied financial markets and investment principles. Although academically sound (3.7 GPA), Alex has no hands-on trading experience and is frustrated by the disparity between theoretical work in books and actual implementation. Alex is a recent member of the university investment club but is intimidated by fellow students with prior trading experience.

Goals & Motivations

- Primary Goal: Gain hands-on experience with trading to supplement academic studies
- Secondary Goals:
    - Prepare for future internship interviews at finance firms
    - Compete in university investment clubs
    - Understand how psychology and market sentiment influence trading choices
    - Practice portfolio management and risk analysis

Pain Points & Challenges

- Fear of loss of money: Wants to practice but can't risk real trading losses on student budget
- Information overload: Overwhelmed by technical professional trading platforms

- Lack of guidance: Needs structured learning process instead of trial-and-error process
- Time constraints: Balancing classes with part-time job restricts learning time
- Peer pressure: Wants to keep up with more senior classmates

Technology & Platform Preferences

- Primary devices: iPhone 14 and MacBook Air
- Usage patterns: Heavy mobile during classes, desktop for in-depth research
- Social media: Active on Instagram, LinkedIn, Discord for study group
- Learning style: Visual learner who likes interactive content and step-by-step tutorials

Behavioral Patterns

- Research habits: Reads daily financial news, follows finance personalities on social media
- Risk tolerance: Conservative based on lack of experience and student budget constraints
- Decision making: Deliberate, likes to do research carefully before making decision
- Collaboration: Loves group work and peer discussions on strategies

StockSprout Usage Scenarios

1. Class Assignment: Uses platform to do semester-long portfolio management project
2. Investment Club: Competes in club competitions and strategy discussions
3. Interview Prep: Practices trading exercises to discuss in internship interviews
4. Self-Learning: Completes educational modules during study break

Success Metrics

- Better understanding of trading fundamentals
- Greater confidence in financial decision-making
- Improved performance in academic finance classes
- Successful completion of internship applications

Persona 2: Sarah Mitchell – The Experienced Strategy Tester

Demographics

- Age: 35 years old
- Location: Vancouver, British Columbia, Canada
- Occupation: Senior Financial Analyst at mid-sized investment firm
- Education: MBA in Finance, CFA Charter holder
- Income: $95,000/year

Background & Context

Sarah has 12 years of experience in financial analysis and portfolio management. She manages client accounts worth $50M+ and has an excellent track record of conservative, consistent returns. Nevertheless, she is interested in experimenting with more aggressive trading strategies as well as alternative investment strategies, but is unable to risk client funds for strategy testing.

Goals & Motivations

- Primary Goal: Test new quantitative trading strategies without risking client capital
- Secondary Goals:
    - Pre-implementation validation of algorithmic trading models
    - Monitor market movements and new trading techniques
    - Train junior staff on her team
    - Maintain continuing education and professional development requirements

Pain Points & Challenges

- Professional risk: Cannot test untested strategies with client capital
- Time for experimentation: Busy schedule leaves little strategy development time
- Platform limitations: Current firm's systems are not conducive to easy backtesting of strategies
- Regulatory limitations: Compliance regulations limit ability to experiment with new methods
- Team training requirements: Difficulty in finding appropriate training tools for junior staff

Technology & Platform Preferences

- Main devices: Dell workstation in office, iPad Pro for remote access
- Patterns of use: Mostly desktop at the workplace, mobile for evening research
- Professional tools: Bloomberg Terminal, Excel, Python used for analysis
- Communication: Slack for team organization, LinkedIn for professional networking

Behavioral Patterns

- Research practices: Reads professional financial publications, attends finance conferences
- Tolerance for risk: Moderate to high, but very conservative with client capital
- Decision style: Data-driven, relies heavily on quantitative analysis
- Leadership style: Mentoring-style, enjoys teaching and developing others

StockSprout Usage Scenarios

1. Strategy Development: Tests new quantitative models over intervals of 3-6 months
2. Team Training: Creates customized scenarios for training junior staff
3. Professional Development: Uses platform to satisfy CFA continuing education credits
4. Client Presentations: Explains strategy concepts to clients using simulations of history Successfully Implemented

Success Metrics

- Successfully validated at least 2 new trading strategies per annum
- Enhanced team performance and skill gain
- Improved client satisfaction through more detailed explanation of strategy
- Maintained professional certifications and designations

Persona 3: Dr. Robert Kim – The Finance Educator

Demographics

- Age: 45 years old
- Location: Calgary, Alberta, Canada

- Occupation: Associate Professor of Finance, University of Calgary
- Education: PhD in Financial Economics, University of Toronto
- Income: $87,000/year

Background & Context

Dr. Kim teaches undergraduate and graduate finance courses for 15 years. He instructs investment analysis and portfolio management courses with 150-300 students per semester. While academically well-qualified with 40+ published papers, it is not easy for him to bridge the practice-theory gap for his students.

Goals & Motivations

- Primary Goal: Provide students with practical, real-world trading experience in addition to theoretical knowledge
- Secondary Goals:
    - Increase student participation and satisfaction scores
    - Create realistic assessment tools to measure practical ability
    - Develop innovative methods for teaching financial concepts
    - Explore behavioral finance and learning impact

Pain Points & Challenges

- Student participation: Lectures do not resonate with digital-native students
- Assessment limitations: Difficulty in creating practical exams to measure real-world capability
- Platform limitations: Current platforms are either too simple or too complicated
- Resource limitations: University budget restricts access to professional platforms
- Time management: Large enrollments make individual feedback difficult

Technology & Platform Preferences

- Primary equipment: University-issued Windows laptop, personal iPad
- Usage patterns: Desktop for homework preparation, mobile/tablet for classroom activities
- Educational resources: Blackboard LMS, PowerPoint, Excel for demonstrations
- Communication: University email, Zoom for office hours and remote lecture

Behavioral Patterns

- Teaching style: Interactive lectures incorporating real-world examples and case studies
- Technology adoption: Moderate early adopter, receptive to new education technology
- Assessment strategy: Prefers practical assignments over traditional exams
- Professional development: Attends academic conferences, collaborates on research projects with peers

StockSprout Usage Scenarios

1. Course Integration: Creates semester-long trading competitions for 25% of final grade
2. Lecture Demonstrations: Utilizes live trading examples for class presentations
3. Research Projects: Performs behavioral finance research using anonymized student data
4. Professional Development: Presents teaching innovations at academic conferences

Success Metrics

- Improved student course reviews (target: 4.5+/5.0)
- Increased student involvement and participation
- Successful research articles on financial education
- Acknowledgment of innovative teaching methods within university