**EduTech**

The purpose of EduTech is to educate investors about the securities market and how to trade securities or invest in securities with proper risk management. These contents can be in the form of articles, videos, info-graphics, or interactive simulations.

The main goal is to

* Communicate basic idea of investment to consumer
* Help user identify negative connotation
* Direct investment decision

**Customer Interface**

**Under EdTech option user will see the list of Broad Categories. Broad categories may include:**

|  |  |
| --- | --- |
| **Category** | **Keywords/ Tags** |
| **KW-Library (Know What Library)** | Each content will have some predefined keywords or tags. These keywords will help find topics related to users’ search. Also based on users’ trading behavior, user will be suggested contents based on these tags. |
| **Ideas and Opinions**  Blog (inclusive of expert opinions and expert analysis) |
| **Podcast** |
| **Simulation** | Dummy trading games |

**Other:**

1. Comment (Sign in required)
2. Search Bar
3. Certificate
4. KW-Library (Know What Library): Under Library, a category preview will be shown. For example:
5. **Stock market basics**
6. **Stock market analysis**
7. **Investing strategies**
8. **Personal finance**

While user chooses a category, user will see predefined list of Titles of contents for that category and a brief summary/ overview associated with the content

**Stock market basics**

Do you make enough money to secure your future expenses? Is inflation eating away your savings? Do your dreams discord with your financial reality? Well...you may already know why to invest.

Why should you invest?

If money’s a source of worry in your life, you’re not alone. But, when you approach money management and financial planning in a planned way, it can help set you up for a bright and successful future.

Personal Finance Math (Part 1)

Introduction to Personal Finance

Making financial decisions can be intimidating, especially if you're just starting to manage your own money. But don't worry. All you need is to understand some basic Math.

User can select the title and will see detail content. Content may include:

1. Images
2. Videos
3. Podcasts

[User may not want to scroll too much. So, the details may need to be shortened or broken into multiple cards. User can swipe cards right to see next information on the same topic.]

At the end of each **content**, there will be option for comment. User will have to sign in using mail id or sign up, if not already signed up.

At the end of each **category**, there will be quiz for user. To be certified, user have to complete all the quizzes along with the completion of content.

### 2.0 Ideas and Opinions

There might be categories for

1. Blog
2. Expert Analysis & Opinion

While user chooses a category, user will see predefined list of Titles of contents for that category and a brief summary/ overview associated with the content

User can select the title and will see detail content. Content may include:

1. Images
2. Videos
3. Podcasts

At the end of each content, user might have option to rate the content (will require sign in).

[User may not want to scroll too much. So, the details may need to be shortened or broken into multiple cards. User can swipe cards right to see next information on the same topic.]

At the end of each **content**, there will be option for comment. User will have to sign in using mail id or sign up, if not already signed up.

**3.0 Podcast**

Podcast window will have list of playlist/ link. Each podcast content will have a short description and Speaker Name and at the end there will be a Play/ Direct to Link button. User will click the play button and the podcast will be played. If Direct to Link, User will be directed to content creators original site.

**4.0 Simulations of trading**

The prime reason of simulation is to provide user first-hand experience about trading, make them curious and involve them in trading.

**Progress bar**

Based on the card under each content, user access and stays for a certain amount of time. For example: under “Personal finance”, there are 10 cards. If user access 5 cards and stays for a certain amount of time in each card, user will be shown 50% progress for “Personal finance”.

**Search bar**

Bar at the top right of the window. Match searched keywords with Tags of content and suggest matched contents.

**Share**

Each content will have share option so that user can share in Social Media and other E-Learning platforms.

**Comment**

At the end of each content, user may add a comment or reply to a comment. To comment, user will have to sign in using mail id or sign up, if not already signed up.

**Sign up**

If User has BO account with IDLC, Sign in using the following fields:

* BO account

Or,

* Mail associated with BO account
* Password

A message above the Sing up option “For better content suggestion, please sing in using information associated with BO account with IDLC”

Else, Sign up using the following fields:

* Signup with google or Facebook

**Quiz**

At the end of each content, an option will be provided “Take the Quiz”. There will be 5/10 quizzes. Quizzes will be uploaded with the content. After answering all the quizzes, user will be able to see the result of the quiz. User may take the quiz at most 3 times. Each question will be marked 10 points. User have to score 60%, to pass the quiz. If user has already attempted once and re-enter, his last attempt result “Passed/ Failed” will be shown alongside number of attempts taken.

**Query Pop-up**

To identify users’ demography, who is not IDLC client but visitor of site and singed up in EduTech account, push a query after certain days asking following information:

Age Range, Profession, Income level, Interest.

**Certificate**

User will be given a certificate of completion of EduTech content if he completes all the quizzes.

**Profile**

1. Progress: User will be able to see progress in contents.
2. Open i-Trade account: An option that will lead to account opening page.
3. Referral: Refer the EduTech to families, friends etc.
4. Logout option

**Back Office**

For KW Library and Ideas and Opinions, Category and contents needs to be editable. So, there should be option to:

1. Add new category/ contents.
2. Edit/ Delete existing category/ contents [a confirmation required before saving the edit or deleting the category/ contents]

**Content**

Should have options to add **at any position of the content**/ modify:

1. Text
2. Image
3. Video
4. Audio/ Podcast
5. Hyperlink

[\*\*NOTE: There should be option to link a segment of content “N” to a segment of content “A”, alike Hyperlink.]

1. Link (YouTube, Individual podcast site etc.)
2. Quiz
3. Tags/ Keywords [Not visible to user. Will be stored in the database.]

Ask feedback on content “Was it helpful?” YES/ NO

**Content Dashboard:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Content Code | Category | Content Title | Tags/ Keywords | Edit/ Delete Option |

**Comment Dashboard:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Sl. | Content Title/ Code | Comment | Admin Reply | User Name | User Mail | Edit/ Delete Option |

**Content Suggestion to User**

System will analyze users’ trading behavior and searched query. Based on users’ trading behavior and searched query pattern, the system will push relative content to users’ screen whenever user enters EduTech section.

1. Each content will have certain tags/ keywords (Content Tag) associated with it. [Uploader of the content will add the tags]
2. From trading behavior analytics, tags (TB Tag) will be defined for user. [Tags need to be same with content tag.]
3. System needs to match the TB Tag with Content Tag and for matching Tag, contents will be suggested to user.
4. If system have users demographic data, based on demography like age, push content.
5. If user spends a particular amount of time in EduTech content, based on his high read time contents, push content of similar types.
6. Similarly from searched query, have to identify keywords that match with the contents tags. Then push the matched content to users’ window.

**Sign up**

Initially when user inputs mail, check if this is an existing account in EduTech. Do not allow duplicate sign up.

|  |  |  |  |
| --- | --- | --- | --- |
| Sl. | User Name | User Mail | Content Code |

Content code is to suggest similar type of content to user.

Check if user mail matches with existing client. If not, forward user info to Lead Manager.

User may signup using different mail than his/ her mail used to create BO account.

So for Sign Up, initially ask “Do you already have i-Trade account? If yes, sign in using the same mail id to get better content suggestion.”

Or,

Give user Yes/ No option with the question. If user selects yes, provide login option using BO account. If user selects no, provide signup option using

* Name
* Mail: verification required.