

Intermediate User - Financial Expert  
Name: Aisha Malik  
Occupation: Financial Analyst

"I don’t need fancy features; I just need accurate data and clear charts to make quick decisions."

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| User Information | | |
| User Story | As a financial analyst, Aisha wants a straightforward way to track stock prices and compare trends so she can make informed investment recommendations for her clients. | |
| User Scenario | Aisha is preparing a quarterly investment report. She needs to compare the stock performance of two competitors over the past year. She logs into the application, enters the stock symbols, selects the date range, and generates a comparison chart. After analysing the data, she exports the report to present to her team. | |
| Demographic information | | |
| Age | 32 | |
| Gender | Female | |
| Location | London, UK | |
| Tech Skills: | Moderate (Excel, financial software, but limited coding experience) | |
| Financial Knowledge: | High (stock market analysis, portfolio management) | |
| Needs and motivations | | |
| Motivations | | Frustrations |
| * Making data-driven investment decisions efficiently * Saving time with quick and clear stock price comparison * Ensuring accurate financial reporting * Staying ahead of market trends | | * Finds some financial tools too overly complex and expensive * Gets frustrated when data isn’t up to date or when there’s limited historical data * Prefers clear visualizations of data over raw numbers |
| Goals | | Environment |
| * Easily track and compare stock prices * Export high quality reports * Access historical data in an easy-to-read format | | * Works in an office with multiple screens * Uses a Windows laptop and sometimes a tablet * Often on the move and needs access to stock data via phone |



Experienced Software Engineer – FinTech Developer  
Name: James Carter  
Occupation: Senior Software Engineer (FinTech)  
  
"If your app doesn’t have a solid API, I’m not interested."

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| User Information | | |
| User Story | As a software engineer, James wants an application with a well-documented API and customizable features so he can integrate stock data into his own financial tools. | |
| User Scenario | James is developing a personal finance dashboard and needs real-time stock data to track, buy, and sell shares programmatically. He checks the application’s documentation, writes a quick script to retrieve stock prices, and integrates the API into his system. Within minutes, his dashboard is fetching livestock data, executing automated trades based on predefined conditions, and analysing market trends. | |
| Demographic information | | |
| Age | 27 | |
| Gender | Male | |
| Location | New York, USA | |
| Tech Skills: | High (Java, API development, cloud computing) | |
| Financial Knowledge: | Medium (understands stock markets but isn’t a professional trader) | |
| Needs and motivations | | |
| Motivations | | Frustrations |
| * Wants to work with clean architecture and efficient APIs * Prefers open-source or extensible platforms * Aims to streamline stock trading through automation | | * Hates dealing with poorly documented APIs * Finds hardcoded limitations restrictive * Prefers a fast and efficient backend over fancy UI |
| Goals | | Environment |
| * Integrate stock data seamlessly into his financial software * Customize the application to suit his needs * Ensure the system is efficient and scalable * Automate stock buying and selling with minimal manual effort | | * Works on a MacBook Pro with Linux virtual machines * Uses VS Code, Postman, and GitHub everyday * Frequently switches between local and cloud environments |

Skilled User – Experience in Finance & Tech  
Name: Omar Khan  
Occupation: Investment Manager with IT Background  
  
"If I can’t access my data quickly, I lose money. Simple."



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| User Information | | |
| User Story | As an investment manager, Omar wants an application that provides automated stock alerts and customizable dashboards so he can efficiently track multiple investments. | |
| User Scenario | Omar is managing his clients’ portfolios. He sets automated alerts for specific stocks. When a company’s stock drops by 5%, he gets notified instantly, reviews the comparison chart, and makes a decision before calling his clients. | |
| Demographic information | | |
| Age | 40 | |
| Gender | Male | |
| Location | Dubai, UAE | |
| Tech Skills: | Moderate (SQL, Python for finance, cloud-based tools) | |
| Financial Knowledge: | High (portfolio management, risk assessment) | |
| Needs and motivations | | |
| Motivations | | Frustrations |
| * Keeping clients’ investments profitable * Having real-time insights into stock market movements * Minimizing manual effort while maximizing accuracy | | * Finds dashboards cluttered with unnecessary info * Gets frustrated with slow-loading financial tools * Hates missing out on critical market movements due to system lag and lack of alerts |
| Goals | | Environment |
| * Monitor multiple stocks efficiently * Get real-time alerts for key stock movements * Use AI-based insights for smarter investment decisions | | * Works in a corporate office but travels frequently * Uses a high-end Windows PC and a tablet for meetings * Checks stock data on his phone regularly |