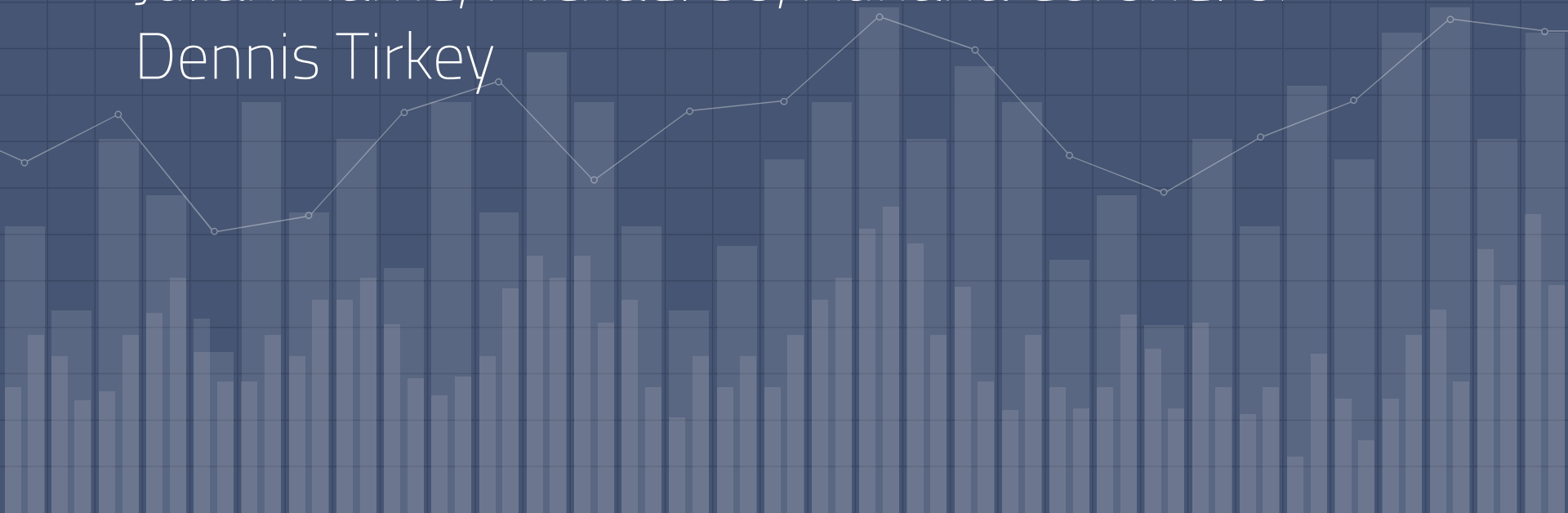


Social Finance App

Julian Hame, Michael So, Adriana Coronel &
Dennis Tirkey



INTRODUCTION

An brief introduction to the topic of social finance.



TOPIC

The intersection of social and finance—as well as shifting attitudes around what we share about money online—has given way to an ambitious new wave of financial products.



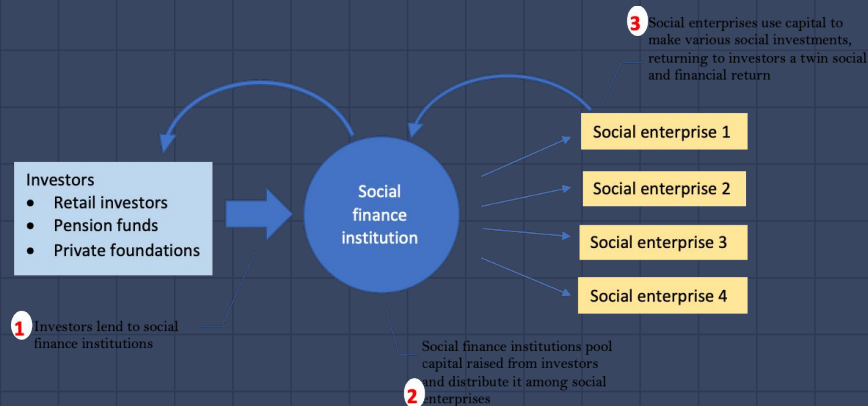
CASE

Our team is preparing an analysis for our client Deloitte about a potential new product in the social finance area. It is our job to research the current state of the art products on the market and made a case for a new app (product) for an underserved market.



WHAT IS SOCIAL FINANCE?

A classification of financial services which focus on public benefit while still being profitable to its investors. Bridges the gap between philanthropy and profitability.



MARKET ANALYSIS

Research regarding current social finance products.



2

CURRENT SOCIAL/FINANCE PRODUCTS

SoFi – helps their users reach financial independence by providing financial products and services

Public.com – investing and social media platform that allows users to be better investors by providing insights from a diverse community

Frich – a social media platform and finance application that targets millennials and Gen-Zers to help manage and display their finances



CURRENT SOCIAL/FINANCE PRODUCTS

SoFi

- ▣ Provides student/auto loan refinancing
- ▣ Helps refinance mortgages
- ▣ Personal loans, credit cards and banking
- ▣ investing

Public.com

- ▣ Provides access to custom company metrics
- ▣ Real-time analysis
- ▣ Get insight from a community of investors, creators, and analysts

Frich

- ▣ Display your finances as a social media
- ▣ Can set challenges and spending goals with friends
- ▣ Identifies the financial areas to work on and guides users to changing their habits

Competitor Analysis

Us

- Generates various infographics pertaining to user portfolio
- Supports a wide range of assets

Our Competitors

Limited infographics



APP PROPOSAL

A proposition for a new app for the social finance market.



3

APP OVERVIEW

TradeSocial

- A social network platform involving investments of users
- Users can view the values of their current investments
- App generates statistics based on a user's portfolio
- Allows social finance institutions to advertise and raise money from users

PRIMARY FEATURES

Investment Tracking

Any user can keep track of many different investments they own all in one place. The app will also provide a live feed of the total value of their investments.



Stats & Infographics

Users can learn interesting statistical facts about their investments and even create simple infographics that can be saved or shared with others.



Social Network

Users can find friends and relevant groups to communicate with in private chat channels. Additionally, they can manage their own public feeds for all to see.



PRIMARY FEATURES

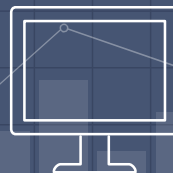
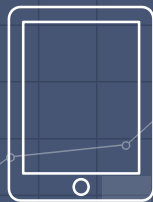
Profile Management

Users can customize their own profiles to showcase specific investments/data and choose what is and isn't publicly shown for other users to see.



Device Linking

Users will be able to access their accounts and use the application across all of their different devices, ranging from desktop PCs to their mobile phones.



Social Finance

Social finance institutions can use the app as a platform to advertise their projects to users to invest in. Users will be able to fund these projects in the app.



SUPPORTED ASSET TYPES

Stocks



Shares which represent a fractional ownership of a corporation, proportional to the total number of shares that exist. (Apple, Google etc.)

Cryptocurrency



Digital currency where transactions are managed by a decentralized system, rather than a government or other authority. (BTC, ETH etc.)

International Currency



The money used by various countries across the world. (USD, EUR, ZAR etc.)

Real-estate



Properties of land which may consist of buildings and natural resources. (Commercial, residential, vacant etc.)

Vehicles



A machine used for transporting people or goods. (Cars, motorcycles etc.)

Rare Items



Items of interest to collectors, often due to rarity and/or the monetary value of it. (Fine art, NFTs, trading cards, virtual items etc.)

CONCLUSION

Let's wrap things up.



FINAL CONSIDERATIONS - MARKET

- ▣ Investors/Users
- ▣ Social Enterprises
- ▣ Social Finance Institutions
- ▣ Intermediaries



FINAL CONSIDERATIONS - APP

- ▣ Feature-richness
- ▣ Security & Encryption
- ▣ Marketability
- ▣ Profitability



THANKS!

Any questions?

