

# INVESTMENTS & ORGANIZATION: STREAMLINING PORTFOLIO MANAGEMENT

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# INTRODUCING: JAKE



- Jake is a 43-year-old stock investor and senior financial analyst as he juggles a demanding job while managing his investments.
- He recently had a promotion and has since had less time to manually track market fluctuations making it difficult to stay updated on stock performance and potential risks.
- He needs a method to see his centralized stock portfolio that consolidates all his investments.
- Perhaps providing real-time updates, automated alerts for sudden market changes, and secure access to sensitive financial data.
- Perhaps an app with customizable folders for organization, instant profit/loss calculations, and advanced security features like two-factor authentication would allow him to make timely, informed decisions.

# *Our main target: People who work with investments, stock analyst, portfolio managers, financial advisors*

- Commonalities in psychographics:
  - Data driven and analytical. Make decisions based on market trends and statistics
  - Time conscious and focused on being efficient as they value tools that save time
  - Security conscious, they prioritize financial safety and data privacy
- Commonalities in behavior:
  - Those that frequently check stock performance and financial news
  - Make frequent trades
  - Those looking for assist in decision making on their stocks
- Other commonalities:
  - Likely to be quite knowledgeable in the field of economics, business or finance
  - Maybe use other tools to aid them with financial decisions

# *Not the main target: Casual investors, retirees, passive income seekers*

- Commonalities in psychographics:
  - More conservative with investments as they prefer long-term stability over short-term gains.
  - Not as actively engaged in daily market fluctuations.
  - Less concerned with speed and efficiency, more with how reliable and trustworthy investments can be
- Commonalities in behavior:
  - More likely to listen to financial advisors or someone else for decision making
  - Saving up for long term, such as holding stocks for longer and not trading daily
- Other commonalities:
  - May not need the real time tracking tools, perhaps only want a notification when something big happens
  - Avoid bigger risk, only investing in “index funds” and “bonds” rather than risky stocks

# Detailed Persona: Daily stock investor – Jake –

- Jake is 43 and works in the stock market. He wants to ensure that his investments are in a safe and reliable environment, minimizing risks while maximizing returns.
- He is moving up in his company, so he is getting more responsibilities and a heavier workload. As a result, he has less time to manually check his investments and track market fluctuations.
- Despite his busy schedule, he needs to make sure that at any time the investments that he has are not overall losing value, allowing him to make timely decisions when necessary.

# THINKS, SEES, FEELS, DOES

<b>Thinks</b>	<b>Jake thinks that it takes too long to check on his investments, with his duties getting larger</b>
<b>Sees</b>	<b>Around Jake's department, most of the investments are in different sites so the process is not streamlined</b>
<b>Feels</b>	<b>Jake feels that he is being overwhelmed with the new responsibilities he has and finding the solution to streamline his work</b>
<b>Does</b>	<b>Jake looks around online for possible apps to use and he also asks his coworkers if they have any suggestions</b>



# PROBLEM STATEMENT + ALTERNATIVE W/ VALUE PROPOSITION

Problem scenario	Current alternative	Value proposition
Jake must look at a lot of different sites to check on his investments	He checks every site, but it is hard to keep up with all the ways the sites do things differently	Have an app that lets you check on all your investments at once
Jake does not know when something goes wrong in one of his investments	He checks each investment daily, but risks missing sudden changes	Have the app alert him if the investment drops suddenly or if it has not gone up in a while
Jake is concerned about security risks and unauthorized access to his investments	He spreads his investments across different platforms to reduce risk	The app will have better security with 2 step authentications





# THANK YOU

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