

List of Potential Personas

Stock investor – John – Is an adult man who works in an office and wants to gain more profit from his savings

Daily stock investor – Jake – He works in the stock market and wants his investments in a safe place.

Inheritance - Richard J. Smith – Comes from a rich family and needs to make sure none are losing him money

Retirement plans – Ben – Is a grandparent that wants to make sure his retirement funds lets him do stuff with the kids

College Funds – Chad – Is a parent that wants to put his kids through college by saving and investing money

Student Learning – Jim – Is a student in college learning about the stock market by having twenty dollars to invest throughout the semester

Overzealous User – Zeke – Is an average 9 to 5 worker who “jumps the gun” too often on some decision. Saw that “Game Stop stock” was trending in the news and immediately jumped on board the band wagon

Detailed Persona Jake

Problem statement:

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. By streamlining his workflow, this app would help Jake maximize returns, minimize risks, and stay ahead of the world of stock investing.

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 holding stocks for longer and not trade 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

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

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 |