



# **STOCK TICKER PERSONAS**

# SAM – (BIG INVESTOR)

Sam is a 33-year-old software engineer who developed an interest in stock trading during the pandemic. He's not a professional trader, but he enjoys researching stocks, making informed trades, and tracking his portfolio daily. Every morning, before starting work, Sam checks how his stocks are performing, paying close attention to real-time price movements. He uses multiple trading platforms but finds them either too bloated or too slow in updating stock prices. Sam wants a clean, real-time dashboard that gives him the essentials: stock prices, net gains or losses, and an easy way to manage his portfolio. He also loves automation and notifications—if a stock moves significantly, he wants to know immediately. While he's comfortable with complex data, he doesn't want an overload of unnecessary details cluttering his view.

Combined with **Jake** and **Billy & Mandy**: A man or woman in their 30s who has a main job outside of trading but still spends time managing their own investments.



## Thinks

- “I need real-time updates to make the right trades at the right time.”
- “Most stock apps are either too simple or too bloated with useless features.”
- “If a stock moves significantly, I need to know ASAP.”

## Feels

- Excited when he sees a good opportunity but frustrated when platforms are slow.
- Confident in his stock-picking ability but wants better tools to support his strategy.
- Overwhelmed by cluttered interfaces that make it hard to get key insights.

## Sees

- A mix of stock trading apps, financial news, and analytics tools.
- Market trends and alerts popping up on different platforms.
- Dashboards full of charts, but some feel unnecessarily complicated.

## Does

- Checks his portfolio every morning before work.
- Sets up notifications for major price movements.
- Switches between different apps to get the best experience.

# LISA (ACTIVE DAY TRADER)

4

Lisa is a 28-year-old full-time day trader who lives and breathes the stock market “analyst” twitter pages. She starts her mornings with coffee and three monitors displaying different real-time trading platforms, price charts, and twitter news feeds. Lisa makes rapid trades based on small price movements, so she cannot afford delays. She needs a lightweight, ultra-fast ticker that updates immediately, lets her add or remove stocks on the fly, and provides instant insights into her portfolio performance. While she appreciates historical data, her primary concern is short-term price action and trends. Many apps she’s tried in the past introduce unnecessary lag or require too many steps to add or remove stocks. For Lisa, speed and efficiency are everything, and she will abandon any tool that doesn’t meet her fast-paced needs.

Combined with **John & Lindsey**: Person whose main income source / job is stocks. In their 20-30s. Does a lot of fast paced, informed trades.



## Thinks

- “Speed is everything. Delayed data can cost me money.”
- “I need a fast, customizable stock tracker without extra fluff.”
- “Why do some apps have so many useless steps just to add a stock?”

## Feels

- Hyper-focused during trading hours, impatient with slow platforms.
- Stressed when there’s market volatility but thrives on the adrenaline.
- Annoyed when she has to manually update or navigate slow-loading pages.

## Sees

- Three monitors filled with real-time stock charts, trading platforms, and financial Twitter feeds.
- Constantly refreshing price movements and charts.
- A mix of financial news, Reddit, and Twitter discussions on market trends.

## Does

- Trades actively throughout the day based on price fluctuations.
- Refreshes stock tickers and Twitter for breaking financial news.
- Tries different stock tracking apps but ditches any that are slow or clunky.

# JAKE (CASUAL)

6

Jake is a 22-year-old college student who isn't currently investing but enjoys keeping up with the stock market out of curiosity. He follows tech stocks because that's what he likes, but he doesn't need an entire portfolio management system. Jake just wants a simple stock ticker that lets him keep an eye on interesting companies without the commitment of tracking holdings or calculating gains and losses. He often checks prices while scrolling through social media and prefers an interface that's minimalistic, mobile-friendly, and easy to digest. He finds most stock apps overwhelming, with too many features aimed at serious investors. Jake needs a tool that lets him casually follow stocks without having to interact with a complex financial dashboard.

Combined with **Jim**: Young student that doesn't really have money in it yet but is eager to start investing. They are still learning the ropes and are more interested in exploring features than putting a lot of money into it yet.

Combined with **Mike**: Casual trader that doesn't have a lot of money in it yet and just wants to learn how to do investments.



## Thinks

- “It would be cool to keep an eye on the market, but I don’t need anything complex.”
- “Why does every finance app assume I’m an expert investor?”
- “I just want to see how Apple, Tesla, and Nvidia are doing, nothing more.”

## Feels

- Curious about the market but not committed enough to deep-dive into investing.
- Overwhelmed by technical jargon and complicated dashboards.
- Annoyed by stock apps trying to push investment features he doesn’t need.

## Sees

- Social media posts about stock trends and hype around certain companies.
- Occasional financial news articles, but not in-depth analysis.

## Does

- Checks stock prices casually while scrolling through Twitter or Reddit.
- Occasionally opens a finance app just to see what’s trending.
- Talks about stocks with friends but doesn’t actively invest yet.

## WALTER (DIVIDENDS)

Walter is a 58-year-old retired accountant who has spent decades refining his investment strategy. He's not interested in chasing high-growth stocks or timing the market, instead his focus is on stable, income-generating dividend stocks that provide him with a steady stream of passive income. He wants to track yield percentages and payout schedules with the same intensity that others track stock prices.

Combined with **the Senator, Sam, and Ben**: Old person who doesn't really care about fast paced stuff and just wants to have their money make more money passively for retirement. Isn't into a lot of trading





## Thinks

- “Stocks should work for me, not the other way around.”
- “Passive income is the goal—consistency over hype.”
- “I need to track my dividends and make sure my payouts are on schedule.”

## Feels

- Satisfied watching his dividend income grow steadily over time.
- Frustrated when apps prioritize short-term trading features over income tracking.
- Annoyed by stock platforms focusing on high-risk, high-reward strategies.

## Sees

- Dividend yield charts, payout schedules, and reinvestment growth projections.
- Company financial reports and dividend history.
- Portfolio balance changes over long-term timeframes rather than daily fluctuations.

## Does

- Checks his stock tracker for upcoming dividend payouts.
- Reads earnings reports and dividend increase announcements.
- Ignores short-term stock price movements unless they affect his passive income.

# KYLE (CRYPTOCURRENCY)

10

Kyle is a 24 year old tech guy that got interested in cryptocurrency at a young age. Now that the cryptocurrency market has ballooned, he is in a position where he needs to have a better way of managing his portfolio. He's not really interested in any of the "currency" aspects of cryptocurrency, he just wants to make profits with it. His ideal stock app allows him to track cryptocurrency market trends, trade on the leading exchanges, and see cryptocurrency news from his phone.

Combined with Zeke:

Unhinged, young, crazy trader that doesn't really know what they're doing. They focus on very fringe markets and assets making giant irresponsible gambles.



## Thinks

- “I don’t care about blockchain tech, I just want to maximize profits.”
- “Why is it so hard to find one app that tracks all my crypto holdings?”

## Feels

- Frustrated when he has to use multiple platforms to track different tokens.
- Annoyed by outdated or slow apps that don’t support his trading style.

## Sees

- Multiple crypto exchange dashboards, price charts, and platforms
- Crypto news sites and social media posts hyping the latest coins.
- Real-time updates of Bitcoin

## Does

- Trades between different cryptocurrencies frequently.
- Watches crypto news and price charts all day.
- Uses multiple apps to track different wallets and exchange accounts.

<b>Problem Scenario</b>	<b>Current Alternative</b>	<b>Value Proposition</b>
Sam and Lisa rely on real-time stock data	Current platforms have delays that greatly impact efficiency	With a real-time interface, Sam and Lisa can do their fast past trading.
Stock ticker apps are complicated and daunting	Some casual investors have to deal with very complicated interfaces with features they will never use.	Having a "casual" or "reduced" mode will allow casual investors to use the app more comfortably.
Stock ticker apps may be limited in types of investments they can show	Users who want to invest in cryptocurrency or an alternative scheme like dividends will need to use multiple apps.	Having an all-in-one interface allows users with multiple types of investments to use the same app.
Stock ticker apps have a lot of features that aren't explained	Users need to google how to use features or read detailed manuals (they hate that)	Have a tutorial button that explains all of the main features of the app
Stock ticker apps don't have good notification systems / settings	Users can only opt into alerts on movements for specific stocks	Having an "advanced" notification option allows users to create customized alerts for their needs
Stock ticker apps don't have good automation	Users currently cannot setup detailed automation for automatic trades	Users will use the automation system to do more trades, even when they're not on the app.

Inheritance & college fund &  
Normal guy (has less in it than  
Sam)

