

Case Study – Zerodha

1. Business & Market Understanding

Overview:

Zerodha is a leading fintech company in India, offering online trading platforms for stocks, commodities, and currencies. Understanding the market dynamics and business landscape is crucial for further growth and innovation.

Market Overview:

Fintech Sector: The fintech sector in India has witnessed exponential growth, driven by factors like increasing internet penetration, government initiatives, and a growing investor base.

Competitors: Zerodha faces competition from traditional brokerage firms and emerging fintech startups offering similar services.

Trends: The market is moving towards low-cost and user-friendly trading platforms, with a focus on democratizing investing and financial literacy.

Business Understanding:

Mission: Zerodha aims to empower retail investors by providing them with affordable and accessible investment tools.

Revenue Model: The company generates revenue through brokerage fees, subscription services, and interest income on margin trading.

Challenges: Regulatory compliance, technological innovation, and customer acquisition are key challenges in the fintech industry.

2. Business Requirements Document (BRD)

Objective:

To introduce a new feature that enhances business growth and improves user productivity on the Zerodha app.

Feature: Social Trading Platform

Objective: Enhance user engagement and encourage knowledge sharing among investors.

Key Features:

User Profiles: Allow users to create profiles showcasing their investment strategies, portfolio performance, and expertise.

Social Feed: Enable users to follow and interact with other investors, share insights, and discuss market trends.

Copy Trading: Implement a feature where users can automatically replicate trades of experienced investors they follow.

Integration: Seamless integration with the existing Zerodha app infrastructure.

Timeline: Aim to launch the feature within nine months.

3. Product Requirements Document (PRD)**Overview:**

The PRD outlines specific functionalities and user experience aspects of the Social Trading Platform.

User Persona: Retail investors seeking insights and guidance for their investment decisions.

Features:

User Profiles:

Customize profiles with investment goals, risk tolerance, and past performance.

Social Feed:

Curated feed displaying posts, market updates, and investment ideas from followed users.

Copy Trading:

Simple interface to browse and select experienced traders to follow and replicate trades.

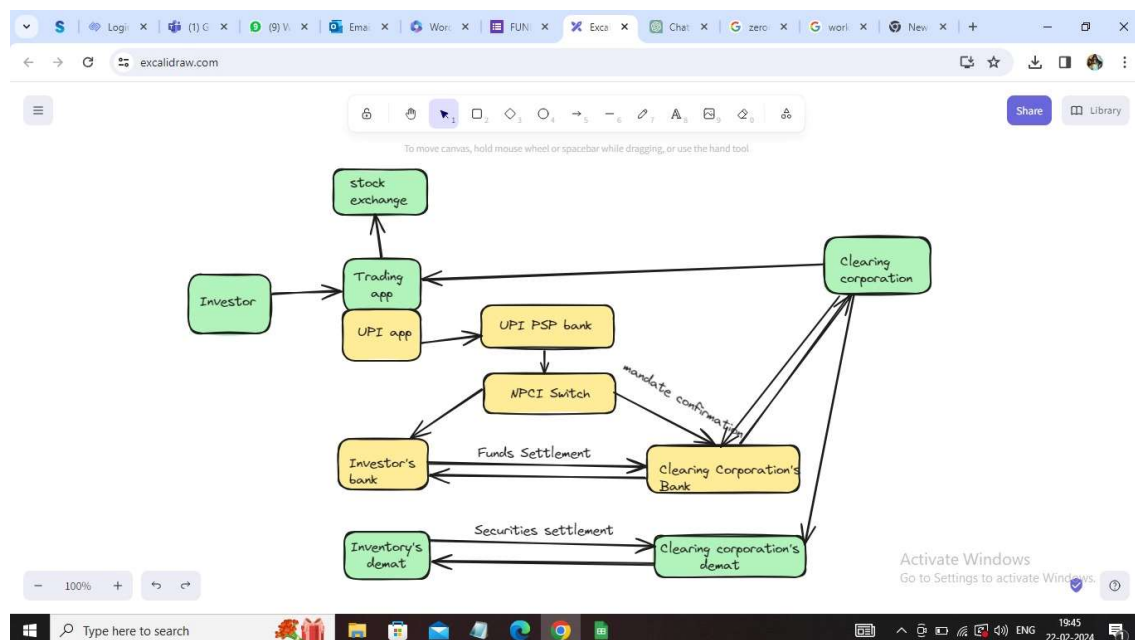
User Interface:

Clean and intuitive design with emphasis on user profiles and social interaction features.

Metrics:

User engagement metrics such as active users, post interactions, and number of copied trades.

4. User Journey & Workflow



Conclusion

In conclusion, through comprehensive business and market understanding, Zerodha aims to implement a personalized investment recommendation feature to enhance user engagement and drive business growth. With clear business requirements, product specifications, and a user-centric approach, Zerodha is poised to maintain its leadership in the fintech industry.