



**Engineering Portfolio Success Through Analytics**

# TEAM

## Members



Adrian Chuah



Ang Jin Wei



Evelyn Kang



Hwang Shu Rong



Law You Leong



Lim Sheng Jun

## Mentors



Anand Bhojan



Keith Carter



Phil Woods



# CONTENT

01

## **Preliminary Idea**

Problem Statement

Value Proposition

Solution

02

## **Market Validation**

Interviews & Insights

Product

03

## **Business Opportunities**

Customer Discovery

Market Sizing

Business Model

04

## **Competitive Advantage**

Competition

Our Edge

05

## **Go-to-Market**

Market Adoption

Growth Funnel

Vision

Future Development

# Preliminary Idea

## Problem Statement

Individuals face **difficulty in aggregating, monitoring and managing** investment portfolios in various asset classes from different brokerage accounts/ platforms.

**No existing easy way** to evaluate performance of algorithmic strategies in a portfolio.

Robo-advisors **disconnects** investors with their investment strategies.

## Value Proposition

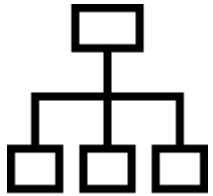
Our product aims to provide robust trading algorithm, data and tools to empower users to analyze **all their portfolios in a single platform** and **engineer informed decisions**.



# Solution

**A platform with robust functions where users can analyze and manage all their portfolio**

---



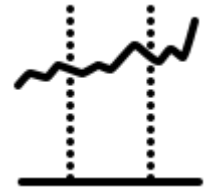
Monitor all portfolios  
in a single platform



Analyze portfolio and  
provide optimization  
recommendations



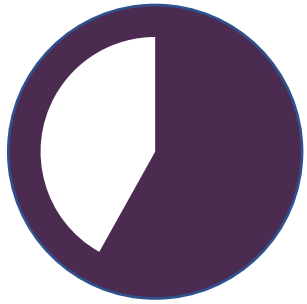
Proprietary  
algorithm and  
back-test result



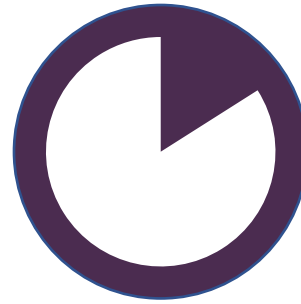
Macro market trends  
and social sentiment  
indicators

# Market Validation

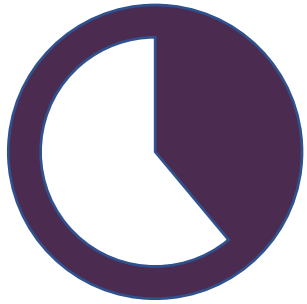
## Quantitative Validation



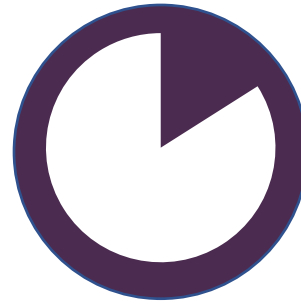
**40%** have 3 or more brokerage accounts across different assets.



**80%** do not have access to financial portfolio/strategy planning tools/services.



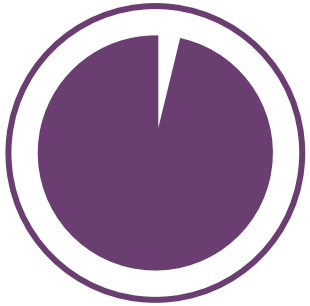
**60%** find it difficult to manage portfolio across different platforms.



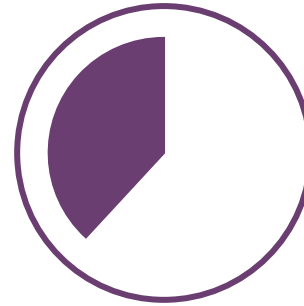
**80%** do not implement any algorithm as part of their investment strategy but are interested to do so.

# Market Validation

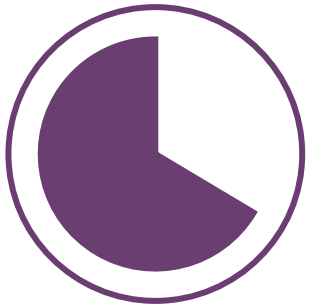
## Product Survey



**93%** will adopt the platform.



**40%** are willing to explore paid options such as real time data and proprietary algorithm subscription.



**66%** are satisfied with the current functions of the platform.

## Popular Features of MVP

- Strategy Back Test
- News & Social Sentiment

# Product





# Customer Discovery



## Budget

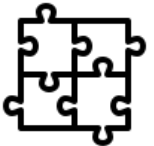
13% of interviewees are willing to subscribe at USD\$99.

33% of interviewees are interested in a modular fee payment.



## Urgency

53% of interviewees had negative experience in monitoring different portfolios from different platforms.



## Innovation

Platforms available online are either very fragmented or not transparent.



## Accessibility

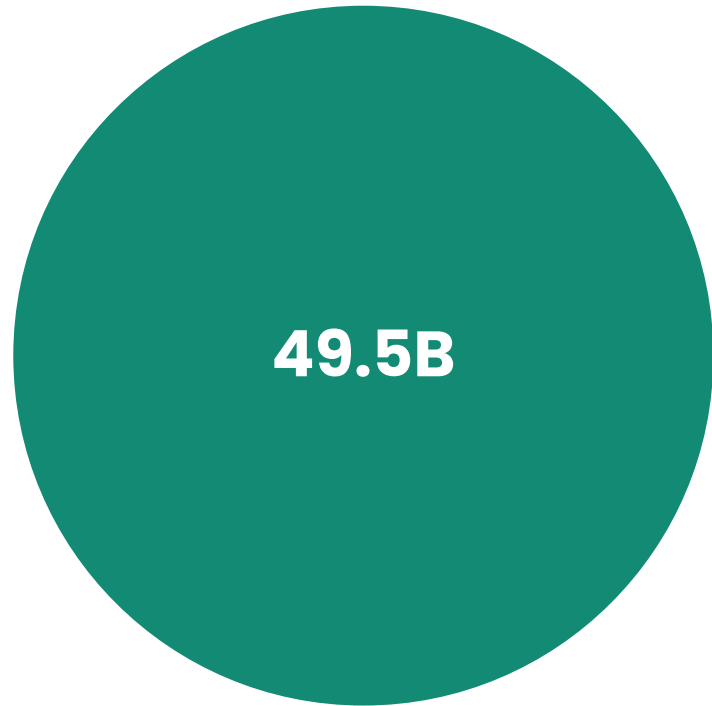
Individuals who want to monitor their portfolio actively are also active investors → can be reached through brokerages' platforms/ financial literacy community.



- Sufficient investment knowledge/experience
- Active investor/trader
- Trades multiple asset classes
- Has several brokerage accounts/portfolios but lack access to a single platform to consolidate data of his/her portfolio → **Need** a way to analyze/ optimize his overall portfolio
- **Keen to explore** new trading algorithms → enhance in their investing/trading performance
- **Fear** of the unknown; negative investing/trading behaviors and experience

# Market Sizing

Over 1B retail trading accounts in the world, valued at \$7.5 trillion. We've just scratched the surface.



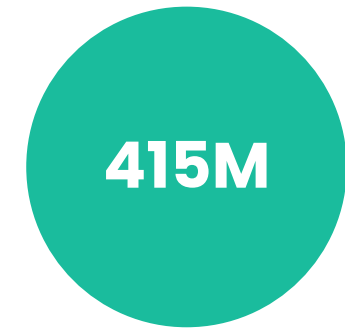
## Total Available Market (Worldwide)

500M traders worldwide  
US – 150M have investments  
China – 500M accounts & 100M  
active traders



## Served Available Market

13.9M active online retail traders



## Target Market

4.2M

2 or more trading platforms  
No portfolio monitoring tools  
Have not implemented algo-trading

# Business Model

Our potential revenue streams to ensure a sustainable freemium model with modular fee structure.



## **Subscription**

Portfolio analytics and optimizations



## **Profit sharing**

Proprietary trading algorithm

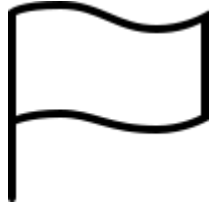


## **Channels & Distribution**

Collaboration/integration with brokers and platforms



# Our Edge



## **First to Market**

For analyzing and provide optimizing recommendations for portfolio across different asset classes



## **Ease of Use**

Intuitive platform where user can customize their dashboard



**Proprietary Trading Algorithm**  
with transparent back test results



## **Integration**

A scalable and complementary product to the current trading tools/software



## **Social Sentiment**

Machine learning algorithm to assess news and social sentiment



## **Collaborative Alpha**

Users can list their algorithm in the alpha market



# Market Adoption

## Events

Raise awareness of financial literacy. Spreading the benefits of optimizing portfolio and systematic investing/trading approach.

### Objective

We will provide workshops and bootcamps to educate people on algorithmic trading.

## Partnership

We provide free portfolio analysis and optimization across various asset classes.

### Our Benefits

Linkbacks for major SEO, direct and indirect traffic, branding, product placement.

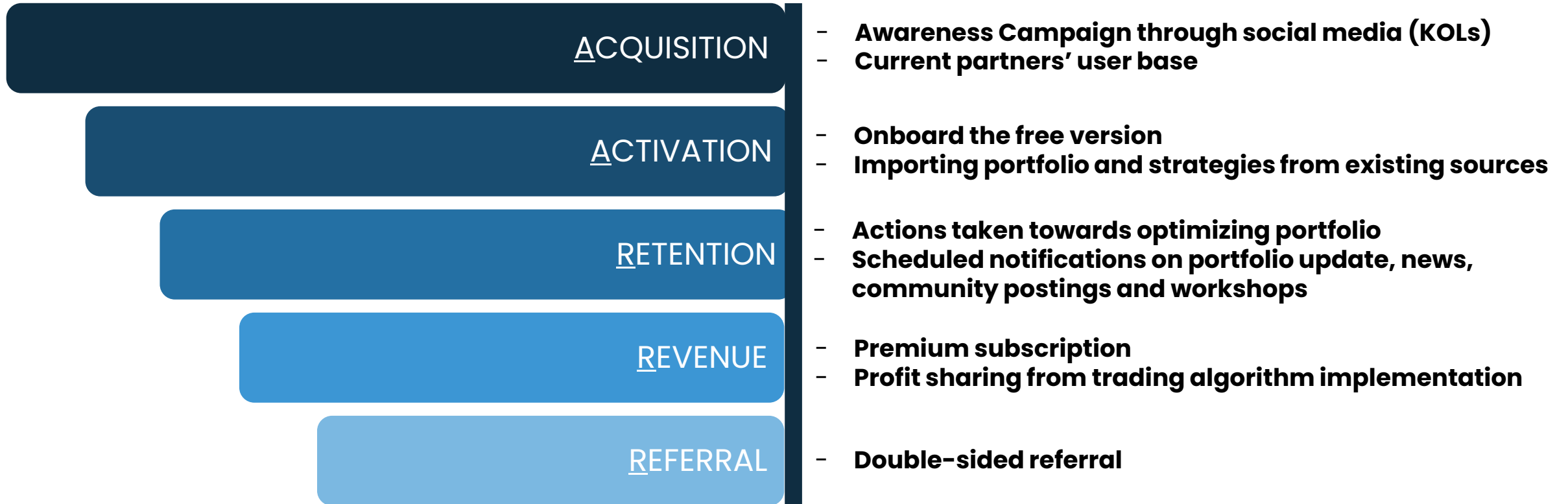
### Partners' Benefits

Significant cost savings, immediate time to market, no upkeep costs, new tech makes them more desirable than competition to their users.



# Growth Funnel

Our mission is to become the new standard in portfolio analytics and optimization.



# Vision

## “Engineering Portfolio Success Through Analytics”

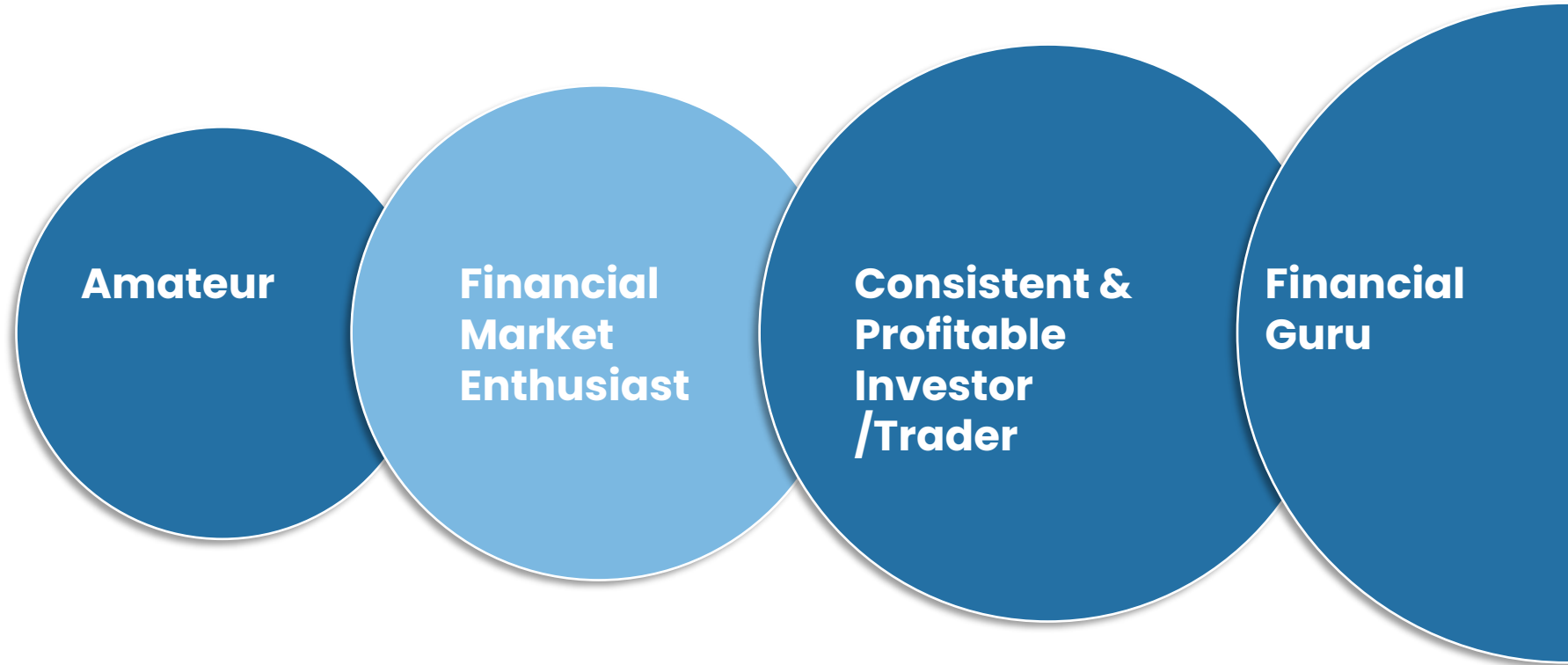
### Many Traders’ Pitfall

- Not building a diversified portfolio
- Not regaining balance
- Focus on short term trading but ignore the big picture
- Ignoring risk aversion
- Following the herd
- Based on unfounded Tips

### Our Goal

We believe success can be engineered!

We strive to empower investors with an array of features and guide their journey from amateur to successful investor/trader in a consistent and systematic approach.





# Future Development

A solution with powerful features, that is responsive, interactive and work on any device.



**Live trade execution**



**Cross-platform application**



**Technical charts**



**Direct API integration with  
brokerage accounts/ platforms**



**Integrate features and  
functionality into  
trading platforms**



**Alpha market → user-  
generated alpha models**

# Q & A