

# Ez-Invest

Leading wealth management adoption  
across Asia

**Team Roaming Bears**

Austin

Eric

Fabian

Raphael

Serena

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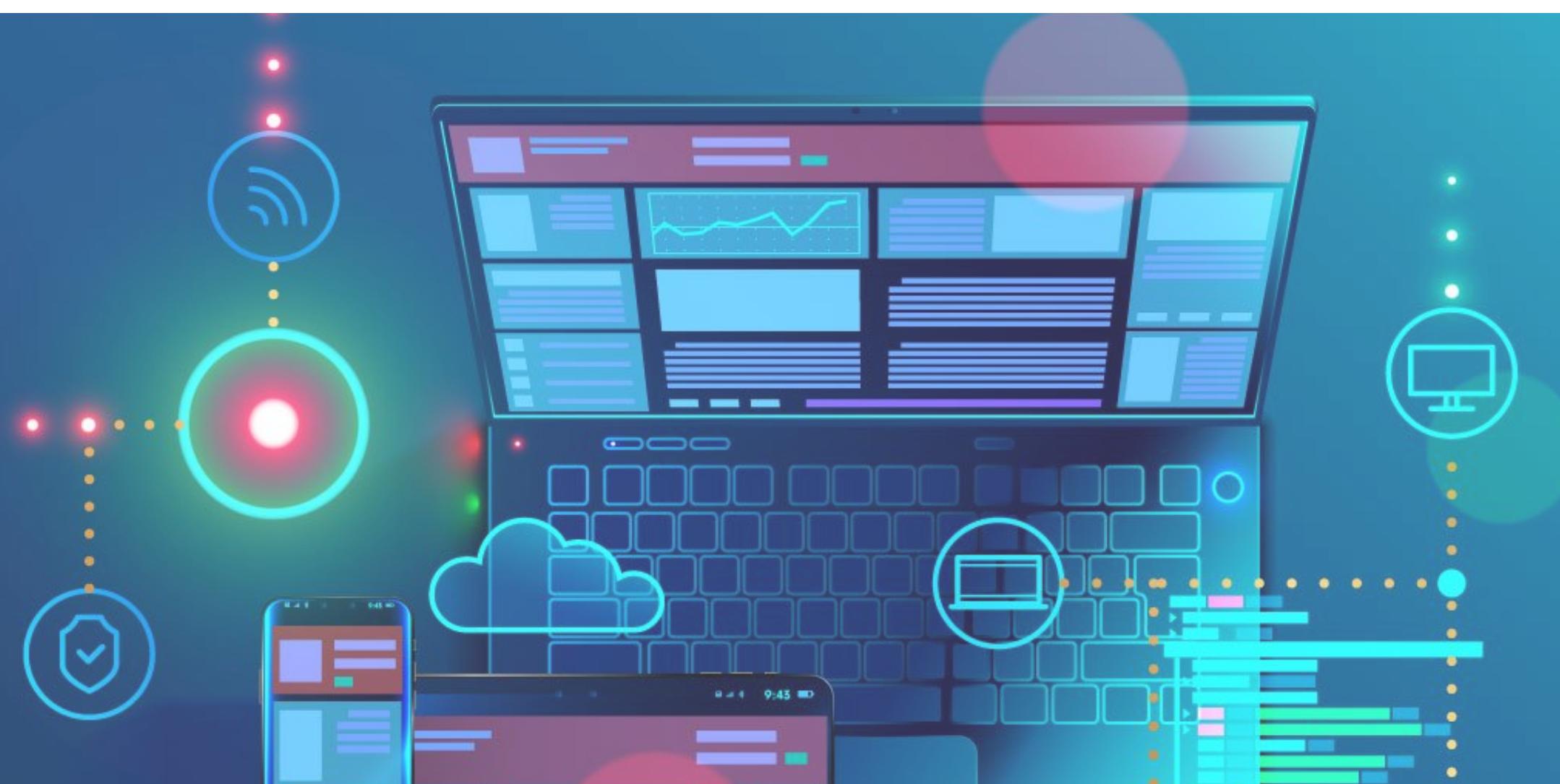
## Planning

Choice of Tech Stack

Project management



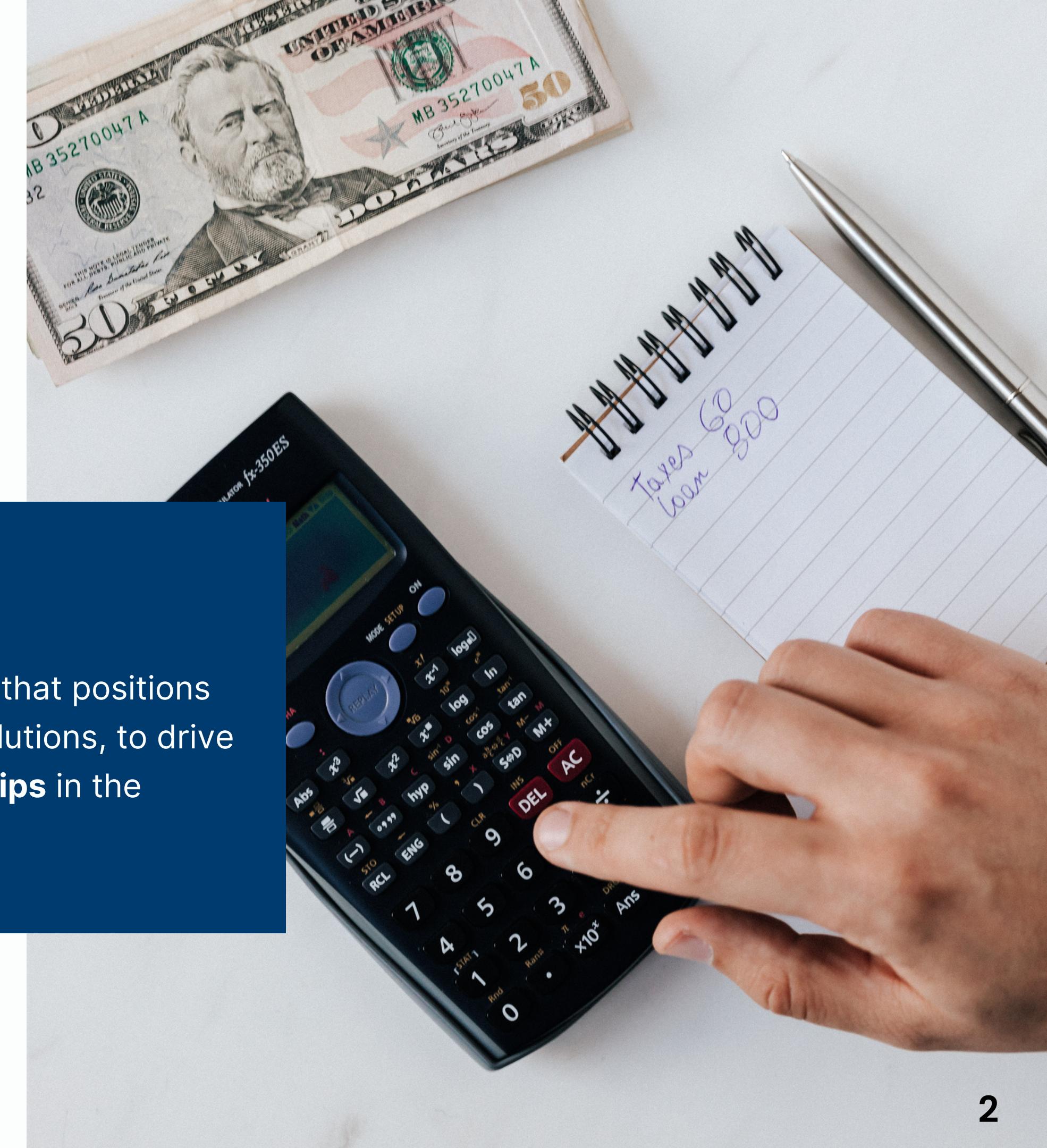
## Project Walkthrough



# Problem Statement



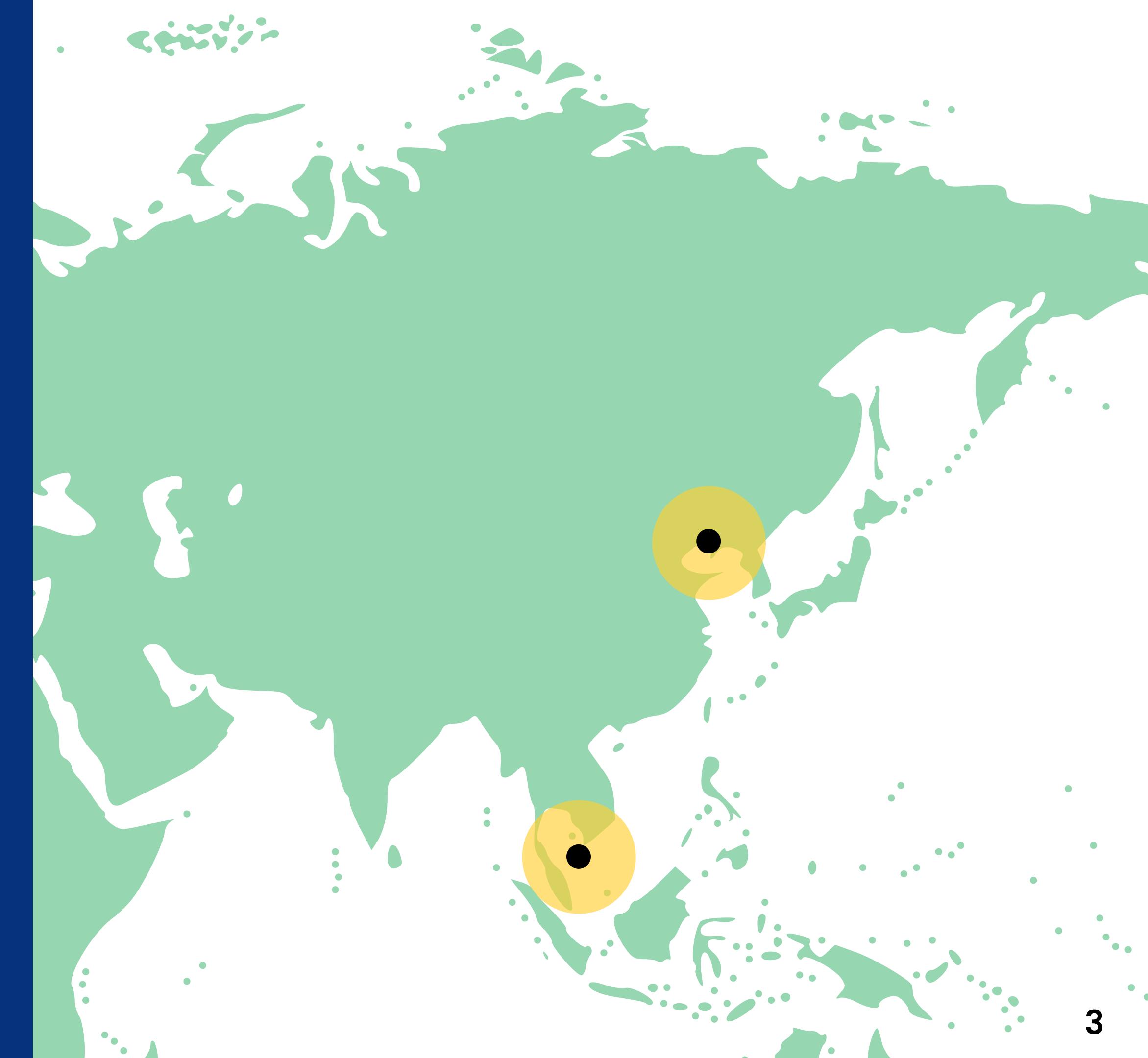
Design an application for both **clients and bankers** that positions Citi as the modern bank for wealth management solutions, to drive **client acquisition and strengthen client relationships** in the **Asian market**.



# Target Audience: The Mass Affluent

As of 2020, \$43.3 trillion in assets held by the Asian mass affluent

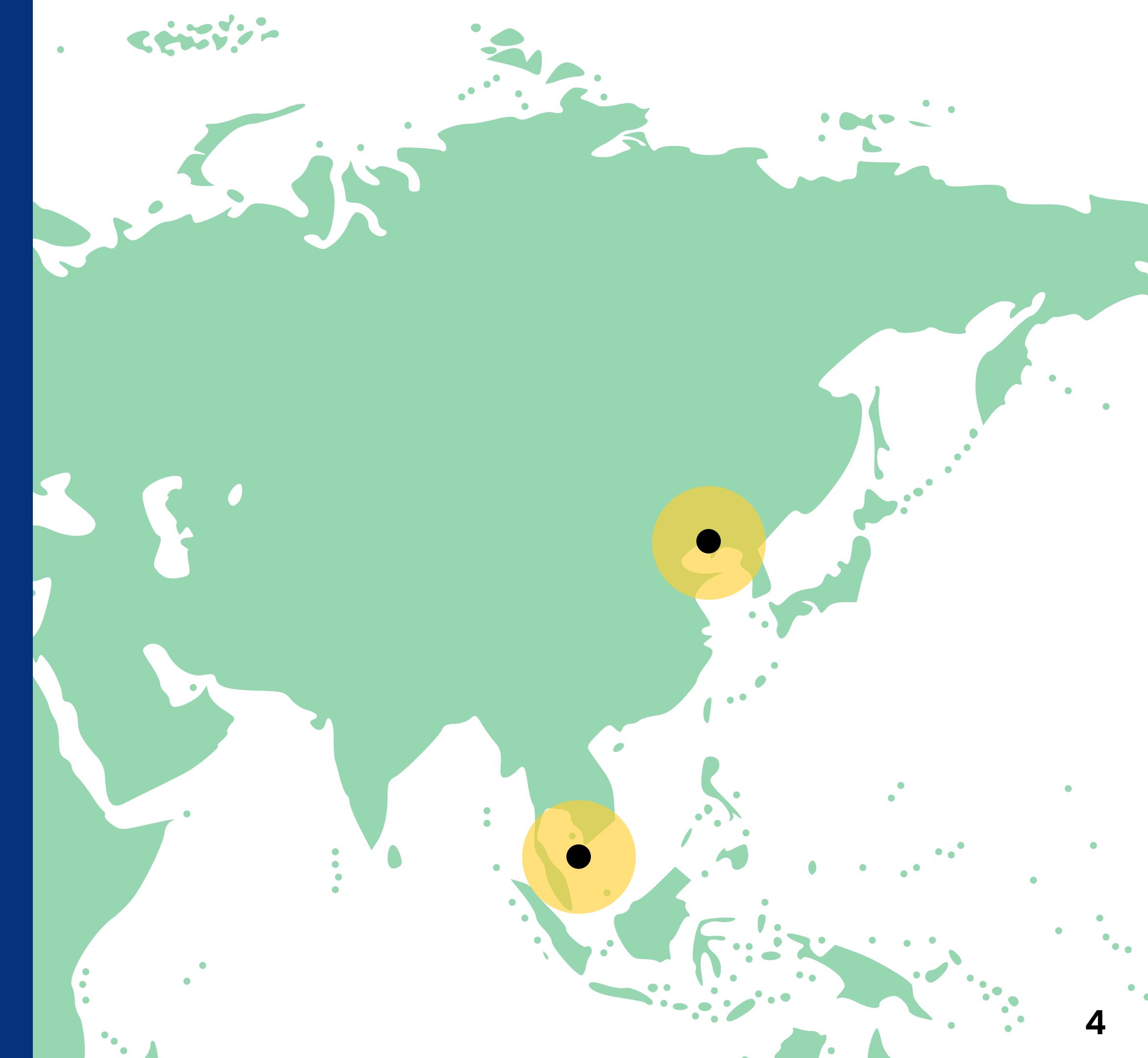
Only 20% is tapped by the wealth management industry



# Characteristics of The Mass Affluent

Lack of Brand Loyalty

Desire personal empowerment to  
make informed decisions



# Our Objectives

1. To drive client acquisition through a variety of personalized offerings and education
2. To build a convenient one-stop platform to connect clients with bankers
3. To forge a close-knit Citi community to cultivate brand loyalty



# Features for the curious client

## Home page

Personalised News + Word Cloud

## Community

Community forum and posts

## Invest

Investment Plans for varying risk appetites

## Profile

Milestones to keep the client updated and motivated



# Features for the bold banker

01.

## Connect with clients

A marketplace for bankers to connect with clients

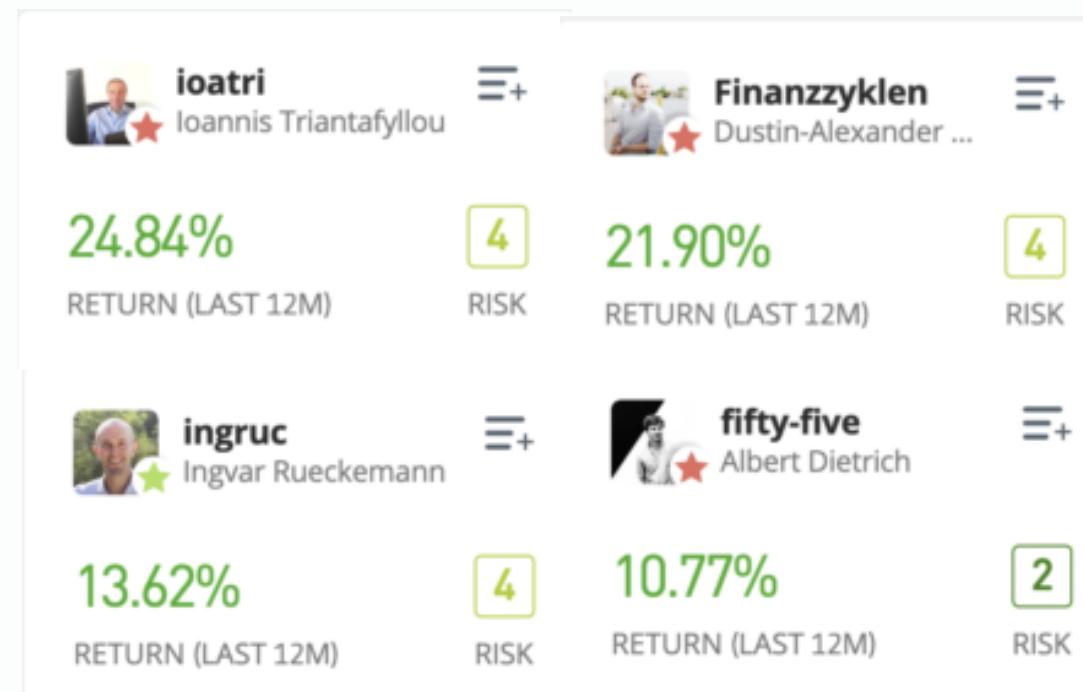


Image edited from eToro

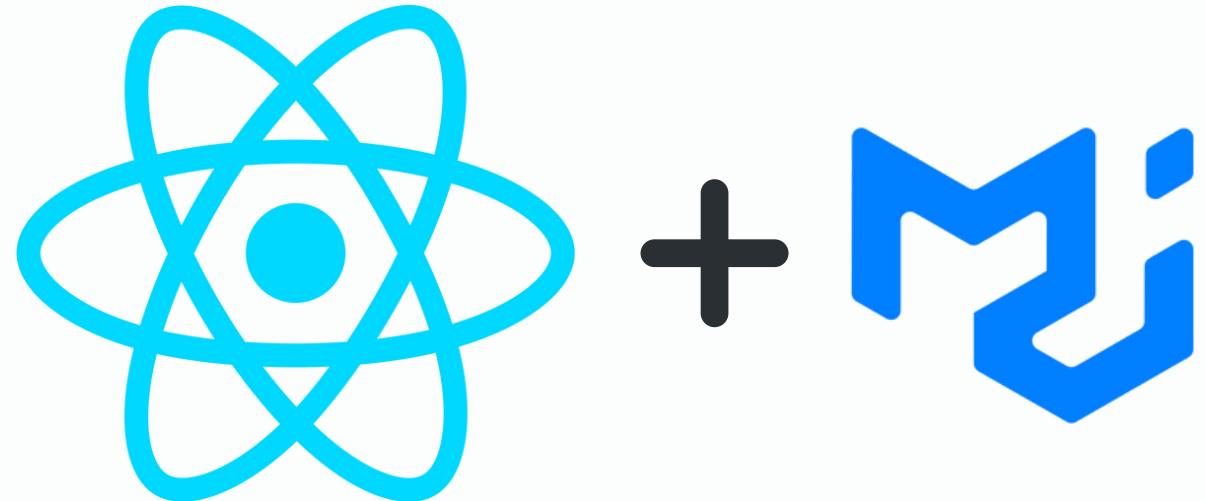
02.

## Tracking performance

A dashboard to track wealth management performance



# Our tech stack



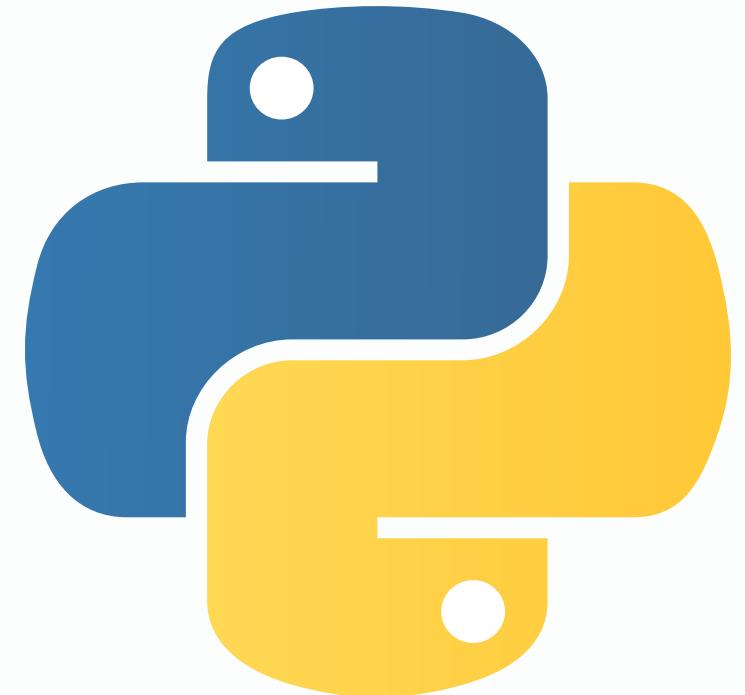
## Frontend – ReactJS

Clean, easy to build visuals using React.JS and the Material UI component library



## Backend – Flask

Used to store user data conveniently, would be transitioned to an actual database in production



## Python

Natural Language Processing

# Prioritizing Issues with Github

|   |   |                   |                 |
|---|---|-------------------|-----------------|
| ■ | ● After investment plans are recommended show a list of managers to choose from | difficulty.Easy   | priority.Medium |
|   | #23 opened yesterday by serenakemono  |                   |                 |
| ■ | ● Customer churn analysis in bankers' dashboards                                | difficulty.Hard   | priority.Medium |
|   | #19 opened 2 days ago by serenakemono   |                   |                 |
| ■ | ● Display of a list of clients in bankers' dashboard                            | difficulty.Easy   | priority.High   |
|   | #18 opened 2 days ago by serenakemono   |                   |                 |
| ■ | ● Display of summary of each generated news article on mouse over               | difficulty.Medium | priority.Low    |
|   | #17 opened 2 days ago by serenakemono   |                   |                 |
| ■ | ● Word clouds of all generated articles in Homepage                             | difficulty.Medium | priority.Low    |
|   | #16 opened 2 days ago by serenakemono   |                   |                 |
| ■ | ● Use machine learning model for investment plan recommender                    | difficulty.Hard   | priority.Low    |
|   | #15 opened 2 days ago by serenakemono   |                   |                 |
| ■ | ● Investment plan recommender through questionnaire in Investment Page          | difficulty.Easy   | priority.Medium |
|   | #14 opened 2 days ago by serenakemono   |                   | 1               |
| ■ | ● Purchased investment products / plans display under dashboard                 | difficulty.Easy   | priority.High   |
|   | #13 opened 2 days ago by serenakemono   |                   |                 |
| ■ | ● A dummy product display page  | difficulty.Easy   | priority.Medium |
|   | #12 opened 2 days ago by serenakemono   |                   |                 |
| ■ | ● Profile page setup  | difficulty.Easy   | priority.Medium |
|   | #10 opened 3 days ago by serenakemono   |                   |                 |
| ■ | ● Personalised news recommender for homepage                                    | difficulty.Hard   | priority.High   |
|   | #9 opened 3 days ago by serenakemono  |                   |                 |
| ■ | ● Community page to display posts   | difficulty.Medium | priority.Medium |
|   | #8 opened 3 days ago by serenakemono  |                   |                 |

Breakdown of abstract product features into 20 atomic issues

Classification of issues based on Importance and Priority

Optimising our deliverables with the limited time and resources

**Nothing to see here, add more  
slides in front**

# What we do different



Personal Touch



Brand Community



Educational  
Resources



≡+



≡+

24.84%

4

RETURN (LAST 12M)

RISK

21.90%

4

RETURN (LAST 12M)

RISK



≡+



≡+

13.62%

4

RETURN (LAST 12M)

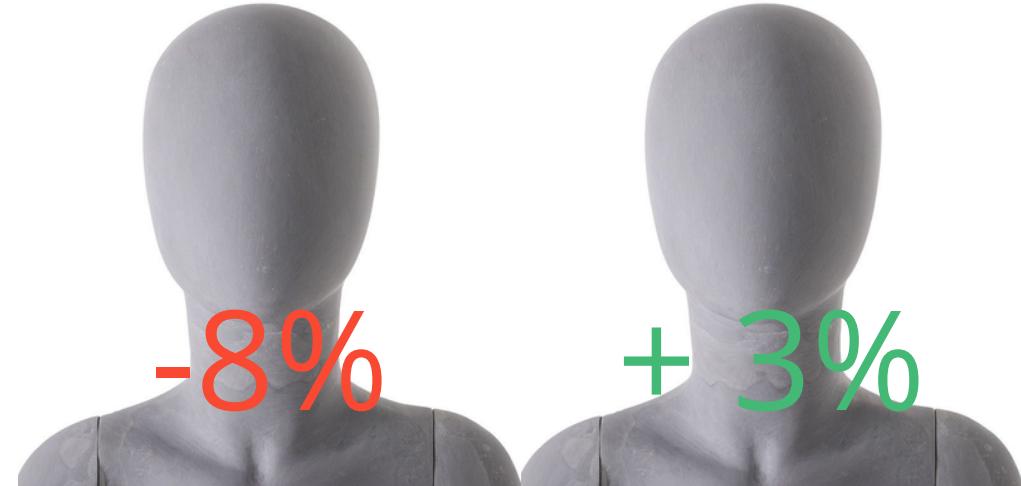
RISK

10.77%

2

RETURN (LAST 12M)

RISK



# Key Skills

**Lorem ipsum dolor sit amet, consectetur  
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# Tech Stack (ReactJS for frontend, Flask for backend)



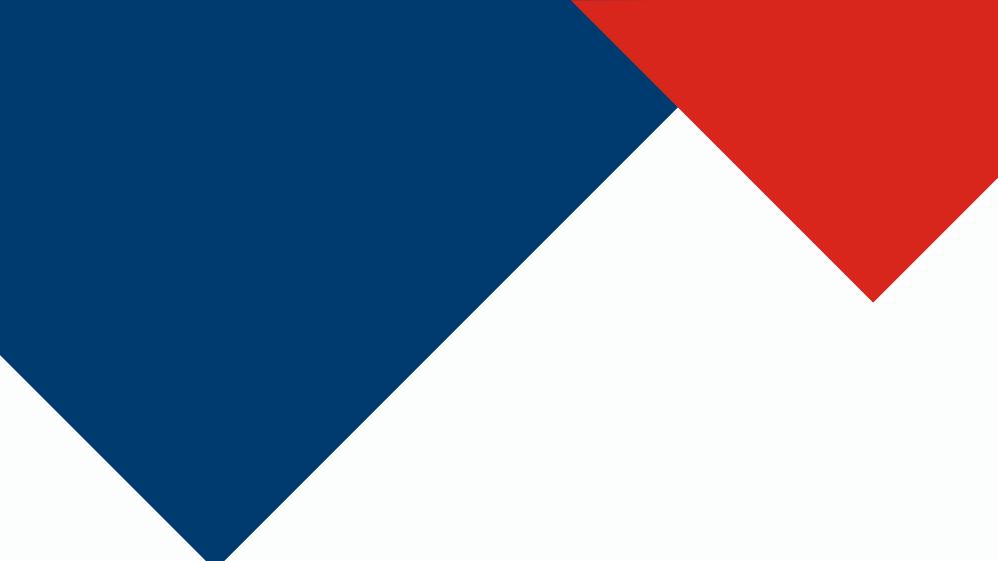
## Machine learning model



# Natural Language Processing



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Donec quis erat et quam.



# **Additional features for the banker**

1. Build an app that caters to both clients and bankers
2. Drive client acquisition through a variety of trusted offerings
3. Strengthen client relations through personalised offerings and close-knit communities

**Lorem ipsum dolor sit amet.**

# **Image gallery from our work**

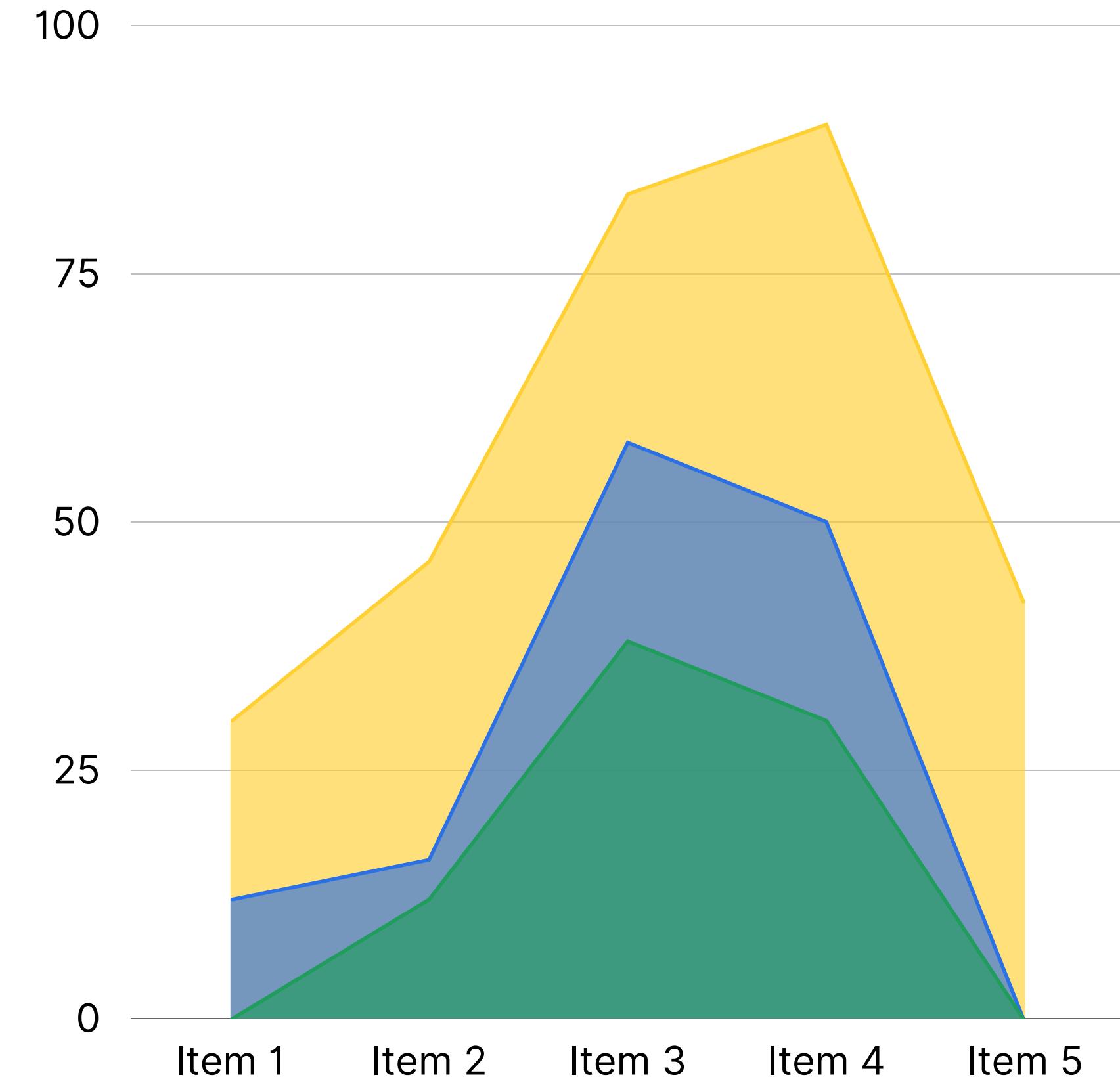


Lorem ipsum dolor sit amet.

# We leading finance and technology

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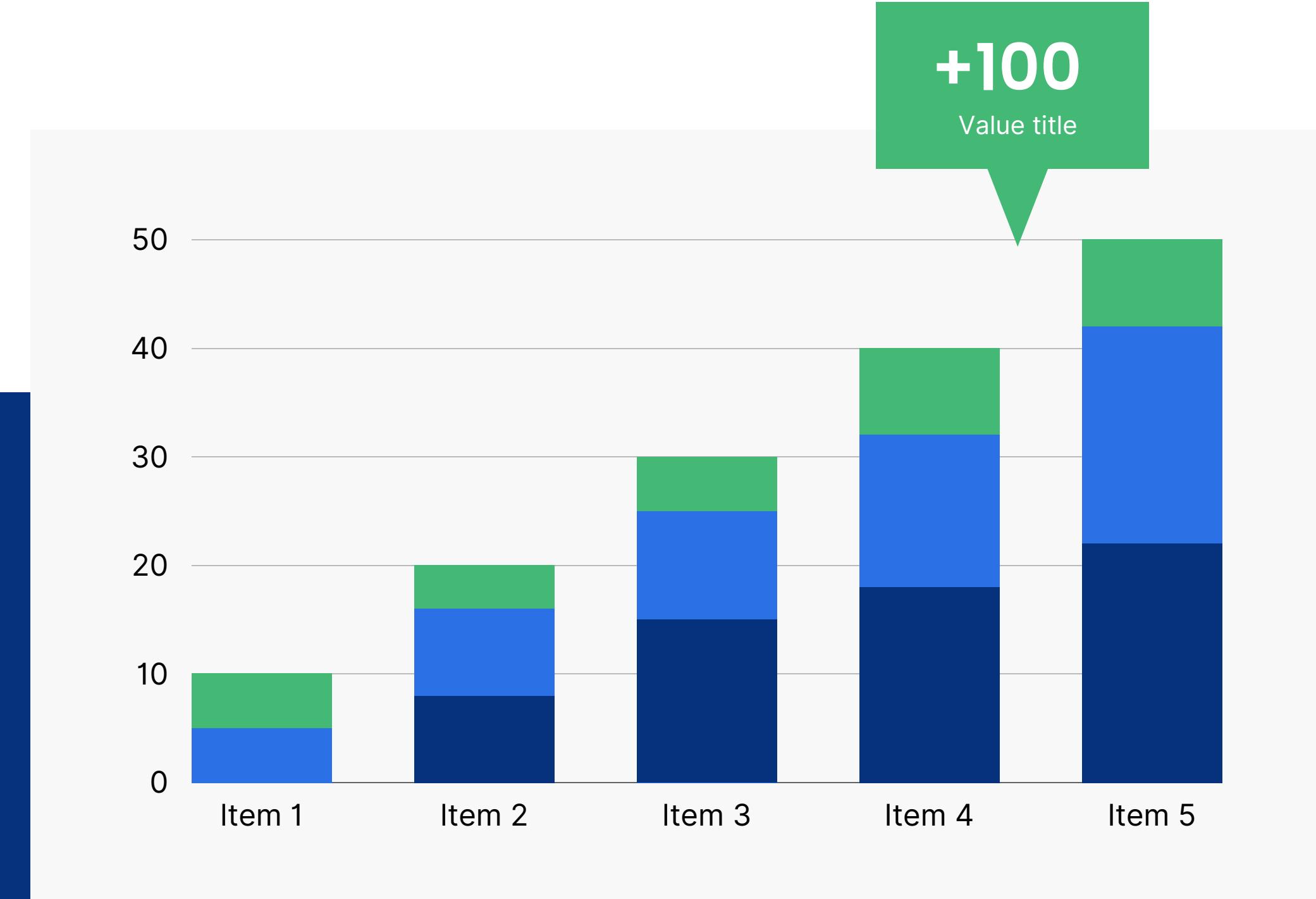


*Placeholder text*

# Markets latest in a years

**75%**

*Placeholder text*  
Placeholder text





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# We will rule the financial world

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## A Lacazette

Job description

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# What our customers say

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## Contact Us

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