I will create reports for the company Zerodha in the fintech sector.

1. Business & Market Understanding:

Zerodha is a discount brokerage firm based in India that offers retail and institutional broking services. It was founded in 2010 by Nithin Kamath and is headquartered in Bangalore, India. Zerodha has become one of the largest stockbrokers in India by number of clients, with over 5 million active clients and a market share of over 15%. The company operates on a discount broking model, where it charges a low flat fee per trade, as opposed to a percentage of the trade value.

The Indian stock market has seen significant growth in recent years, with the SENSEX and NIFTY indices reaching record highs. The Indian government has taken several initiatives to promote entrepreneurship, startups, and the capital market, leading to an increase in the number of investors. This has resulted in a growing demand for low-cost and efficient trading platforms, which Zerodha has been able to capitalize on.

2. BRD (Business Requirement Document):

Title: Implementing a Stock Portfolio Tracker Feature in Zerodha's Trading Platform

Objective: To enhance Zerodha's business by providing a stock portfolio tracker feature that will allow users to track and manage their investments in one place, thereby increasing user engagement and retention.

Requirements:

- A portfolio tab in Zerodha's trading platform, Kite.
- Option to add and remove stocks from the portfolio.
- Option to view the current price, gains/losses, and other relevant information for each stock.
- Option to view the overall portfolio performance in terms of returns, gains/losses, and other relevant metrics.
- Option to set price alerts and notifications for each stock.

3. PRD (Product Requirement Document):

Title: Implementing a Stock Portfolio Tracker Feature in Zerodha's Trading Platform

Product Description: A stock portfolio tracker feature that allows users to track and manage their investments in one place, thereby increasing user engagement and retention.

User Flow:

- Users log in to their Kite account.
- Users navigate to the portfolio tab.
- Users add stocks to their portfolio by entering the stock name or symbol.
- Users view the current price, gains/losses, and other relevant information for each stock.

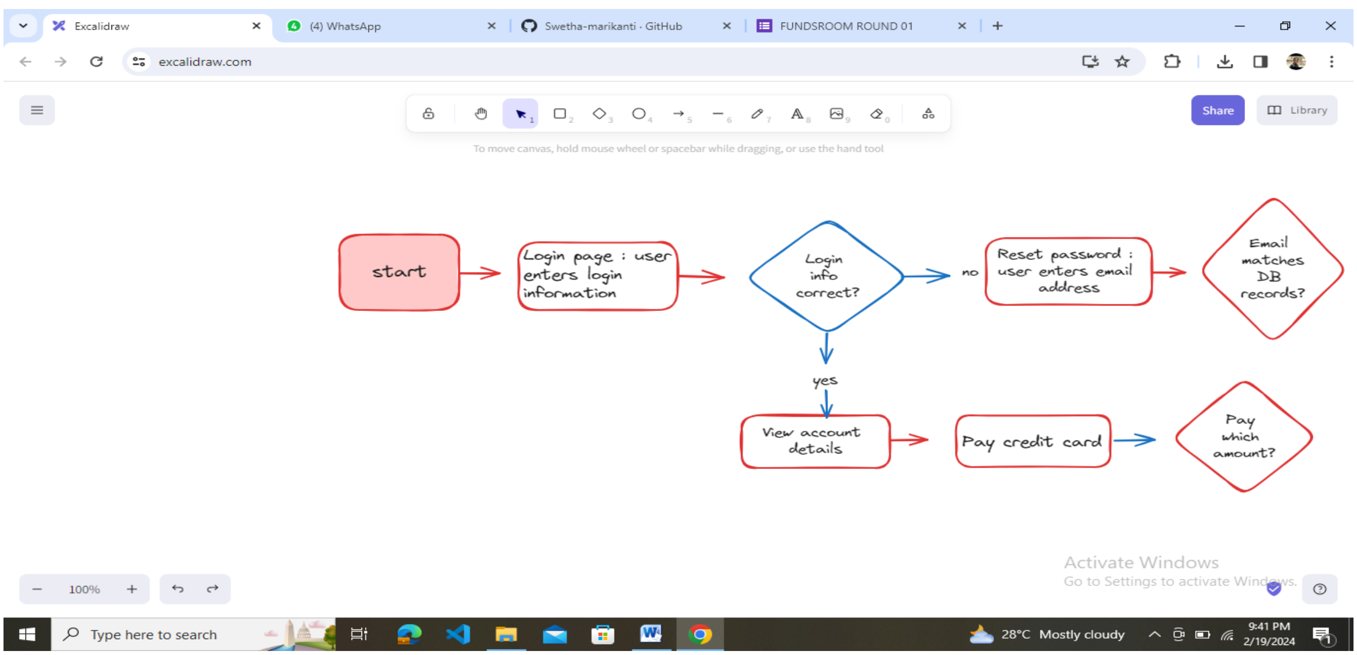
- Users view the overall portfolio performance in terms of returns, gains/losses, and other relevant metrics.
- Users set price alerts and notifications for each stock.
- Users can edit or remove stocks from their portfolio at any time.

Features:

- Option to add and remove stocks from the portfolio.
- Option to view the current price, gains/losses, and other relevant information for each stock.
- Option to view the overall portfolio performance in terms of returns, gains/losses, and other relevant metrics.
- Option to set price alerts and notifications for each stock.

4. User Journey & Workflow:

Please see the user journey and workflow created on Excalidraw below:



The user journey starts with the user logging in to their Kite account, followed by navigating to the portfolio tab. The user can then add stocks to their portfolio by entering the stock name or symbol. The user can view the current price, gains/losses, and other relevant information for each stock in their portfolio. The user can also view the overall portfolio performance in terms of returns, gains/losses, and other relevant metrics. The user can set price alerts and notifications for each stock in their portfolio. Finally, the user can edit or remove stocks from their portfolio at any time.

The workflow involves the user interacting with the various components of the portfolio tracker feature, including the add/remove stock functionality, the current price and gains/losses information, the overall portfolio performance metrics, and the price alert and notification settings. The workflow should be designed to be intuitive and user-friendly, allowing users to easily track and manage their investments.