

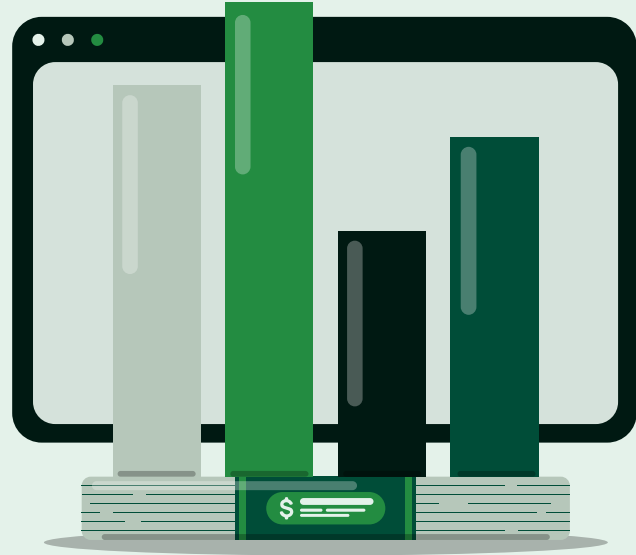


SwissBorg

GOLDEN THEMATIC Performance Analysis



FIRST WEEK RESULTS





Golden Thematic Release

The Golden Thematic product was introduced to provide users with an innovative investment opportunity, enhancing their overall experience on the SwissBorg platform. To evaluate its success, we have identified several metrics that measure adoption, engagement, business impact and risk mitigation.

Product Release Date
2023-07-18

Period of Analysis
2023-07-18 to 2023-07-25



Golden Temathic KPI



386

Unique Users

21.3%

Users Engagement Rate
(% of Overall Transactions)

U\$ 982.35
Average Amount per Transaction

1.25
Average Transaction per Users

U\$ 446,970.62

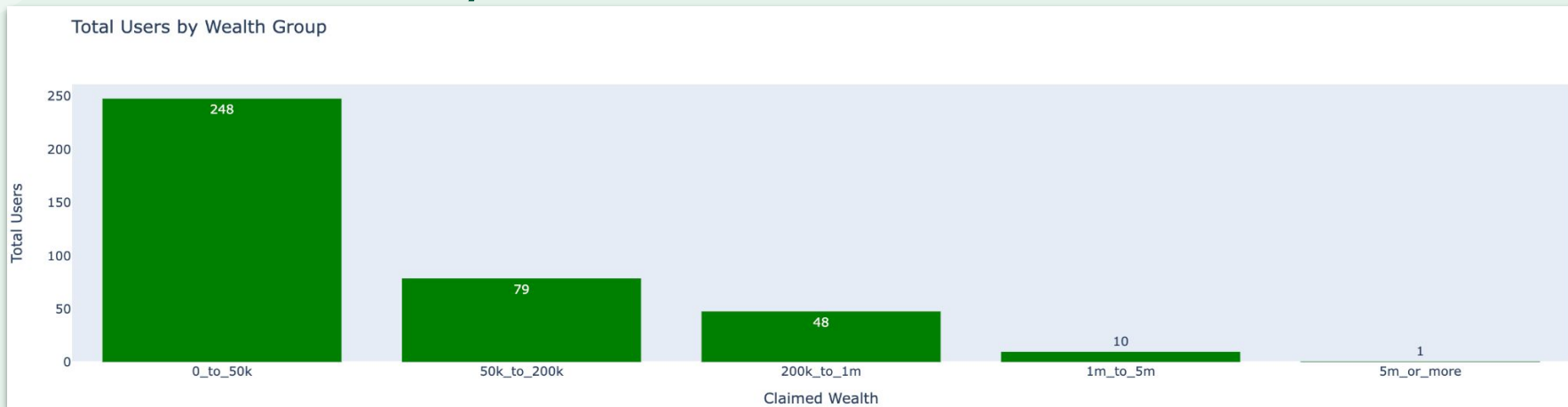
Transactions Total Amount

Indicators by Country

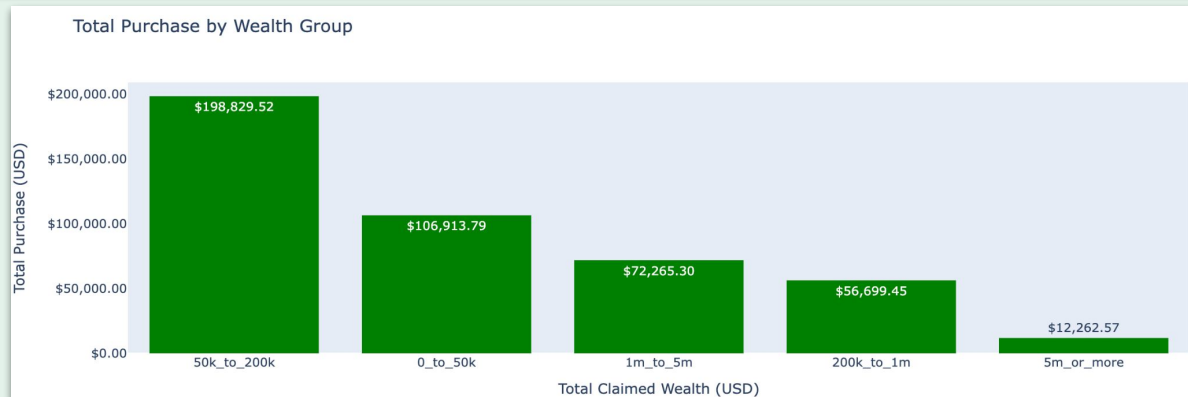


Users from countries **FR, CH, GB and DE**
represent **84%** of total users engaged on Golden Thematic products and
spent together a total of **U\$ 343,143.83**

Indicators by Wealth

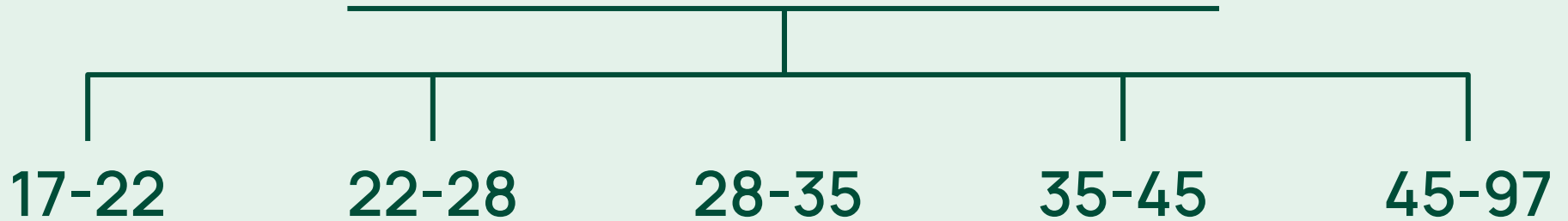


Most users engaged are from
a lower Wealth group.



AGE DISTRIBUTION

5 GROUPS WERE IDENTIFIED

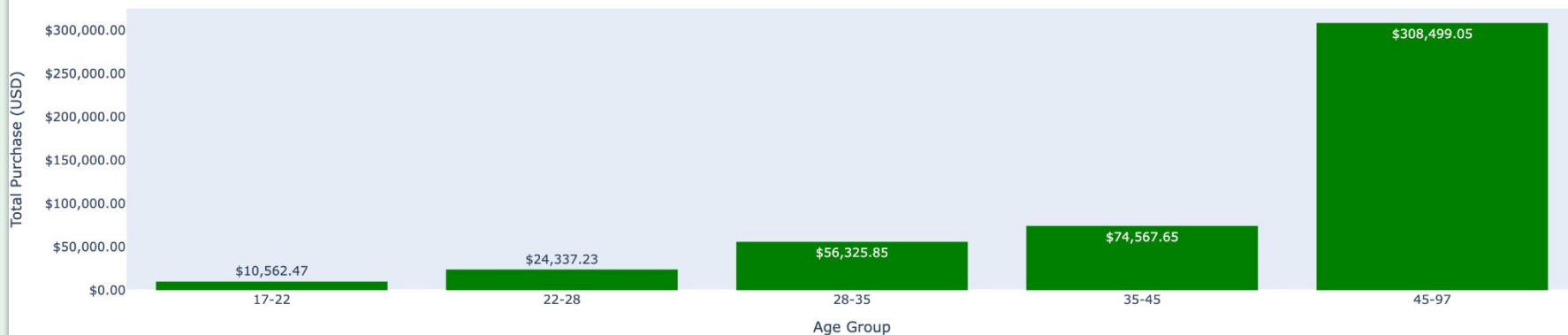


The were User Data file was divided in quantiles to preserve the distribution.
Each group represents 20% of all users* present on dataset.

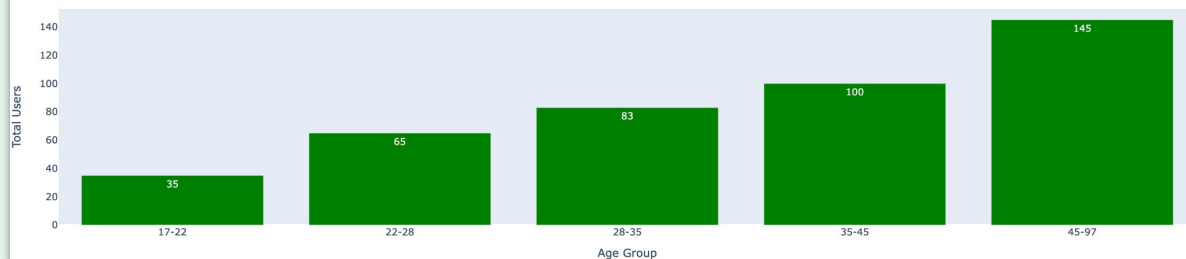
*Some users contain age over 100 years. They were removed and considered as typo.

Indicators by Age

Total Purchase by Age Group



Total Users by Age Group



Most users engaged are 45 to 97 years old.

Their Engagement Rate is **33.6%**. 9 p.p. above the other group



TARGET ACHIEVEMENT

Indicators Target

Metric	Pessimistic	Realistic	Optimistic	Achieved 1st Week
Engagement	500 users in the first month	1,000 users in the first month	2,000 users in the first month	386
Frequency	1 transaction per user per month	2 transactions per user per month	3 transactions per user per month	1.25
Average Transaction Volume	\$100 per user per month	\$250 per user per month	\$500 per user per month	\$982.35

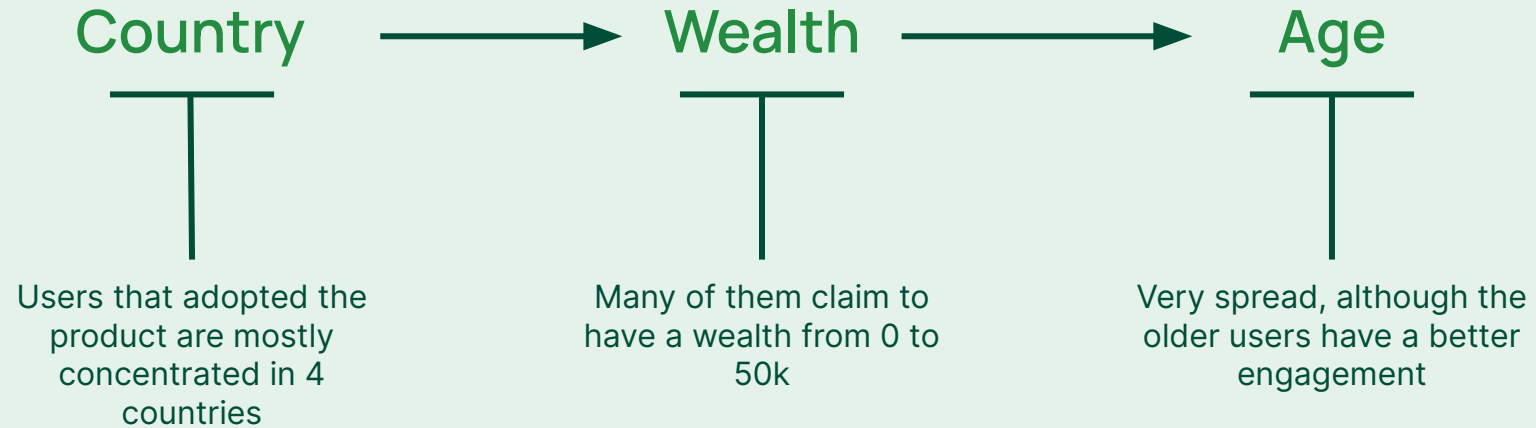
COHORT

TOP 5 Most Engaged Groups

Country	Wealth	Age	Users	G.T* Purchase	Retention	Engagement
FR	0_to_50k	45-97	25	\$15,501.96	1.12	36.2%
CH	0_to_50k	22-28	21	\$12,508.97	1.52	28.8%
FR	0_to_50k	22-28	21	\$3,729.46	1.19	32.8%
CH	0_to_50k	22-28	18	\$13,308.98	1.33	29.5%
FR	50k_to_200k	45-97	17	\$9,939.83	1.05	53.1%
		Total	102	\$54,989.2		

*G.T - Golden Thematic

PATTERNS



IMPROVEMENT ACTIONS

- **Dashboard**
 - While Python and SQL are very powerful tools, a dashboard has the potential to democratize the information further.
- **Initial Feedback Survey**
 - Look for patterns in their responses, such as common pain points, features they particularly liked, or areas where they found the product lacking.
- **A/B Test**
 - Different marketing messages
 - Pricing strategies
 - Product features
- **Social Media Listening**
 - Monitor social media channels and online forums for mentions of the Golden Thematic product. Pay attention to both positive and negative feedback, and use this information to guide future marketing campaigns and product updates.
- **Analysis of longer period**
 - Understand if the distribution remains the same in the first month or if the product started showing a better adoption in other countries and groups
- **New Metrics**
 - Churn rate
 - CLV
 - Funnel
 - ROI
 - RFM (Recency, Frequency and Monetary) cohort

CONCLUSIONS

The initial adoption of the Golden Thematic product is off to a promising start, but there's always room for improvement.

While we're seeing concentrated usage in certain countries, this presents both an opportunity for growth and a chance to enhance our communication strategies across diverse geographic regions.

Overall, the initial results of the product are very encouraging.