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Intro ITWS

Professor Plotka

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Team 7 Marketfi Personas

Persona 1 - Bob Enweaven

Bob Enweaven is a fresh college graduate working as a software engineer at Amazon. He wants to make some extra money by trading stocks, but due to the heavy workload from Amazon, he doesn't have enough time to learn and understand how to properly trade stocks. Bob can use Marketfi to give him suggestions on what stocks to potentially invest in so he doesn't have to do the research himself. The app will also ping him whenever a stock reaches a certain threshold for selling that Bob sets himself so he won't have to constantly check the markets during his busy schedule. He finds out about our website through his friend, Joe Schmoe and he decides to check it out. According to Joe, Bob can start trading stocks on the side while not compromising on his busy work schedule at Amazon with the help of Marketfi.

When Bob reaches the Marketfi web app, he immediately sees a signup and a login option along with an about the app paragraph under the main banner. He decides not to read the paragraph because he hates reading. He clicks sign up and creates an account as instructed. After creating an account, he is immediately presented with a survey. This survey will help determine his level of expertise and also how much money he wants to allocate to this endeavor. He answers the survey, saying that he is very new to stock trading and he wants to allocate \$1,500 dollars to stocks and he is told that he can change this at any time. After filling out the survey, he is presented with a list of stocks that are best suited for him and surprisingly he knows most of

the companies being shown. He sees that he can set up thresholds for the stocks he is interested in, and when the stocks reach those thresholds his phone will notify him. Lastly, he notices a section in the navigation bar called Learn where he can learn more.

Persona 2 - Joe Schmoe

Joe Schmoe is a more experienced stock trader who works in the finance industry already. He has a very fleshed out investment portfolio, but due to his increasingly busy work schedule, he does not have the time to constantly monitor the markets and keep track of data for all the different investments he currently has. Marketfi can also be used by advanced users like Joe to simplify the monitoring of his investment portfolio by keeping track of any relevant information for him, and pinging him whenever something needs attention such as if a stock price suddenly changes drastically.

When Joe visits our web app, he will be immediately greeted with a landing page with a sign up or login option. Since he is a new user, he will click the sign up page. After creating an account, he will also be greeted with a survey about his experience level and investment goals, as well as his current stock portfolio to start watching. Because Joe is already an advanced user, he might not use the investment tips and learning sections of the web app as much as a new user would, but those sections would still be available to him if Joe ever wants to pick up new investing strategies or brush up on knowledge he hasn't used in a while.

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