

CONTEXTUAL INQUIRY, TASK ANALYSIS & ROUGH SKETCHES

DAVID MCLAREN, MATTHEW APPLEBY, DAVID KHAVARI, AND AARON SEKHRI

2800 COMPANIES
\$18 TRILLION



DISCRETIONARY INVESTOR

INVESTORS WHO JUDGE COMPANIES ON THE
BASIS OF QUANTITATIVE AS WELL AS
QUALITATIVE FACTORS

BRIDGE EIMON / JOHN HOCHSTATTER / JASON VAN DER MERWE

MASTER/APPRENTICE



CONTEXTUAL ANALYSIS
EDUCATED,
AMATEUR,
MOTIVATED



CONTEXTUAL ANALYSIS

AFFILIATION



INSIGHT (!)

IRRESPECTIVE OF
EXPERIENCE, A PERSONAL
CONNECTION TO THE
INDUSTRY OR COMPANY
IS A CONSTANT

TASK ANALYSIS

HEARING PAST THE NOISE

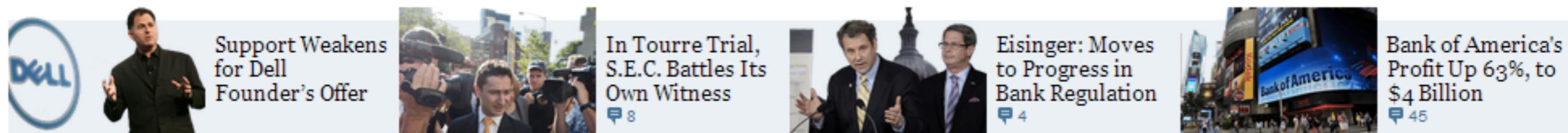


TASK ANALYSIS

THE BEST INFORMATION?

[Home](#) | [Business Day](#) | [Video](#)

[Log In](#) | [Register Now](#)



DealBook

WITH FOUNDER
ANDREW ROSS SORKIN

MERGERS & ACQUISITIONS

INVESTMENT BANKING

PRIVATE EQUITY

HEDGE FUNDS

I.P.O./OFFERINGS

VENTURE CAPITAL

LEGAL/REGULATORY

The New York Times

SEARCH DEALBOOK

Go

JPMorgan in Talks to Settle Energy Manipulation Case for \$500 Million

BY BEN PROTESS AND JESSICA SILVER-GREENBERG

JPMorgan Chase is aiming to settle accusations by the Federal



Manuel Balce Ceneta/Associated Press

It is unclear whether FERC will pursue a separate action against Blythe Masters, a senior JPMorgan executive.

The Wire

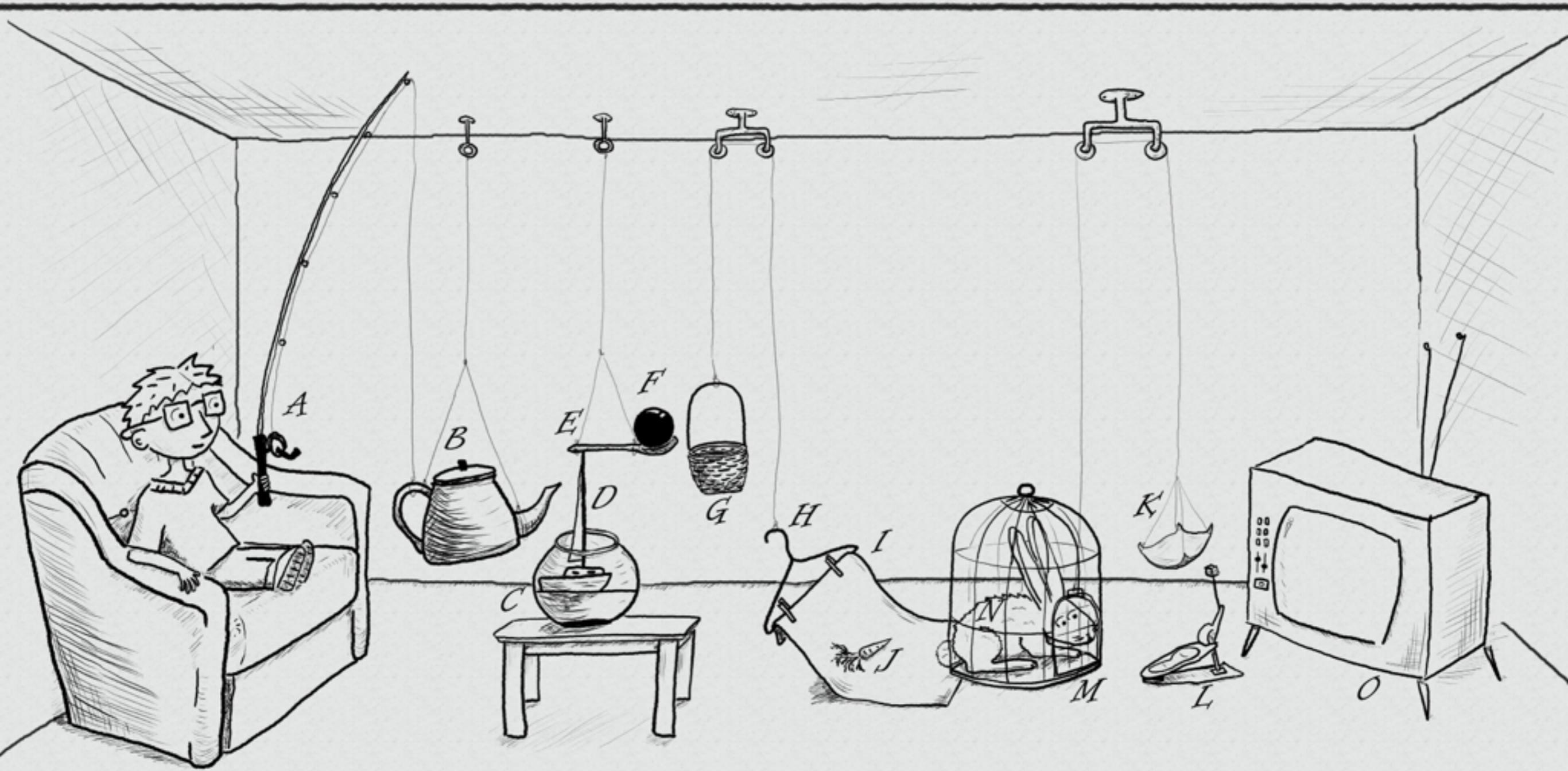
- | | |
|------------------------|---|
| JUL 18, 2:30 AM | Herms Sales Pick Up |
| WSJ.COM | |
| JUL 18, 1:46 AM | An Open Letter to the Media |
| NAKED CAPITALISM | #Snowden and Latin America |
| JUL 18, 1:31 AM | SAP Profit Up 10 Percent in Second Quarter |
| AP | |
| JUL 18, 1:04 AM | India toughens up on insider trading |
| FT | |
| JUL 18, 12:21 AM | Guardian Journalist to Write Book on Surveillance |
| NYTIMES | |

Morning Agenda With William Alden

- Bank of America Profit Surges

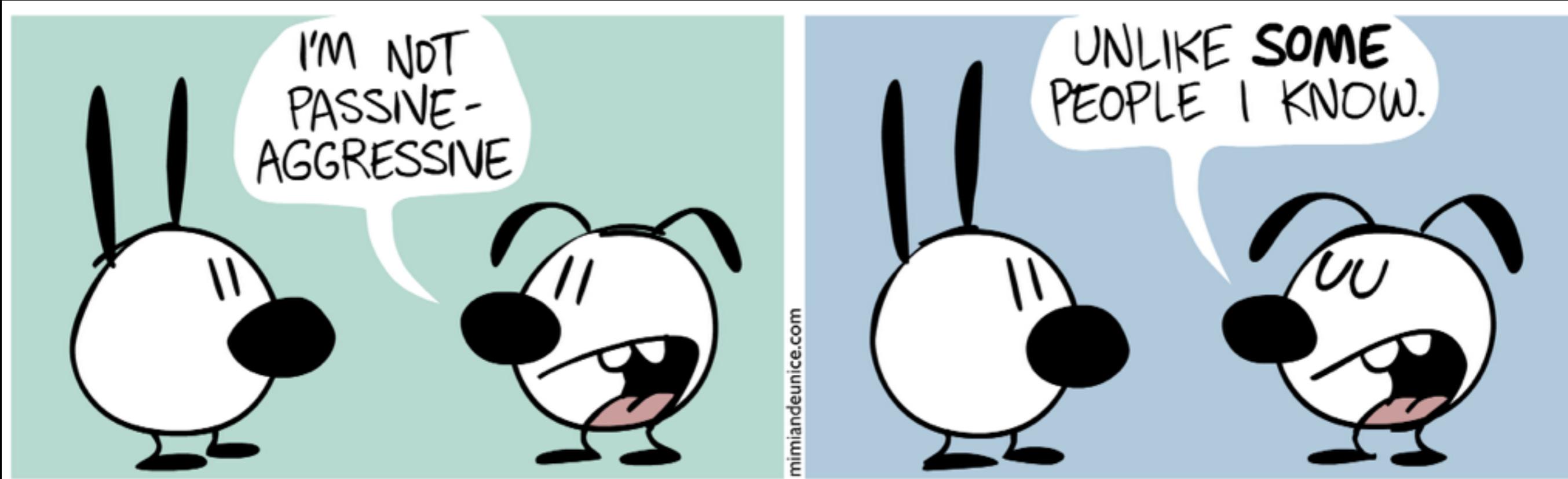
TASK ANALYSIS

OVER-COMPLICATION

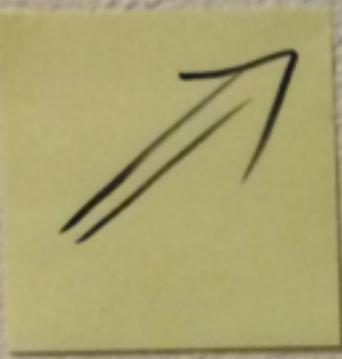


TASK ANALYSIS

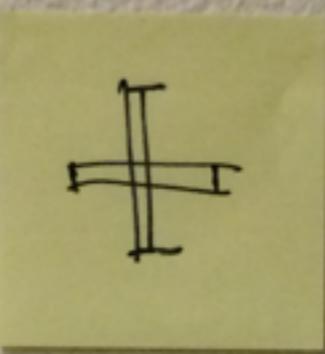
PASSIVE INVESTORS



Stock Discovery



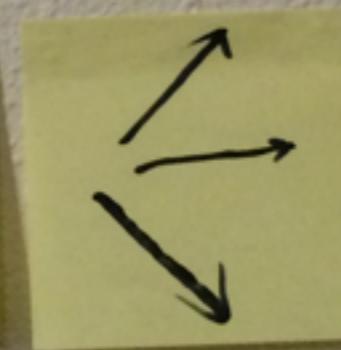
Manual



Random

Categorizing
Tiers

Recommended



New Stocks

Sorting by
other factors

Social

Same field
competitors

Illuminating
Relationships

OUR BEST IDEAS

THE FINAL
FOUR

SENTIMENT
ANALYSIS

PORTFOLIO
VIZ

STOCK
DISCOVERY

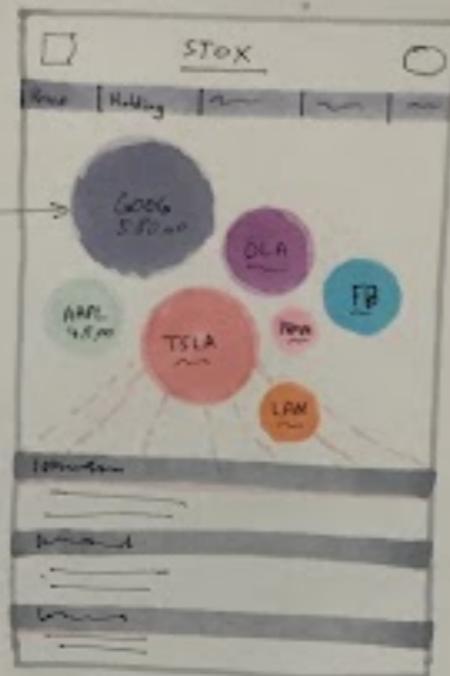
KNOWLEDGE

- DEFINITIONS
- SIMPLIFICATION
- PERSONAL FINANCE

MATT
APPLEBY

① Bubbles

Size of bubble represents proportion of your overall holdings DA proportional comparison of individual stock prices.



② Bars

STOX

DLA

TESLA

LAN

AAPL

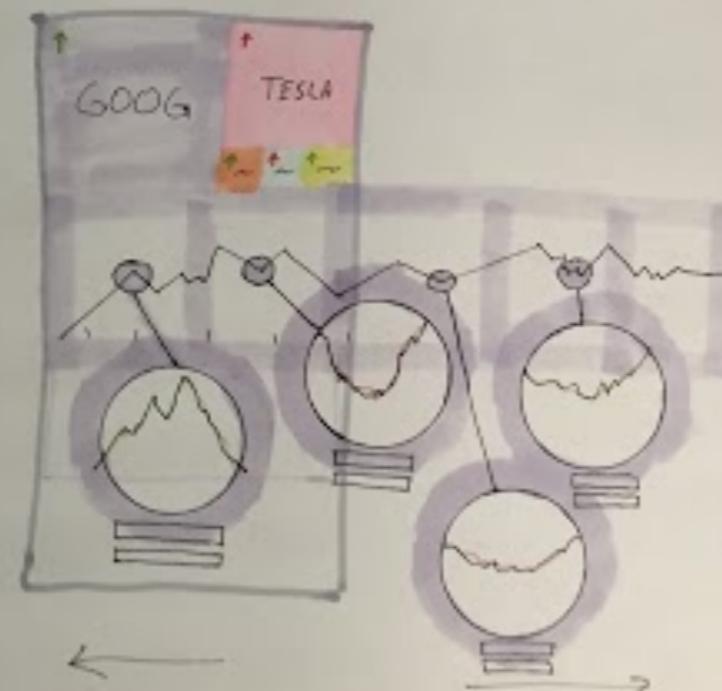
GOOG

→ Shape for more info

Bar-style
swapping thing.

③

③
NEWS
Bubbles



News bubbles

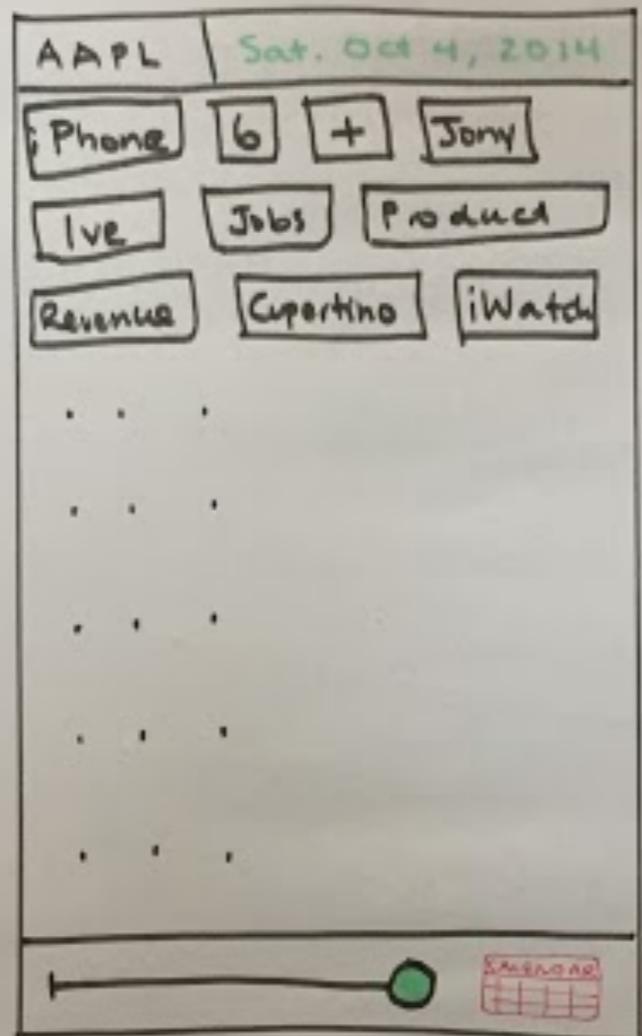
④

Word Storm
ideas
By David Khavari

Natural language
aggregation
relating to
a company

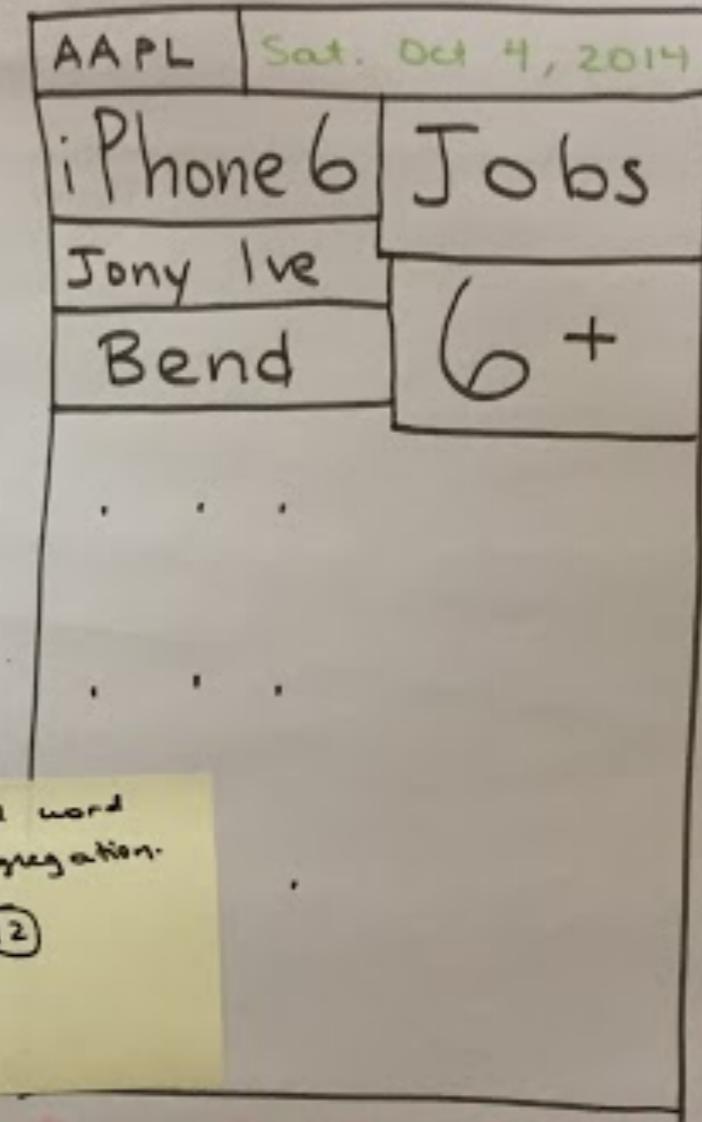
②

"Pure Word Aggregation"



DAVID KHAVARI
SKETCH #6

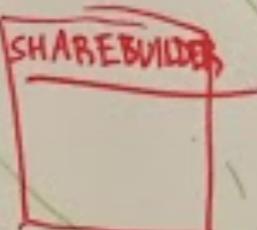
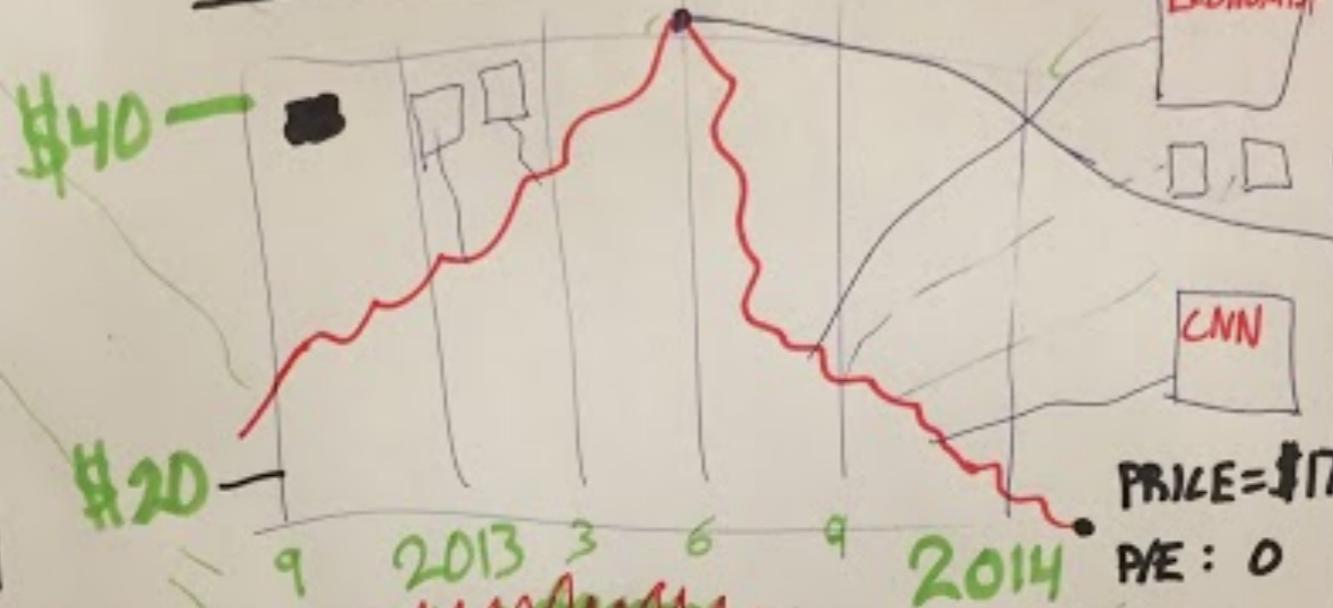
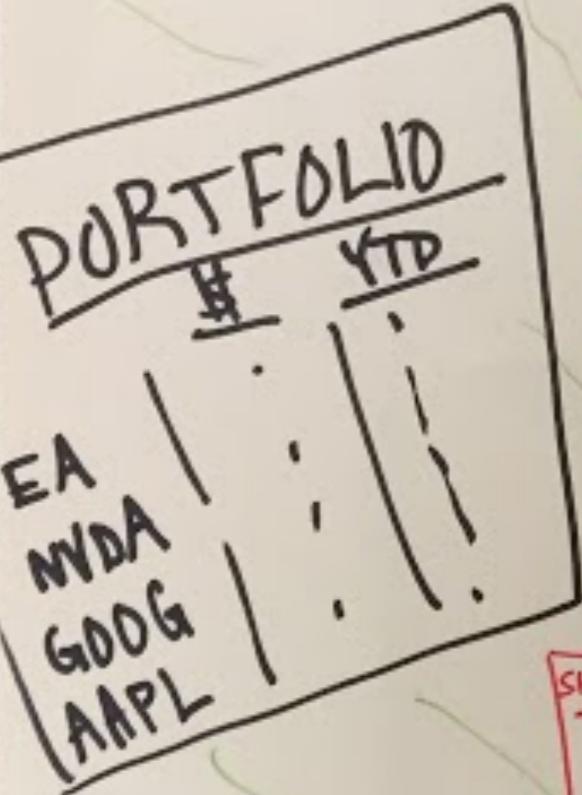
"Sized Word Aggregation"



DAVID KHAVARI
SKETCH #7

OCULUS BIIF

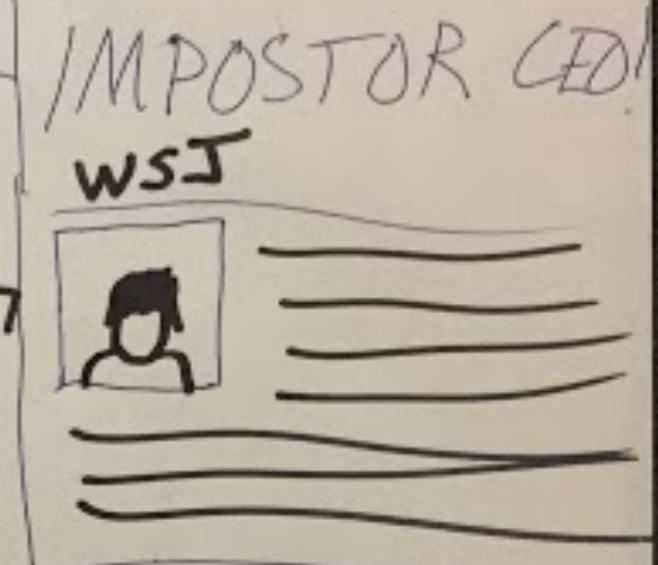
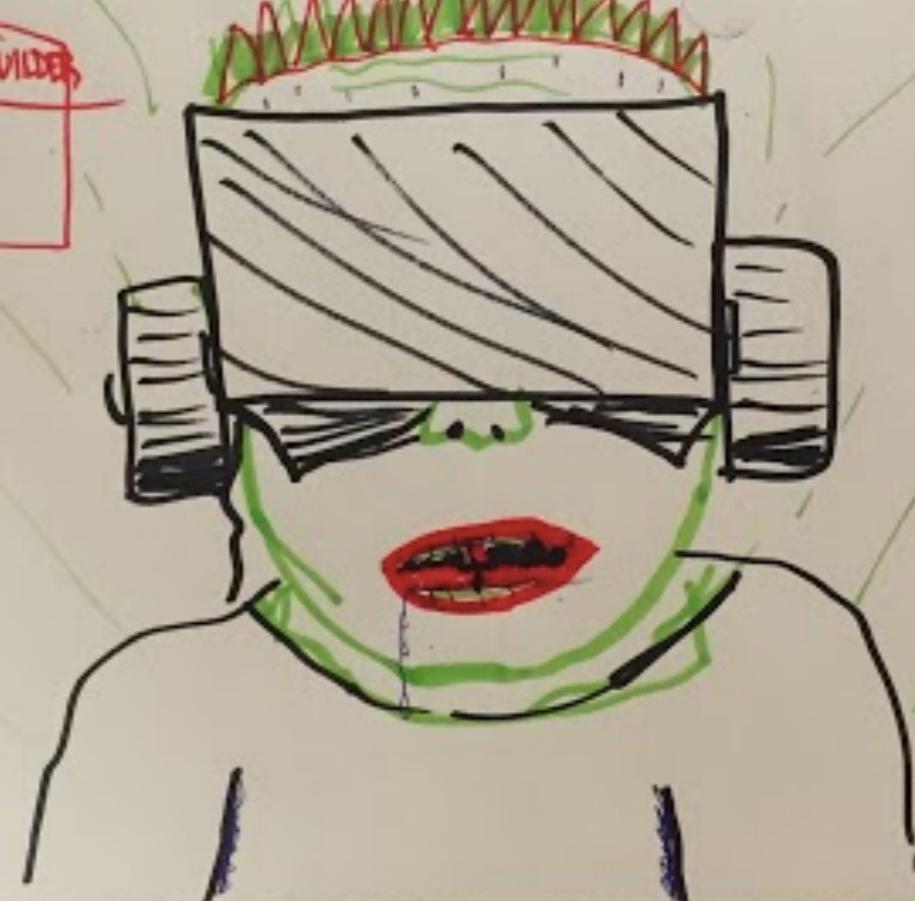
David McLaren
#7



FUNDAMENTALS

PRICE
P/E

...
:::
:::
:::



"On a scale
of 1-4."

STOCK
DISCOVERY

SENTIMENT
ANALYSIS

KNOWLEDGE
- DEFINITIONS
- SIMPLIFICATION
- PERSONAL FINANCE

PORTFOLIO
VIZ

Interest

Feasibility

Significance

4

3

4

2

1

2

3

1

4

3

3

2

WHAT IS YOUR
FAVORITE
COMPANY

APPLE

AUTO CORRECT

WHAT DO
YOU DO IN
YOUR FREE
TIME?

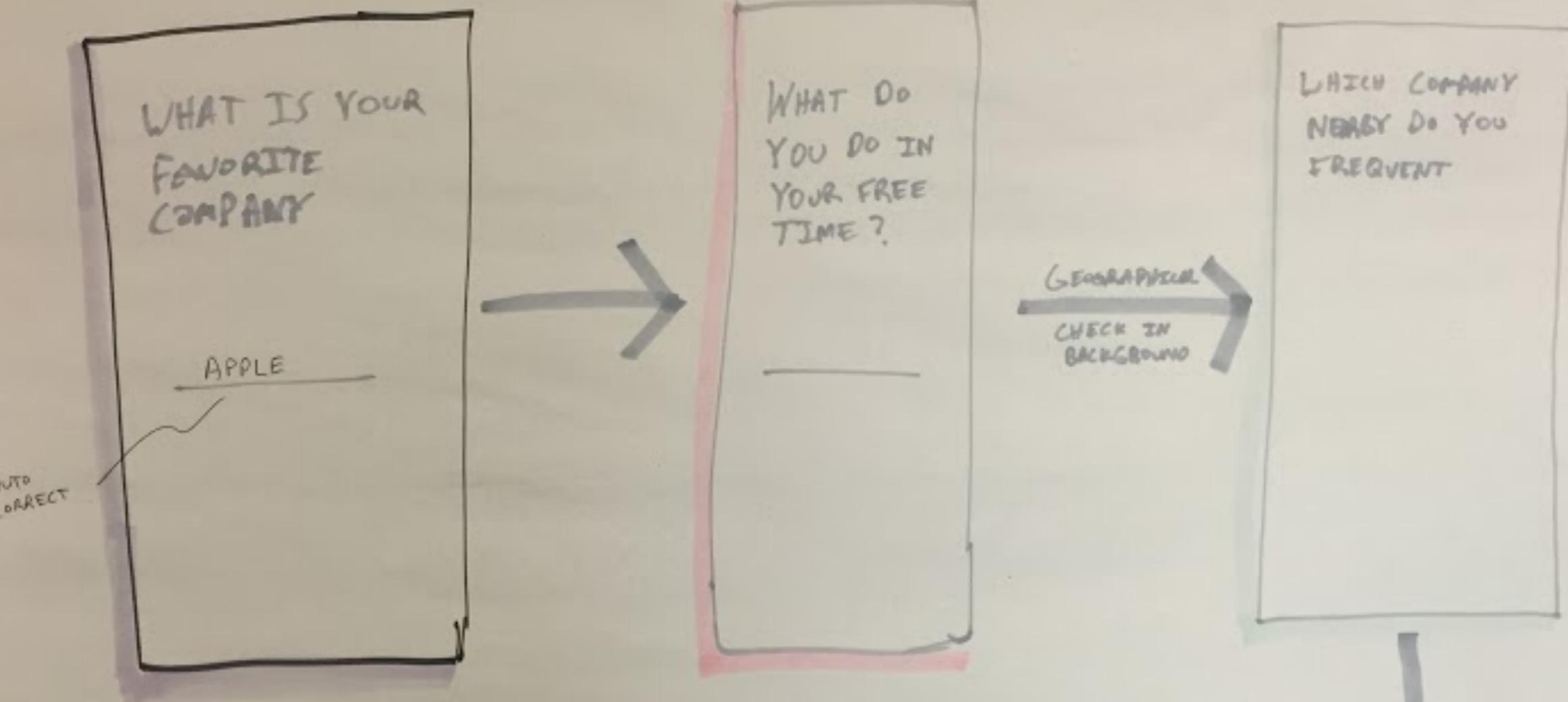
GEOSPATIAL
CHECK IN
BACKGROUND

WHICH COMPANY
NEARBY DO YOU
FREQUENT

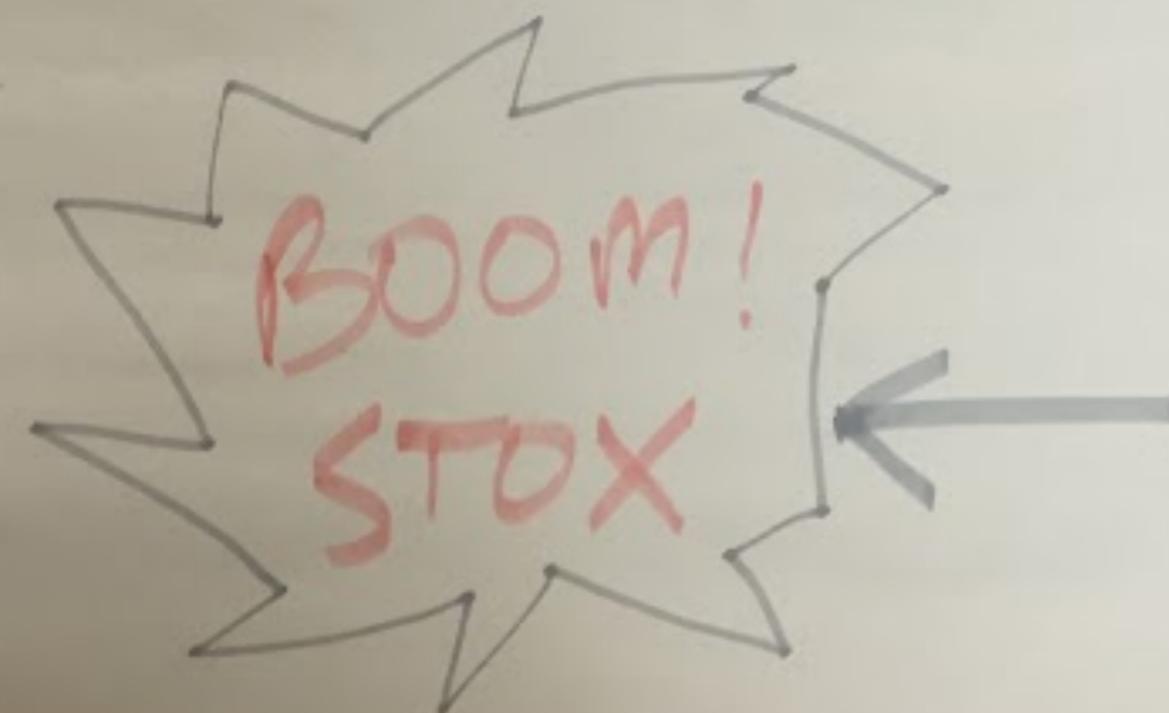
MATT
APPLEBY

BOOM!
STOX

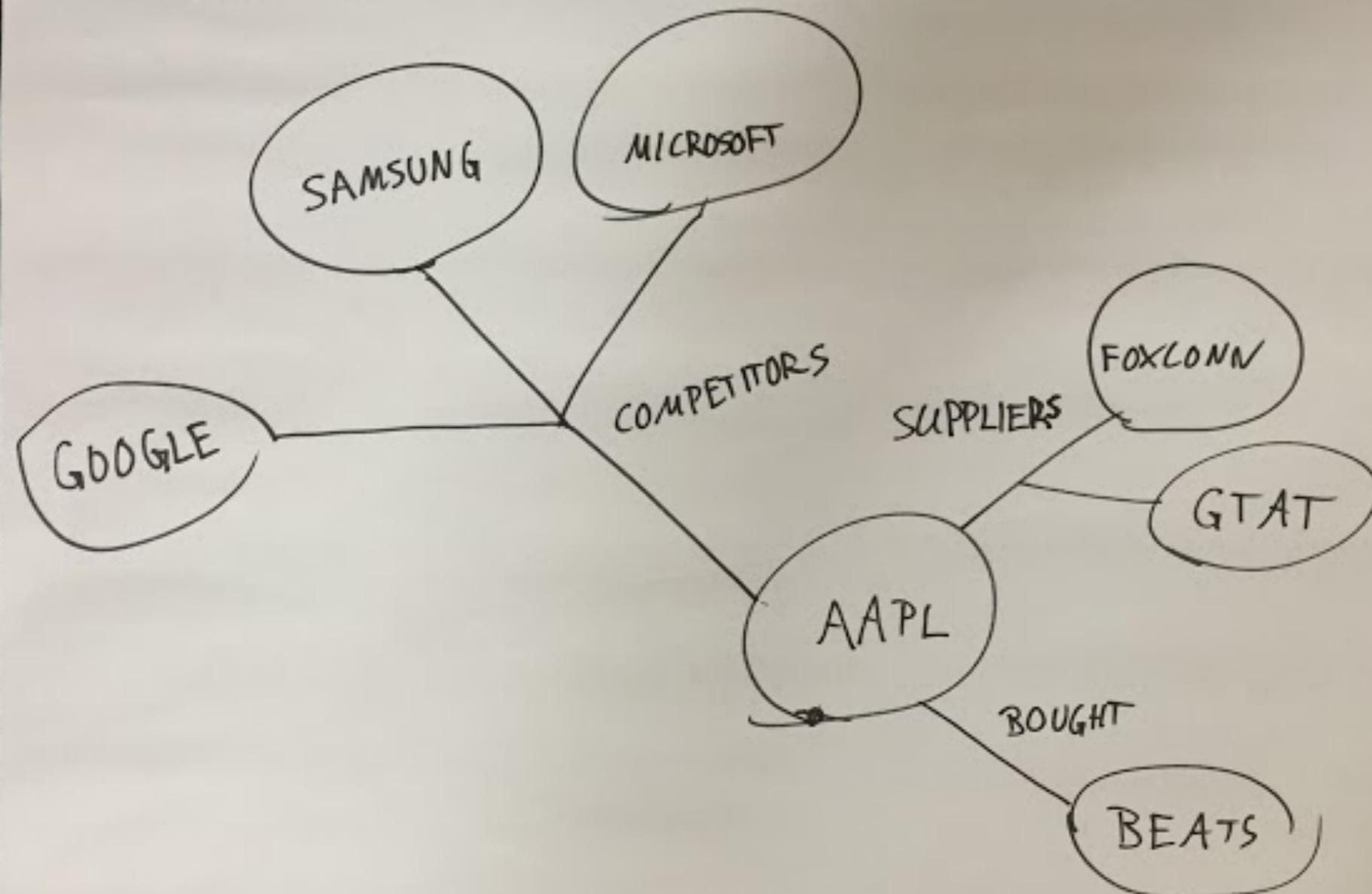
OTHER
QUESTIONS



MATT
APPLEBY



DISCOVERY



DAVID MCLAREN
#8