**📈 Product Requirements Document (PRD) – Trader’s Daily Intelligence Web App**

**🔍 Purpose**

**To build a full-day personalized trader assistant web and mobile app that delivers real-time, curated insights and trade ideas across pre-market, intraday, and post-market periods. This cross-platform application is aimed at helping traders make better decisions faster with relevant and personalized information, whether they are at their desk or on the move.**

**🧭 Product Structure Overview**

**The product is organized around four key content dimensions that define personalization depth:**

* **Owned Assets: Pulled from brokerage or manually entered.**
* **Followed Assets: Manually selected tickers the user wants to monitor.**
* **Likely to Be of Interest: Derived using LLMs based on user behavior, peers, and market overlap.**
* **Worth Considering: AI-recommended assets outside the user's current scope but relevant to their trading style or goals.**

**These categories power the entire user journey — from the dashboard display logic to alerting and trade idea recommendations.**

**🎯 Target Audience**

* **Active retail traders (equities, options, crypto)**
* **Intermediate to advanced users**
* **Users who track earnings, news, dividends, and market sentiment**

**🧠 User Experience (Full Journey)**

**☀️ Morning Pre-Market (Core Use Case)**

**When the user opens the app before market open:**

1. **"News You Should Care About"**
   * **Display macro news (e.g., economic data, geopolitical events, Fed updates)**
   * **Followed by news impacting assets the user owns, then follows, then likely cares about (based on past behavior, similar users)**
2. **"Top Movers"**
   * **Stocks and crypto with notable price movement overnight**
   * **Prioritized by: owned → followed → likely interested**
3. **"Upcoming Earnings"**
   * **Display upcoming earnings reports for:**
     + **Owned assets → Followed assets → Likely interested assets**
4. **"Dividend Dates"**
   * **Show ex-dividend and payment dates the user should know about**
   * **Prioritized by portfolio, watchlist, then algorithmically suggested stocks**
5. **"AI-Powered Trade Ideas"**
   * **Recommendations based on:**
     + **News, price action, earnings, technical setups, sentiment**
   * **Segmented by asset ownership/follow status and user profile**
   * **Tag each idea by conviction and time horizon (e.g., intraday, swing)**
   * **Clearly display "why suggested" for each idea**

**🕛 Midday Pulse (12–1 PM ET)**

* **Snapshot of intraday movement vs. morning expectations for stocks categorized as: owned, followed, likely to be of interest, and worth considering (based on user profile and AI recommendations)**
* **Alerts on unusual volume, reversals, breakout formations for stocks categorized as: owned, followed, likely to be of interest, and worth considering**
* **Reactions to economic releases**
* **Midday AI suggestions with risk/reward context**

**🕒 Power Hour Radar (3–4 PM ET)**

* **Highlight volume spikes, momentum shifts**
* **Trade setups into market close**
* **Final hour price action alerts**
* **End-of-day opportunity scanner**

**🌙 After Hours Wrap-Up**

* **Post-market earnings recaps for assets categorized as: owned, followed, likely to be of interest, and worth considering**
* **After-hours price movers (portfolio, watchlist, recommended)**
* **AI-powered prep for next day including news to watch at the economy, portfolio, watchlist and worth considering**

**🔔 Real-Time Alerts (Anytime)**

* **Breaking news (macro + asset-specific)**
* **Technical event triggers (breakouts, patterns)**
* **Unusual options activity / crypto flows**
* **Alerts personalized by asset type, urgency, and user control**

**🚪 First-Time User Experience & Onboarding Flow**

**🎯 Goals**

* **Gather high-quality user data to personalize the experience from day one**
* **Clearly differentiate between owned and followed assets**
* **Offer fast-track setup via broker integration**

**🧩 Onboarding Steps**

1. **"What kind of trader are you?" (multi-select)**
   * **Long-term investor**
   * **Swing trader**
   * **Day trader**
   * **Crypto-focused**
   * **Options trader**
2. **"Your experience level?"**
   * **Beginner**
   * **Intermediate**
   * **Advanced**
3. **"Trading goals?" (multi-select)**
   * **Grow long-term wealth**
   * **Generate short-term income**
   * **Hedge portfolio**
   * **Stay on top of market news**
   * **Learn from trade ideas**
4. **"Connect your broker (optional)"**
   * **Offer secure OAuth connection**
   * **Supported brokers: Robinhood, Alpaca, TD Ameritrade, Interactive Brokers (start with easiest)**
   * **Read-only data: holdings + watchlists**
   * **Allow user to review and confirm what to import**
5. **"Select what you own" (manual or imported)**
   * **Multi-select of tickers (autocomplete + logos)**
6. **"Select what you follow or watch" (manual or imported)**
   * **Separate screen with optional tickers**
7. **"Interest Tags (optional)"**
   * **Momentum trades**
   * **Earnings plays**
   * **Dividends**
   * **Thematic sectors (AI, Energy, etc.)**

**🧠 Post-Onboarding**

* **Land user on fully personalized Morning Brief**
* **Display a tooltip or coach mark: “This dashboard is built based on what you selected”**
* **Highlight that alerts and trade ideas will evolve based on ongoing usage**

**⚙️ Features Summary (MVP)**

**📊 Data & Integration**

* **Manual portfolio setup + optional brokerage API sync (OAuth)**
* **Real-time streaming data via APIs for prices, news, earnings, and crypto**
* **Personalized data stack:**
  + **Owned Assets**
  + **Followed Assets**
  + **Likely to Be of Interest**
  + **Worth Considering**

**🤖 AI & Recommendations**

* **AI-powered trade ideas with contextual reasoning**
* **News and market summaries tailored to portfolio and behavior**
* **LLM-generated “why suggested” explanations**

**💡 UI/UX**

* **Modular, time-specific dashboards (Morning Brief, Midday Pulse, Power Hour, After-Hours)**
* **Responsive design across web and mobile**
* **Card-style layout with swipe interactions on mobile**

**⚙️ Notifications & Preferences**

* **Real-time alerts via push/email/in-app**
* **User controls for:**
  + **Notification frequency**
  + **Alert categories**
  + **Depth of analysis**

**📱 Platform Strategy**

**Web & Mobile Support**

* **The application will be fully optimized for both web and mobile platforms.**
* **Mobile-first design approach for intuitive, on-the-go usage.**
* **Features will support native mobile app functionality, including:**
  + **Push notifications for real-time alerts**
  + **Swipeable card-style layouts for sections like Top Movers and Trade Ideas**
  + **Light/dark mode support**
  + **Offline caching for recent data summaries**

**Desktop experience will include:**

* **Enhanced visualization tools**
* **More detailed breakdowns (e.g., multi-column dashboards, tabbed views)**
* **Support for browser push notifications (opt-in)**

**🖥️ Frontend Stack Justification**

**To build a fast, responsive, and beautiful UI across web and mobile with high development velocity, the following frontend stack has been selected:**

**🧱 Framework: Next.js (React)**

* **Best-in-class React framework for routing, server-side rendering, and scalability**
* **Ideal for hybrid apps with static and dynamic content**

**🎨 Styling: Tailwind CSS**

* **Utility-first CSS framework for rapid UI development**
* **Fully responsive, mobile-first design**
* **Easy theme support (e.g. light/dark mode)**

**🧩 UI Components: shadcn/ui (Tailwind + Radix)**

* **Clean, composable, accessible components with built-in animation and behavior**
* **Based on Radix UI primitives**
* **Fully customizable to match a sleek, professional trading experience**
* **Designed for minimal bloat and high design consistency**

**🧱 Technical Requirements**

**Backend:**

* **APIs: Alpaca, Benzinga, CoinGecko, Yahoo Finance, etc.**
* **Real-time data via WebSocket-based APIs (e.g., Polygon.io, Alpaca, Benzinga) to receive streaming updates for prices, news, and market events. No need for custom event infrastructure at MVP stage—focus on direct integration with trusted APIs.**
* **AI/ML logic: start with simple rules and evolve using LLMs or reasoning models (e.g., GPT, Claude) to power trade idea explanations, news impact summarization, and personalized insights based on user behavior and holdings**
* **Secure authentication (OAuth for brokerage integration)**

**Frontend:**

* **Next.js (React) with Tailwind CSS**
* **Fully responsive, mobile-first dashboard**
* **Modular cards for each section**

**🛡️ Compliance & Legal**

* **Display clear disclaimers: "Not financial advice, for informational purposes only"**
* **User-level customization to opt-in/out of recommendations**
* **Early consultation with legal to define limits on trade suggestions**

**📊 KPIs for Success**

**📈 Module-Specific Metrics**

**Morning Brief**

* **Dashboard open rate pre-market**
* **AI trade idea engagement (views, saves)**

**Midday Pulse**

* **Midday return rate**
* **Volume alert interactions**

**Power Hour Radar**

* **Repeat visits in final trading hour**
* **Trade follow-through on end-of-day alerts**

**Real-Time Alerts**

* **Opt-in rates**
* **Notification open + click-through**

**After-Hours Wrap-Up**

* **Open rate of after-market summaries**
* **Daily active users (DAU)**
* **Repeat opens per day (multi-session usage)**
* **AI recommendation engagement (views, clicks, saves)**
* **Free to premium conversion rate**
* **Alert opt-in and open rates**

**🛠️ Next Steps for Development Team**

1. **Design UX/UI (Onboarding flow + Morning Brief layout)**
2. **Implement dummy data for prototype testing**
3. **Build News + Top Movers + Earnings widgets (hardcoded)**
4. **Begin integration of real-time data feeds (Alpaca/Benzinga/Yahoo, etc)**
5. **AI MVP logic: basic trade ideas based on technicals + news sentiment**
6. **Midday and Power Hour sections can reuse UI structure of Morning Brief**
7. **Notification system (email + in-app) architecture design**

**📅 Timeline & Phasing**

* **Phase 1 (Weeks 1–4): Onboarding + Morning Brief MVP**
* **Phase 2 (Weeks 5–8): Midday + Power Hour Modules**
* **Phase 3 (Weeks 9–12): Real-time alerts, AI improvements, brokerage integrations**

**💬 Slack Channel & Review Cadence**

* **#trader-app-dev for day-to-day**
* **Weekly check-in Fridays**
* **PRD updates to be reviewed asynchronously**