

Beginning Investors

1. Can you share your current understanding of finance and investing? What specific challenges or concerns do you face when analyzing stocks and making investments?
2. Can you describe your preferred learning style when it comes to understanding complex financial concepts? How do you typically seek information and educate yourself on new topics?
3. How comfortable are you with using technology, and what features do you believe are essential for an online investing platform to be user-friendly for someone with limited experience?
4. How would you describe your risk tolerance and investment goals?
5. What financial decisions do you find most challenging?
6. Describe to me a situation where you needed financial information to make a decision but you found it difficult to understand.

Individual Traders

1. What is your experience level in online trading, and what platforms have you used before? Can you identify any specific features in existing platforms that you find particularly useful or lacking?
2. How do you manage and organize your investment portfolio currently? Are there specific tools or features you wish were available to make this process more efficient?
3. Can you recall a specific instance where a trading platform feature significantly impacted your decision-making process positively or negatively?
4. How do you stay informed about market trends and news relevant to your investments?

Potential Traders

1. What factors are currently preventing you from entering the world of online investing?
2. What sources do you currently rely on for financial information, and how confident do you feel in interpreting and utilizing this information?
3. What are your expectations regarding the educational content of an online investing platform?
4. What role does financial literacy play in your decision-making process when considering online investing?

Educational Institutions

1. How are financial concepts currently taught in your institution? What resources do you find lacking in your teaching methods?
2. In what format do you usually deliver financial education content to your students? Are there any specific challenges you face in engaging your students in financial topics?
3. What are key learning outcomes you aim to achieve when teaching financial concepts?

1. What is a feature/mechanic from previously used financial software that you didn't like (enhanced your user experience).
2. What is a feature/mechanic from previously used financial software that you liked (enhanced your user experience).
3. When investing what company information do you use to make decisions on trading
4. What kind of company news would you like to know to make decisions on trading?
5. If news is displayed to you about a company, how many articles/stories/facts would you prefer to see?
6. What features would the ideal financial dashboard need to have for you to consider using it?
7. What features would a dashboard have that would deter you from using it?
8. How would you use an AI chatbot in a financial software application?
9. What are your concerns with an AI chatbot in a financial software application?
10. What kind of notifications would you hope to receive about your trading stocks?
11. What kind of notifications tend to be useless to you when trading?
12. What is a major factor in your decision to remove a stock from your portfolio?
13. What is a major factor in your decision to add a stock to your portfolio?
14. When searching for stocks, what filters do you use?
15. What kind of financial history do you use to analyze stocks?