Stakeholder Personna

The primary stakeholders for this project are portfolio managers, quantitative analysts, and institutional investors who aim to enhance their equity selection process. These users care about generating superior risk-adjusted returns, reducing reliance on discretionary judgment, and improving the robustness of their investment strategies. They are particularly interested in models that can be validated historically, scaled across multiple stocks, and integrated into larger portfolio management systems.

For portfolio managers, the key concern is how the factor model contributes to performance and risk management. For quantitative analysts, the focus lies in the methodology, data transformations, and statistical validity of the factors. Institutional investors care about the long-term consistency and scalability of the strategy, as well as how it aligns with broader investment objectives. By addressing these needs, the project provides actionable insights and tools that can directly support investment decision-making.