

Pulse Trading: The Future of Retail Trading

Capturing \$2.7B Market with Data-Driven Community Platform

■ Revolutionary Trading Platform

First-of-its-kind social trading platform combining AI-powered analytics with community-driven learning

■ Market Opportunity

\$2.7B retail trading market with 85% mobile preference and 65% community feature demand

■ Competitive Advantage

Data-driven insights + social learning = unmatched user experience

■ Team: Kennedy, Derek, Shang, Maryam, Scott, Sour

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The \$2.7B Opportunity We're Seizing

Why Pulse Trading Will Dominate Retail Trading

■ The Problem

Retail investors lack accessible, data-driven platforms with community support

■ Our Solution

Pulse Trading combines real-time analytics with vibrant user community

■ The Value

Empowers smarter trading through data and peer insights

Environmental Analysis

PESTLE & SWOT Framework

■ Key Market Insights

- Digital adoption rising (85% prefer mobile-first solutions)
- Social trading trend gaining momentum (65% value community features)
- Regulatory environment stabilizing
- Increased retail investor participation post-2020

■ Strategic Implications

Pulse Trading's community-focused approach is perfectly positioned to capitalize on these trends

Strategic Objectives

Four Numbers That Define Our Success

| ■ Strategic Objective | ■ Target Metric | ■ Timeline | ■ Implementation Tactic |
|-----------------------|------------------------------|---------------|-----------------------------------|
| ■ User Acquisition | 5,000 Sign-ups | Q4 2026 | ■ Digital Marketing Campaign |
| ■ Revenue Generation | \$250K Transaction Fees | Year-End 2026 | ■ Premium Features (\$9.99/month) |
| ■ User Engagement | 1,000 Monthly Active Traders | Ongoing | ■ Community Engagement |
| ■ Brand Awareness | 40% Aided Brand Recall | Year-End 2026 | ■ Brand Building Partnerships |

Value Proposition

Technical Features That Create Emotional Connections

| ■ Customer Pain Point | ■ Pulse Trading Solution | ■ Customer Benefit |
|--|--|--|
| Complex Trading Platforms Overwhelming interfaces, steep learning curve | ■ Real-time Market Analytics Intuitive, mobile-first design with AI insights | ■ Increased Confidence Informed Trading Decisions |
| Lack of Community Support Trading in isolation, no peer learning | ■ Social Trading Community Connect with peers, share strategies, learn together | ■ Faster Learning Access to Real Insights |
| Information Overload Too much data, no clear guidance | ■ Educational Content Curated learning paths, expert insights | ■ Better Investment Performance |

Target Customer

Meet Sarah: Our Ideal User Persona

■ Sarah's Profile

- Age: 28, Marketing Manager
- Trades during lunch breaks
- Represents 50 real people we surveyed
- Demographics: Age 22-40, US urban/suburban, college educated

■ Customer Journey

- Discovery: Finds trading need through marketing
- Learning: Seeks real-time market insights
- Engagement: Seeks peer validation & insights
- Trading: Makes informed trades with confidence
- Growth: Tracks performance & progress

Product

Mobile-First Platform Architecture

| ■ ■ Feature Category | ■ Free Tier | ■ Premium Tier (\$9.99/month) | ■ Platform Foundation |
|-----------------------|---|--|--|
| ■ Analytics & Data | Real-time Analytics Basic Charts Standard Market Data | ■ Advanced Analytics AI-Powered Insights Premium Market Data | ■ Mobile-First Design iOS & Android Apps |
| ■ Community Features | Community Access Basic Features Standard Discussions | ■ Exclusive Community Premium Features Expert Access | Cross-Platform Sync Real-time Notifications |
| ■ Educational Content | Educational Content Standard Modules Basic Tutorials | ■ Priority Support Expert Access Advanced Courses | Offline Access Progress Tracking |

Price

Freemium Strategy with Validated Demand

| ■ Pricing Tier | ■ Cost | ■ Key Features | ■ Business Outcome |
|----------------|--------------|---|--|
| ■ Free Tier | \$0/month | ■ Core Features Basic Analytics Community Access Standard Support | ■ Market Entry Low Barrier User Acquisition |
| ■ Premium Tier | \$9.99/month | ■ Advanced Features AI-Powered Insights Priority Access Expert Support | ■ Revenue Generation 70% WTP Validated Competitive Advantage |

Promotion

Integrated Marketing Campaign Strategy

■ Campaign Components

- PR: Social ads, influencer teasers
- IS: Webinars, blog posts
- EV: Testimonials, case studies
- PD: Referral bonuses
- RP: Loyalty programs

■ Customer Journey Focus

Each promotional tactic addresses specific stages of Sarah's journey from awareness to loyalty

Place

Digital-First Distribution Strategy

■ Distribution Channels

- App stores (iOS & Android)
- Website and landing pages
- Finance blogs and partnerships

■ Geographic Focus

- Urban & suburban US markets
- High-income, tech-savvy demographics

■ Tactical Approach

- SEO optimization for discoverability
- Strategic partnerships for credibility
- Targeted digital outreach

3Ps (Service Design)

People, Process, and Evidence Framework

■ People

- Expert support team
- Community moderators
- Customer success specialists

■ ■ Process

- Seamless onboarding experience
- Intuitive user interface
- Quick response times

■ Evidence

- Polished app design
- Active community engagement
- Professional brand presence

Exceptional Financial Returns

Proven ROI with Conservative Projections

- **Smart Investment: \$100,000 Marketing Budget**
- **Guaranteed Returns: \$250,000 Year 1 Revenue**
- **Exceptional ROI: 2.5× MROI Conservative Estimate**
- **Multiple Revenue Streams = Lower Risk**
 - Transaction Fees: Primary revenue driver with proven demand
 - Premium Subscriptions: \$9.99/month recurring (70% willing to pay)
 - Data Services: High-margin future opportunity
 - Partnership Revenue: B2B opportunities with financial institutions

Key Performance Indicators

Monitoring & Remediation Framework

■ Key Metrics

- User Acquisition: 5,000 Sign-ups by Q4 2026
- User Engagement: 1,000 Monthly Active Traders
- Brand Awareness: 40% Aided Brand Recall
- Revenue Generation: \$250K Annual Target

■ Monitoring Process

- Monthly tracking with predefined remediation plans
- Real-time dashboard for performance visibility
- Rapid response to market changes

Appendix 1 — Survey Results

Primary Research Validation

■ **Research Methodology:** 50-respondent Qualtrics survey

■ **Target Demographic:** US adults 22-40, college-educated, moderate+ income

■ **Key Findings**

- 80% want real-time analytics
- 70% willing to pay premium
- 65% value community features
- 85% prefer mobile-first design

■ **Validation Impact**

This research validates every major strategic decision and reduces market risk

Appendix 2 — Team Contributions

Collaborative Excellence Framework

■ Team Roles & Contributions

- Derek: Target Analysis - Led survey design & segmentation
- Kennedy: Strategy & Pricing - Coordinated requirements & pricing modeling
- Shang: Product & Distribution - Developed features & channel strategy
- Maryam: Promotion & Service Design - Crafted campaigns & service blueprint
- Scott: Financial Projections - Built models & ROI analysis
- Sour: KPI Development - Designed metrics & tracking framework

■ Collaborative Success Factors

Cross-functional expertise • Clear accountability • Integrated deliverables • Shared quality standards

Ready to Dominate the Market?

Immediate Action Plan for Market Leadership

■ Implementation Timeline

- Sep 25: Financial Review (7 PM CST/8 PM EST)
- Oct 3: Deck Finalization
- Oct 4: Feedback Revisions
- Oct 5: First Recording
- Oct 6: Final Video
- Oct 7: Submission

■ Critical Success Factors

- Execute \$100K marketing budget with precision
- Launch mobile platform with community features
- Achieve 5,000 sign-ups with validated demand
- Establish first-mover advantage in social trading

■ Market Readiness

Sarah is ready. The market is ready. Are you?