

Thematic Marketing

Investment Platform

Created By : Jojo



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Introduction

Investment startup are application that allow us to buy or sell mutual fund such as stocks , bond, money market, and mixed-investment mutual fund





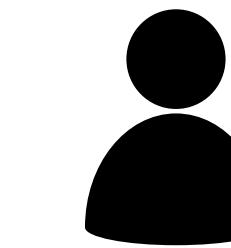
Problem

Marketing team need our help to give an idea what kind thematic campaign should we make in the next month

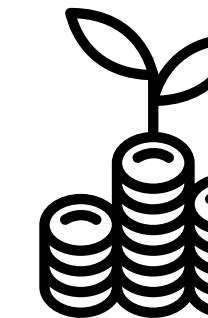
Our customer profile



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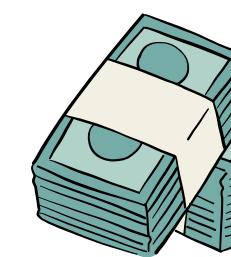
We have **6.666 users** on our platform with **64% male, 36% female** and the majority are from **GenZ (11-26 years old)**



Our user preferred using **mixed-investment mutual funds** than other funds



The trend of user **buying** our product are **decreasing** from August'21 to September'21 but on the other hand users who **sold** our product are **decreasing**



The **daily activity** of our users besides mixed-bond **remains stagnant**. However, in mixed-bond, there are mixed **trendlines** which are **increasing** from **August to September**.

The majority of our user **income source** is from **Salary** and the **income range** is **less than 10 million / month**

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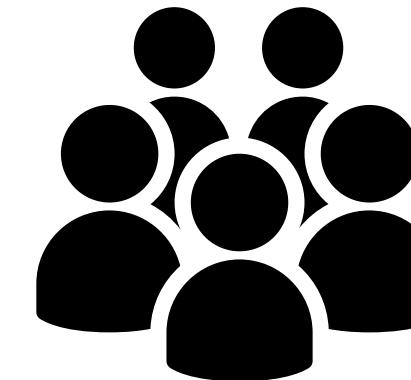
Segmentation : Mixed-Bond

Reason we use Mixed Bond only due to this product are more preferable for our user in term of total investment, average buy in our user, and trend of buying.

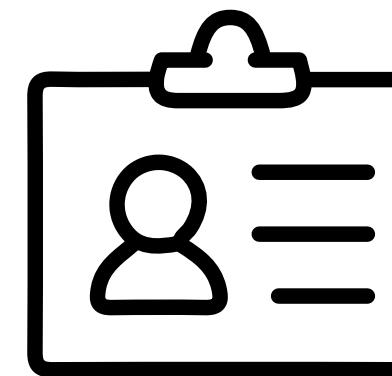
Hence, we will do segmentation for Mixed Bond only. Also we decide there will be 3 cluster for this segmentation

Check Appendix for reasoning and EDA

Cluster 1 : FOMO Investor



For **FOMO Investor**, we have **8.909 users** with **63% of transactions** being from **female users**, **34%** of them using **referrals** and **62%** of them are **genZ** and 31% are **millennials**.



The majority of **occupations** are from **Students (56% of the population)**, **Private Employees (21% of the population)**, **Other (13% Population)**



On **average** they spend **6.358** with a **maximum** investment are **1.300.000** and from this cluster, they already **invest 56.649.000**

04



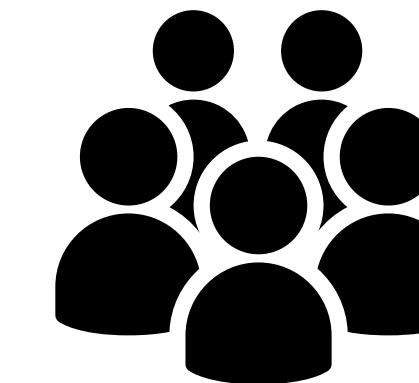
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Check Appendix for reasoning

Cluster 2 : Angel Investor



For Angel we have **49 user**, **51% transaction** are from **female**, **42%** using **referrals**, while **49%** are from **millennial** and **36%** are from **GenZ**



The majority of **occupations** are **Students (38% of the population)**, **Private Employees (28% of the population)**, **Others (18% Population)**



On **average** they spend **2.751.889** with a **maximum** investment are **15.000.000** and from this cluster, they already **invest 134.842.582**

04



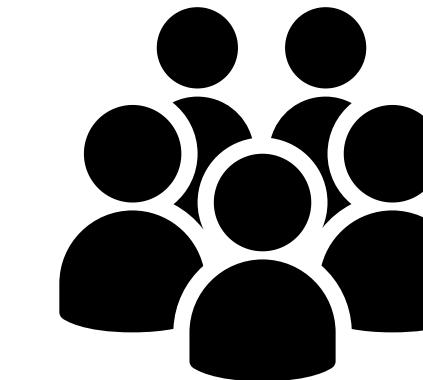
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Reason we use Mixed Bond only due to this product are more preferable for our user in term of total investment, average buy in our user, and trend of buying.

Hence, we will do segmentation for Mixed Bond only. Also we decide there will be 3 cluster for this segmentation

Check Appendix for reasoning

Cluster 3 : White Shark Investor



For White Shark it only has 20 users with **55% of the transaction** are from **female**, **20%** using a referral, 50% from **GenX**, **35%** being **millennial** and **15%** from **GenZ**



The majority of **occupations** is **IRT (30%)**, **Private Employee (35%)**



On **average** they spend **9.950.000** with a **minimum** investment are **80.000.000**, and a **maximum** investment is **110.000.000** from this cluster they already **invest 199.000.000**

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Thematic Campaign

After we create segmentation its show that majority of user are FOMO and majority of investment money are coming from other segmentation.

Solution 1 : Webinar for investment



Firstly, we know that the **majority** of our users are from **GenZ** and we know that some of our goals are to become **financial freedom**.

Hence, providing a **webinar/talk show** about the **importance** of **investment** could **trigger** our users who are only a **student** to start **investing** especially when the majority of our user are from FOMO

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Thematic Campaign

After we create segmentation its show that majority of user are FOMO and majority of investment money are coming from other segmentation.

Solution 2: Offer for Investment Opportunities



We can create **collaboration** with **financial service** for creating **investment cashback** which could fill in for our user segmentation which is minimum payment is 500.000 (**FOMO users** have a **maximum** invest **1.300.000**, which this amount should be saved for all user segmentation to join)

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Post - Campaign Strategy

In order to ensure success in our campaign strategy, we need to have metrics to ensure to determine success of our strategy

Engagement Rate

How many of our users actually want to join talkshow / click to invest.

Conversion Rate

How many of user actually do the conversion an invest in our platform after our thematic campaign are launched

Proposed Timeline

Phase 1 (Talkshow): End of February 2023

Phase 2 (20% offer): Full month of March

Phase 3: Data gathering and analysis to ensure the success of our campaign strategy

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Contact Us :



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[Linkedin](#)

Jakarta, Indonesia

A faint, grayscale image of a city skyline with numerous skyscrapers of varying heights, creating a professional and modern feel.

Thank You for Watching

