MUTUAL FUNDS
DATA ANALYTICS ROADMAP

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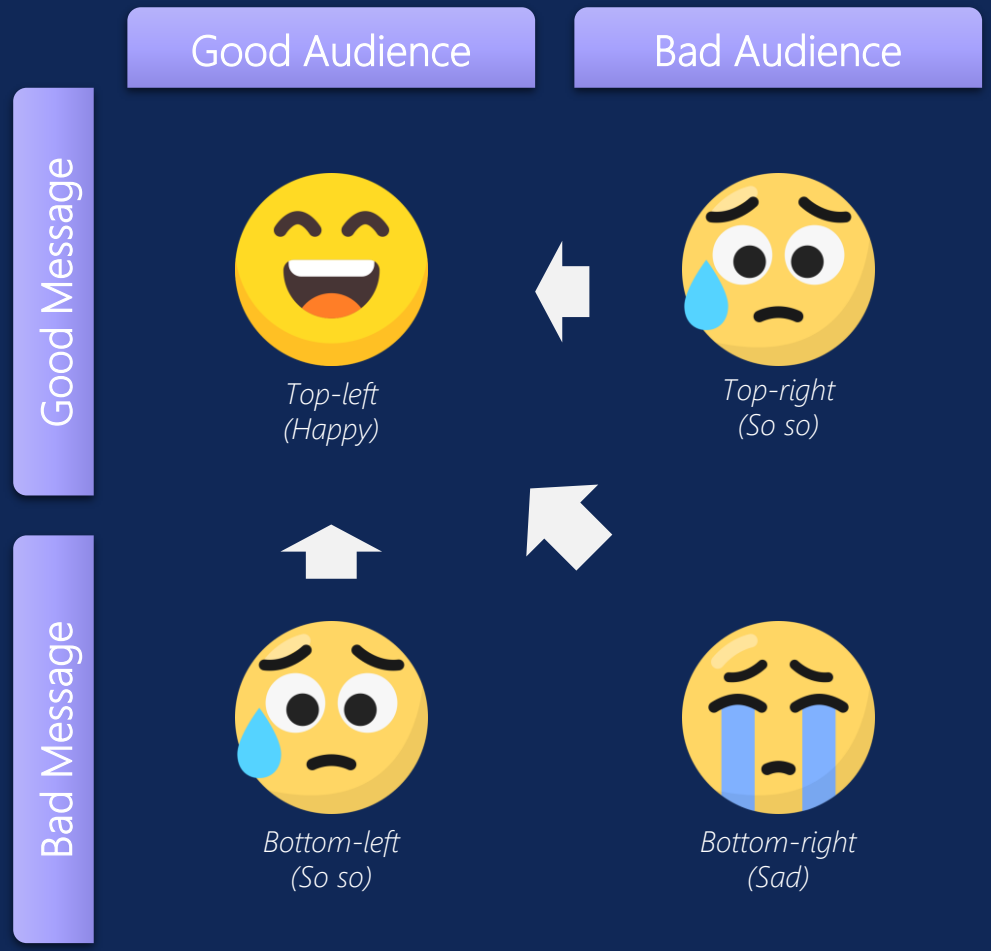
ROLE OF DATA SCIENCE IN MARKETING IS TO PREDICT TARGETED AUDIENCES

Choice of marketing & audience

Option 1 (Bottom-right)
- Send a message to all customers on our platform.
- Potential issue: This may overwhelm customers, leading to attrition.

Option 2 (Top-right and Bottom-left)
- Send a message to customers with specific attributes that align with the message content.
- Potential issue: While it reduces bombardment, it may also miss interested customers who don't fit the specified attributes.

Option 3 (Top-left)
- Data Science Approach.
- Send a message only to customers likely to be interested.
- Benefits: Minimizes overwhelming customers while maximizing reach to those genuinely interested.



APPLY DATA SCIENCE IN EVERY STAGE OF CUSTOMER JOURNEY

4 "M" framework

Make them signup

- Invite them at the right time.

Make them engage

- Provide content based on their needs.

Make them buy

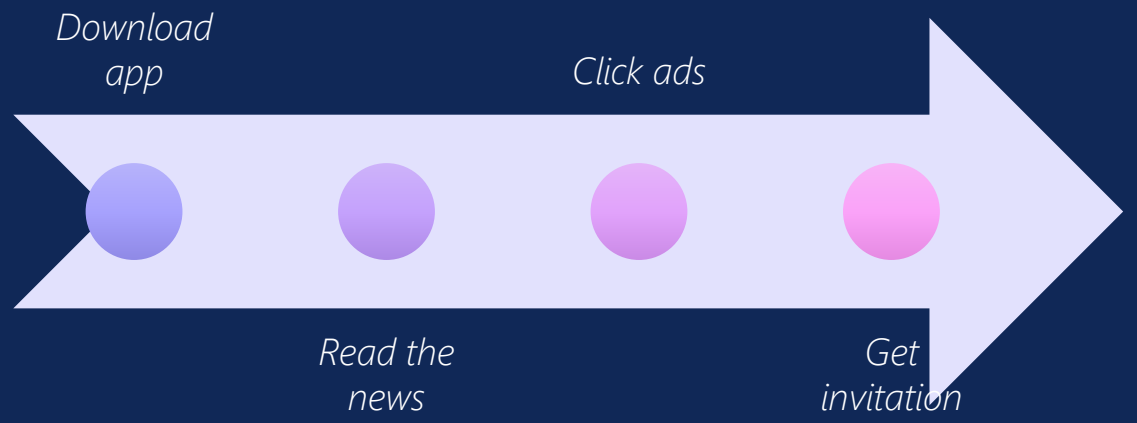
- Offer the right product.
- Offer it at the right time.
- Offer with the right message.
- Avoid overselling.

Make them stay

- Recognize redemption signal.
- Understand the investment ending period.

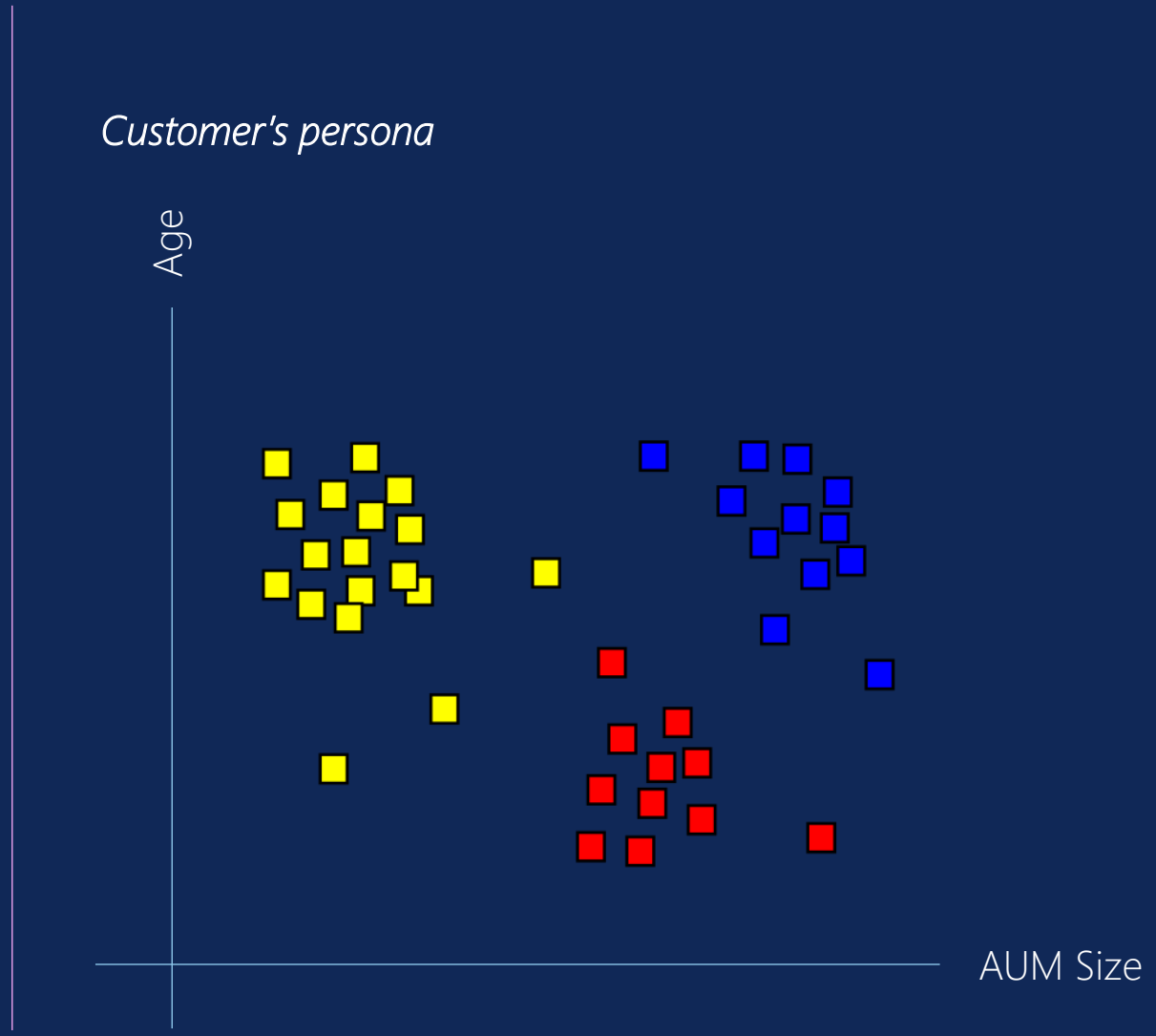
DETECT SIGNALS AND INVITE CUSTOMERS AT THE RIGHT MOMENT

Sign-up signal



MAKE THEM SIGN UP

SEGMENT CUSTOMERS AND CREATE CONTENT COVER ALL PERSONA'S NEED



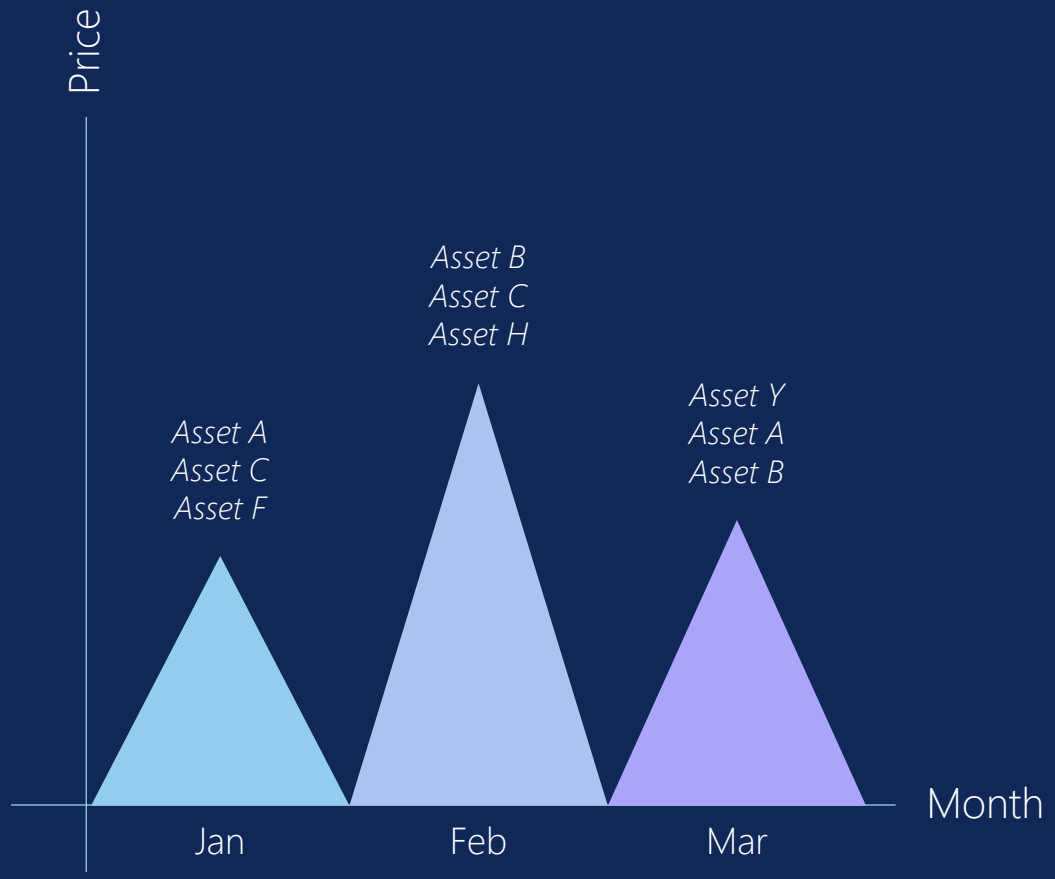
PERSONA A

PERSONA B

PERSONA C

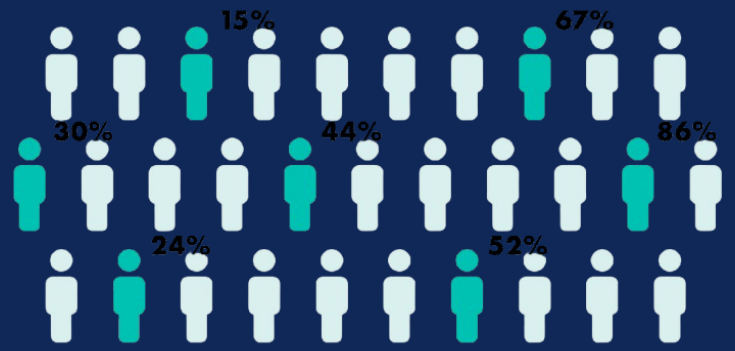
ASSIGN RECOMMENDATION ASSET TO EACH PERSONA MONTHLY

Monthly recommendation with "Customer's persona"

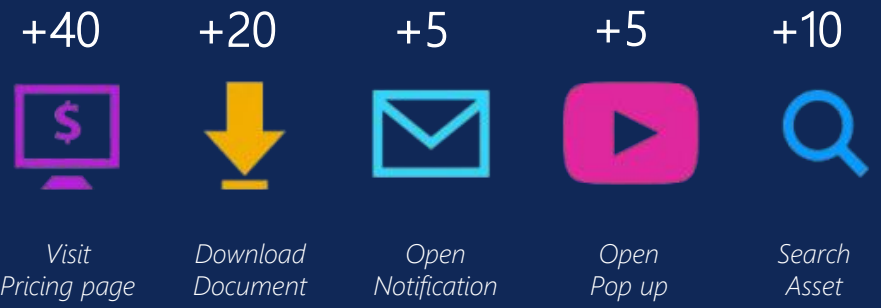


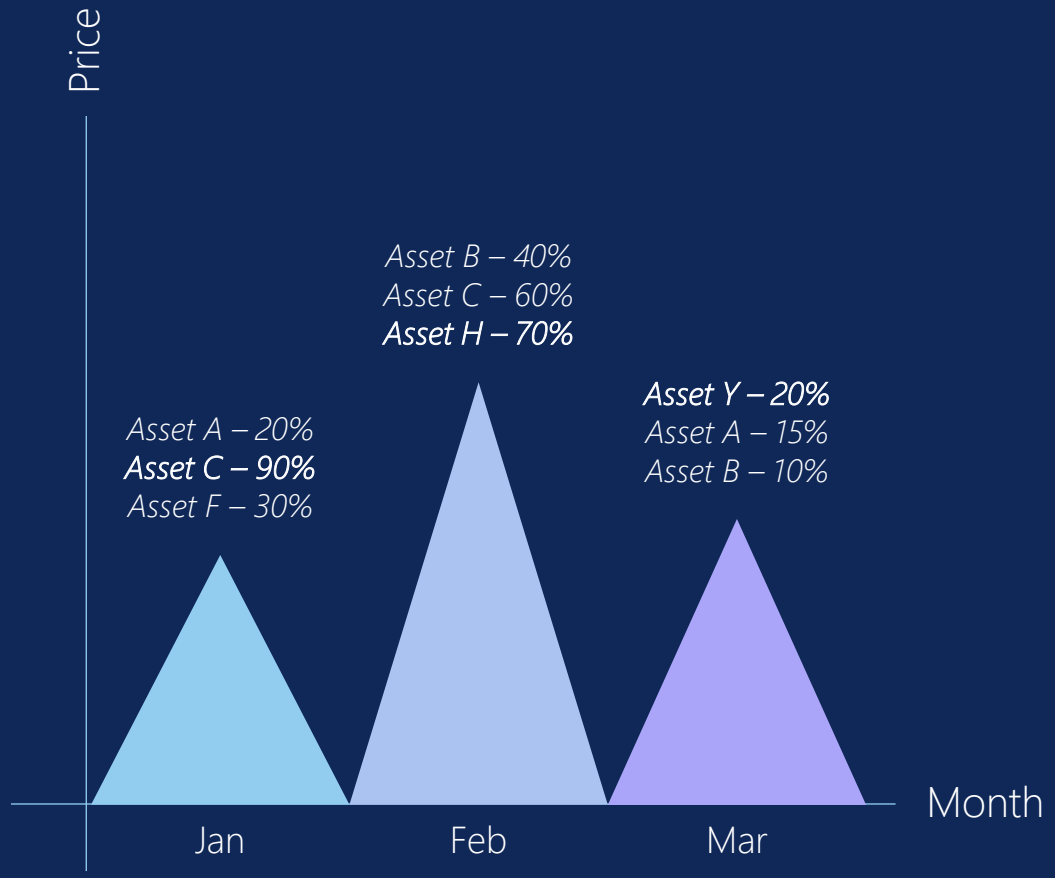
KNOW PURCHASE LIKELIHOOD BEFORE MESSAGING TO THEM

Propensity-to-buy



Funnel-to-buy

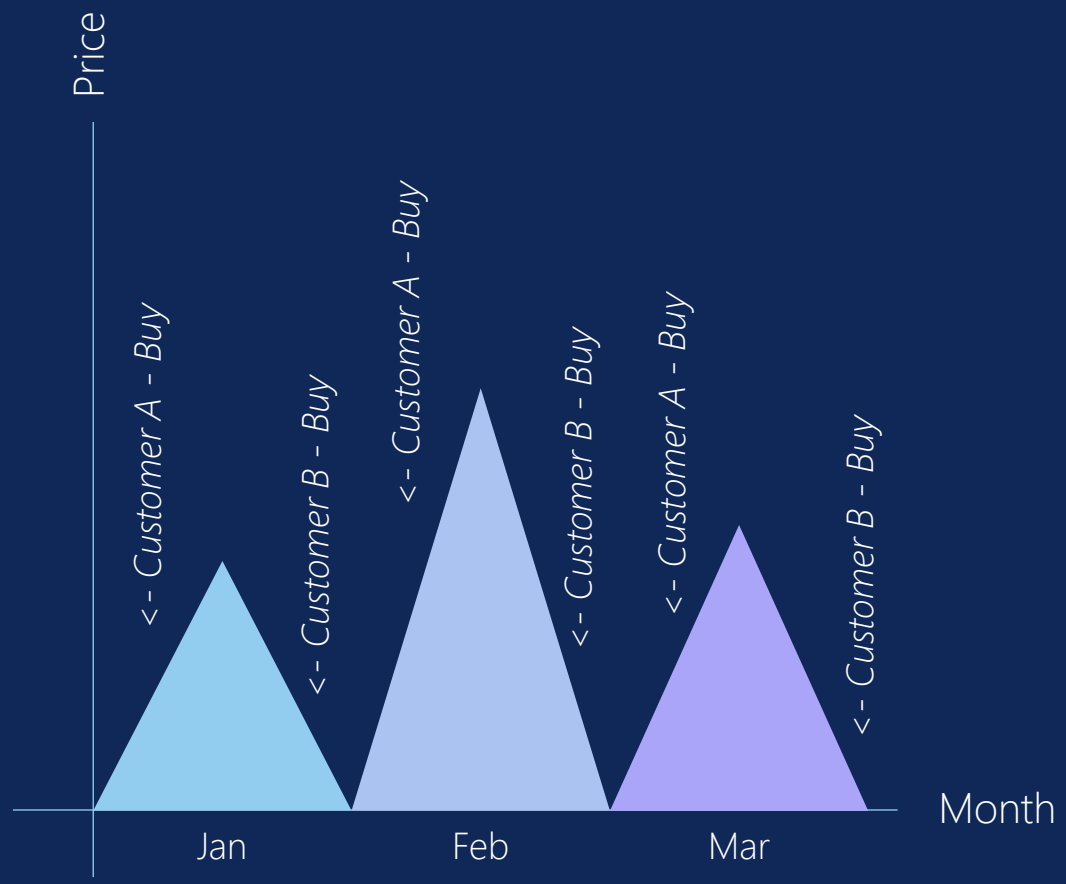




MAKE THEM BUY

USE PRECISE MESSAGE TO DRIVE MORE CONVERSIONS

FOMO/JOMO prediction



User A experiences FOMO (Fear of Missing Out)

- We should send a message like:
- "Prices are going up! Buy now to avoid missing out!"

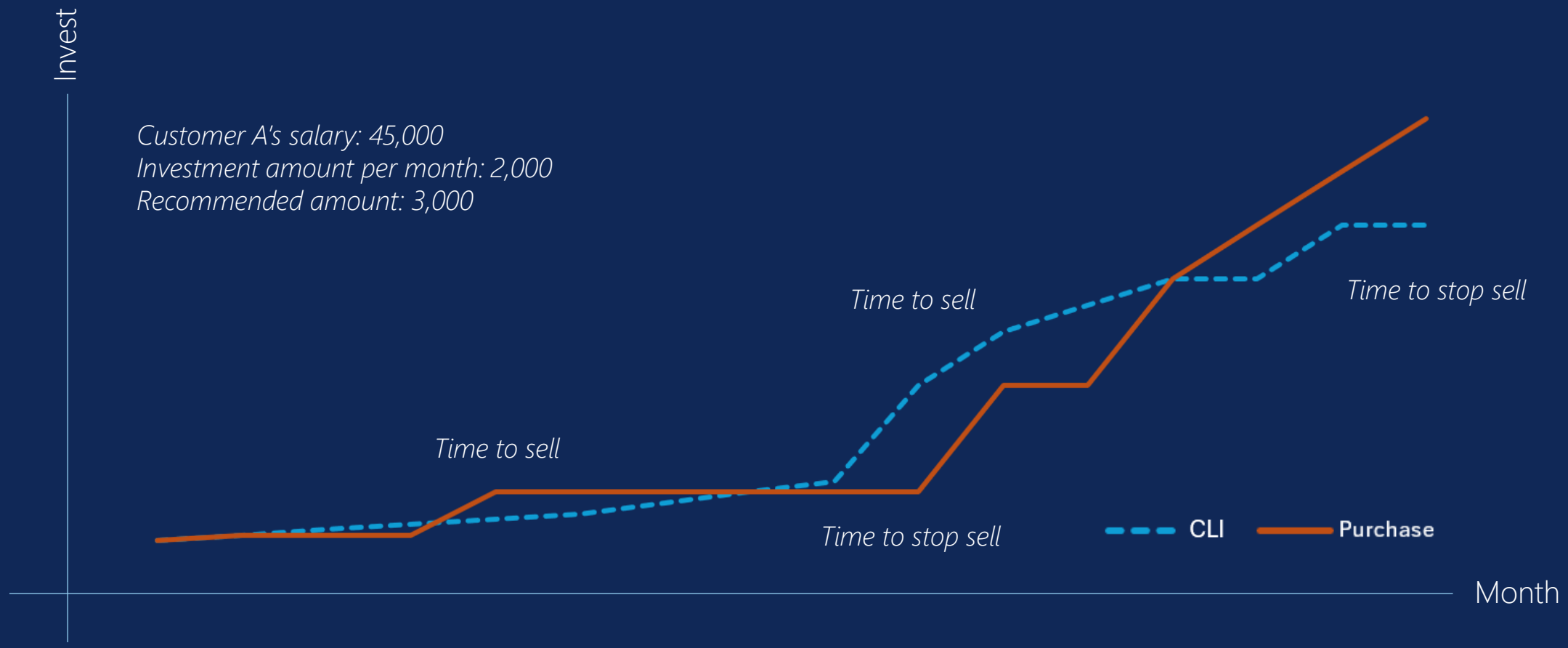
User B experiences JOMO (Joy of Missing Out)

- We should send a message like:
- "Price just dropped! Now's the perfect time to get it!"

MAKE THEM BUY

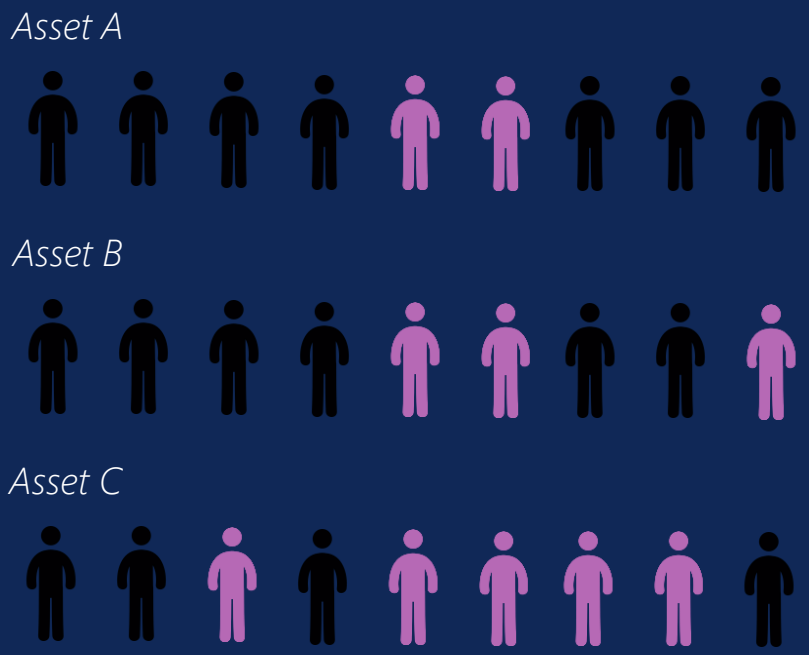
AVOID OVERSELLING ONCE A CUSTOMER REACHES THEIR PURCHASE LIMIT

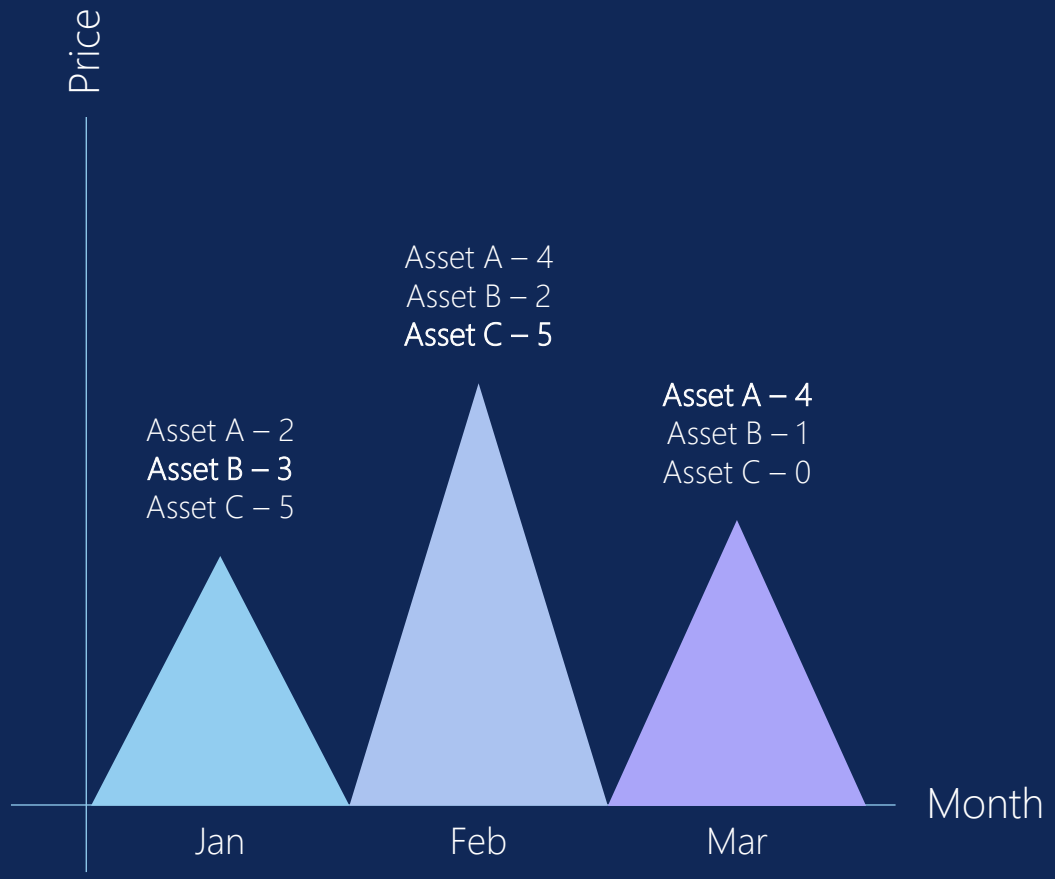
Salary prediction & Customer's lifetime investment (CLI)



PREDICT REDEMPTION SIGNALS FOR TIMELY ADVISORY

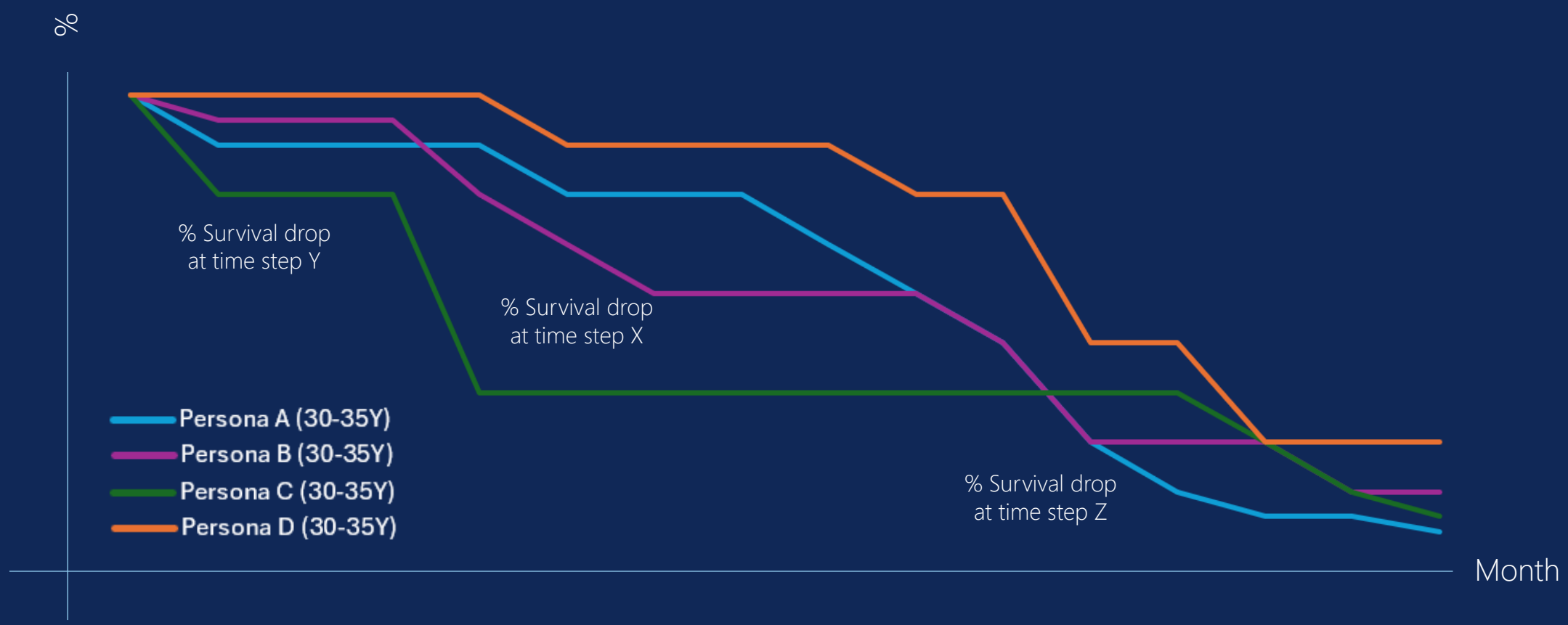
Redemption signal



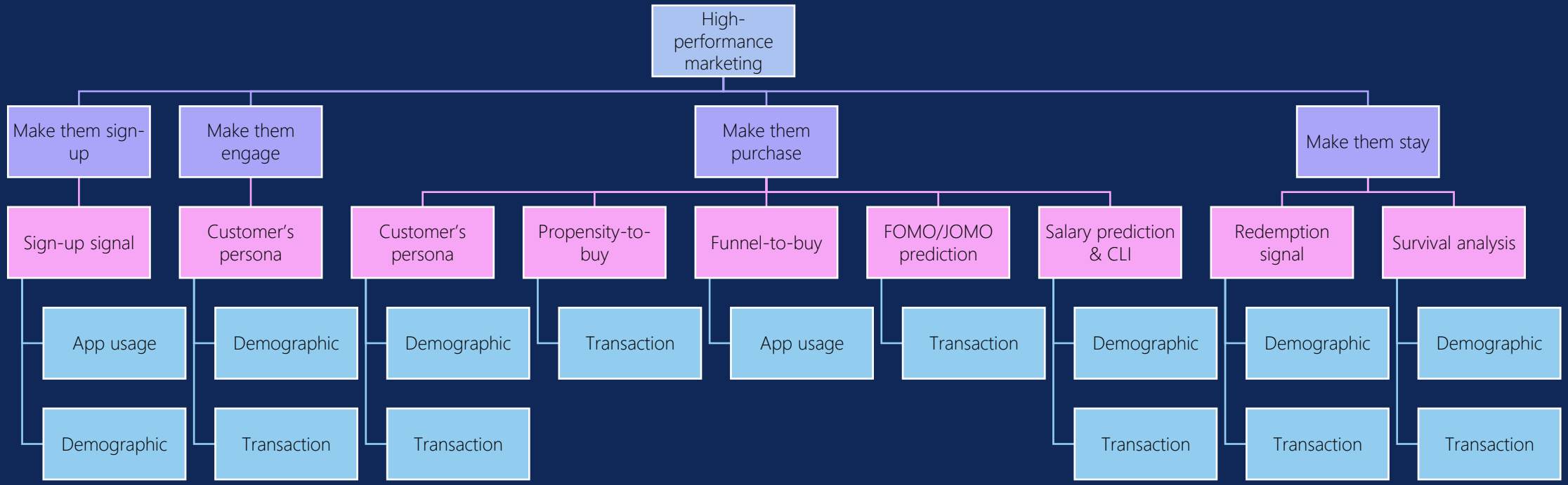


KNOW INVESTMENT ENDING PERIOD AND PROVIDE ADVISORY GUIDANCE

Survival analysis



MAKE THEM STAY

APPENDIX: REQUIRED DATA EACH STEP

4 "M" framework, model and required data