Name of Proponents

Hustler: Marc Goco
Hipster: Bryce Mendez
Hacker: Hansong Malalay
Writer: Joshua Mercado

Start-up Name – Start up Title

RoboAdvisor – AI-powered financial advisor for portfolio management and smart recommendations.

MARKET VALIDATION QUESTIONNAIRE

We, the 4-year Bachelor of Science in Information Technology students at the University of Cebu – Banilad Campus, are currently conducting a capstone project entitled: "RoboAdvisor: An Intelligent Stock Analysis and Portfolio Management System."

The application we are proposing, RoboAdvisor, aims to make investing in financial markets accessible to a broad range of people by providing an easy-to-use platform where users can interact with a chatbot agent to automate investment analysis and portfolio management. Through this platform, investors receive personalized recommendations and actionable solutions tailored to their preferences, helping them make informed decisions effortlessly.

Our goal is to lower the barriers for non-professional investors by offering financial services at a reduced cost, empowering users to achieve their investment goals with relevant, easy-to-understand advice. RoboAdvisor combines artificial intelligence with financial services to deliver deep personalization and adaptive recommendations, bridging the knowledge gap for beginners and enhancing their investment experience.

This project is a critical requirement for our graduation and involves extensive research beyond our academic setting. As part of our research and development, we kindly request your consent to participate in a survey that will provide valuable insights and data essential to our study. All information gathered will be treated with strict confidentiality and used solely for academic purposes.

We appreciate your consideration and support in helping us realize this academic endeavor. Thank you and more power!

Data Privacy Consent:

I agree that my information will be kept highly confidential and used for academic purposes only. The researchers will take full responsibility for any information I disclose.

☐ Agree
☐ Disagree

Part I: Discovering Stocks and Investments

1. **How do you usually look for stocks or investment opportunities?**
   - ☐ Using financial news websites or search engines (Google, Bing, etc.)
   - ☐ Browsing stock market or investment apps/platforms
   - ☐ Social media groups or online investment communities
   - ☐ Asking financial advisors or brokers
   - ☐ Other (please specify): _____
2. **Can you describe your financial goals related to your saving habits and how you plan to achieve them?**

   _____

   _____

   _____

3. **How often do you want to buy a stock but don't because of price, lack of info, or other obstacles?**
   - ☐ Never
   - ☐ Sometimes
   - ☐ Often
4. **How easy or difficult is it for you to find investments that align with your financial goals? Please explain.**
   - ☐ Very easy
   - ☐ Somewhat easy
   - ☐ Somewhat difficult
   - ☐ Very difficult
5. **Have you missed investment opportunities because they weren't suggested or visible to you during your search?**
   - ☐ Yes
   - ☐ No
6. **How helpful would it be to get personalized stock or portfolio recommendations that match your goals and risk comfort, saving you time and effort?**
   - ☐ Not helpful
   - ☐ Somewhat helpful
   - ☐ Helpful
   - ☐ Very helpful
7. **Do you find it hard to explain your investment goals or preferences when looking for advice or using financial tools?**
   - ☐ No
   - ☐ Yes
8. **How likely are you to use AI-powered personalized recommendations to help find stocks or portfolios tailored for you, if available in an investment app?**
   - ☐ Very unlikely
   - ☐ Unlikely
   - ☐ Neutral

☐ Likely
☐ Very likely

Part II: Communication and Investment Interaction

1. **How do you prefer to receive investment advice and portfolio management support?**
   ☐ Chatbot/AI agent within an app
   ☐ Financial advisor via phone calls or texts
   ☐ Email communications
   ☐ Social media messaging or forums
   ☐ Video or chat consultations within investment apps
   ☐ Other (please specify): _____
2. **How important is having personalized, AI-driven investment recommendations based on your preferences?**
   ☐ Not important
   ☐ Slightly important
   ☐ Neutral
   ☐ Important
   ☐ Very important
3. **How comfortable are you using automated chatbot agents for investment analysis and portfolio management?**
   ☐ Not comfortable at all
   ☐ Slightly uncomfortable
   ☐ Neutral
   ☐ Comfortable
   ☐ Very comfortable
4. **How satisfied are you with the ease of access and affordability of current financial services you use?**
   ☐ Very dissatisfied
   ☐ Somewhat dissatisfied
   ☐ Neutral
   ☐ Somewhat satisfied
   ☐ Very satisfied
5. **How often would you use an app that provides real-time, AI-powered investment recommendations tailored to your goals and risk preferences?**
   ☐ Never
   ☐ Rarely
   ☐ Sometimes
   ☐ Often
   ☐ Always
6. **Would you find it helpful if you could communicate directly with a chatbot to get quick answers about your investments anytime?**

☐ No
☐ Yes

7. **How likely are you to trust investment decisions or portfolio adjustments suggested by an AI-powered chatbot?**
   ☐ Not likely at all
   ☐ Somewhat unlikely
   ☐ Neutral
   ☐ Somewhat likely
   ☐ Very likely

8. **How valuable would it be to have access to low-cost, automated portfolio management to reduce fees compared to traditional services?**
   ☐ Not valuable
   ☐ Slightly valuable
   ☐ Neutral
   ☐ Valuable
   ☐ Very valuable

9. **Would you prefer an app that integrates virtual consultations with financial experts alongside AI-driven automated advice?**
   ☐ No
   ☐ Yes

10. **How often do you want your investment portfolio recommendations to be updated based on market conditions and your preferences?**
    ☐ Never
    ☐ Rarely
    ☐ Sometimes
    ☐ Often
    ☐ Always

11. **How likely are you to use an investment app that adapts to your feedback and investment behavior over time using AI?**
    ☐ Not likely at all
    ☐ Somewhat unlikely
    ☐ Neutral
    ☐ Somewhat likely
    ☐ Very likely

Client's Survey Questionnaire

1. **What is your main goal for investing?**
   ☐ Grow my money over time
   ☐ Generate regular income (e.g., dividends)
   ☐ Save for a specific goal (e.g., buying a house, education)
   ☐ Preserve my savings with low risk
   ☐ Other (please specify): _____

2. **How long do you plan to keep your investments?**
   ☐ Less than 1 year
   ☐ 1 to 3 years
   ☐ 3 to 5 years
   ☐ More than 5 years

3. **How much risk are you willing to take with your investments?**
   ☐ Low risk (safe, but smaller returns)
   ☐ Moderate risk (some ups and downs)
   ☐ High risk (willing to accept big ups and downs for bigger returns)

4. **How much experience do you have with investing?**
   ☐ None
   ☐ A little (have invested before)
   ☐ Moderate (regularly invest)
   ☐ Experienced (invest professionally or frequently)

5. **What type of investments are you interested in? (Select all that apply)**
   ☐ Stocks
   ☐ Bonds
   ☐ Mutual funds or ETFs
   ☐ Real estate
   ☐ Cryptocurrencies
   ☐ Other (please specify): _____

6. **What is your typical investment budget or range when starting or managing your portfolio?**
   ☐ Less than ₱500
   ☐ ₱500 – ₱1,000
   ☐ ₱1,000 – ₱5,000
   ☐ ₱5,000 – ₱10,000
   ☐ More than ₱10,000

7. **What is your typical investment budget or range when starting or managing your portfolio?**
   ☐ Less than ₱500
   ☐ ₱500 – ₱1,000
   ☐ ₱1,000 – ₱5,000
   ☐ ₱5,000 – ₱10,000
   ☐ More than ₱10,000

I certify to the best of my knowledge that the idea submitted is original.

_____Marc Louise Goco_____

Signature over printed name of Project Manager

_____10/4/2025_____

Date Signed/Submitted