DISCRETIONARY INVESTOR

INVESTORS WHO JUDGE COMPANIES ON THE BASIS OF QUANTITATIVE AS WELL AS QUALITATIVE FACTORS
Contextual Analysis

Educated, Amateur, Motivated
CONTEXTUAL ANALYSIS

AFFILIATION
IRRESPECTIVE OF EXPERIENCE, A PERSONAL CONNECTION TO THE INDUSTRY OR COMPANY IS A CONSTANT
TASK ANALYSIS

HEARING PAST THE NOISE
JPMorgan in Talks to Settle Energy Manipulation Case for $500 Million

JPMorgan Chase is aiming to settle accusations by the Federal

BY BEN PROTESS AND JESSICA SILVER-GREENBERG

It is unclear whether FERC will pursue a separate action against Blythe Masters, a senior JPMorgan executive.
TASK ANALYSIS

OVER-COMPLICATION
I'M NOT PASSIVE-AGGRESSIVE

UNLIKE SOME PEOPLE I KNOW.
OUR BEST IDEAS

THE FINAL FOUR

- Sentiment Analysis
- Portfolio Viz
- Stock Discovery
- Knowledge
  - Definitions
  - Simplification
  - Personal Finance
MATT
Appleby

1. Bubbles
   - Size of bubble represents proportion of your portfolio holdings on proportional composition of individual stock prices.

2. Bars
   - STOX
   - DLA
   - TESLA
   - LAN
   - AAPL
   - GOOG
   - Share for more info

3. News Bubbles
   - TESLA
   - GOOG

4. News bubbles
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<th>Interest</th>
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<td><strong>Sentiment Analysis</strong></td>
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<tr>
<td><strong>Portfolio Viz</strong></td>
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WHAT IS YOUR FAVORITE COMPANY

APPLE

WHAT DO YOU DO IN YOUR FREE TIME?

GEOSPATIAL CHECK IN BACKGROUND

WHICH COMPANY NEARBY DO YOU FREQUENT

OTHER QUESTIONS

BOOM! STOX

MATT APPLEBY
WHAT IS YOUR FAVORITE COMPANY

APPLE

WHAT DO YOU DO IN YOUR FREE TIME?

WHICH COMPANY NEARLY DO YOU FREQUENT

REGIONAL CHECK IN BACKGROUND

BOOM! STOX

OTHER QUESTIONS

MATT APPLEBY