INVESTORSCOPE

Hi-Fi Prototype

Overview

INVESTORSCOPE *is an intuitive way for beginning investors to discover new investment opportunities.*

Heuristic Eval Results

Progress on Task Implementation

Tools Used

Plan for Completion

Demo

Heuristic Eval Results

[H2-4: Consistency and standards] The two sorting mechanisms are redundant/confusing. Maybe use the categories like filters.

[H2-4 Consistency and Standards] The difference between "Recommended" and "Best" is not clear.
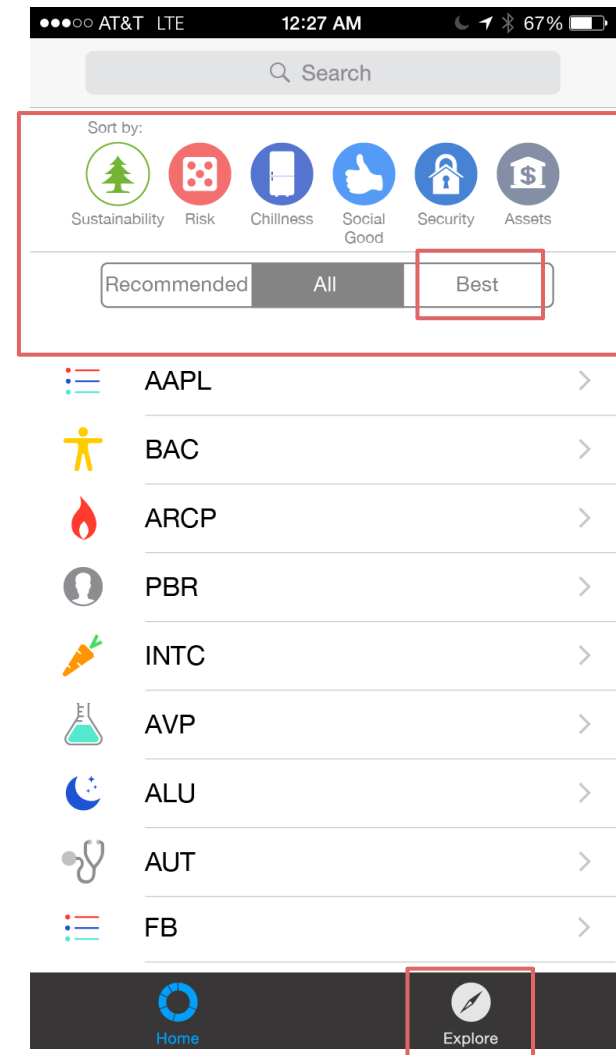
[H2-1 Visibility of system status] There is no connection between the "explore" button and the "Recommended" tabs. The "Explore" tab is used so that the "Recommended" tab works but there is no indication.

Solutions (Implemented):
1. Removed "Best" sorting

Solutions (Planned):
2. Potentially change name from "Explore" to "Find Recommendations"
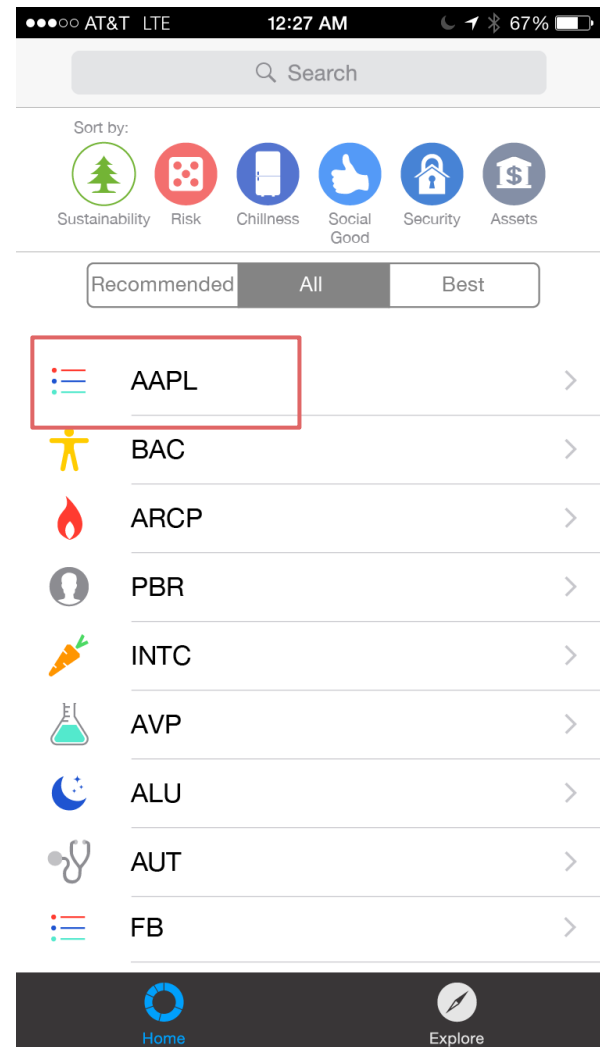3. Clarify sorting

Heuristic Eval Results

[H2-2 Match between system and real world] The number of foreign stock abbreviations disorients users in a way that may discourage discovery and the actionable task of clicking on the company.

Solutions (Not Implemented):

1. Display names and icons

Heuristic Eval Results

[H2-4: Consistency and standards] The UI experience while in the Explore stage seems to be different and unexpected when entering explore. The inconsistent UI flow makes it hard to see how exactly the explore module is tied to the rest of the application.
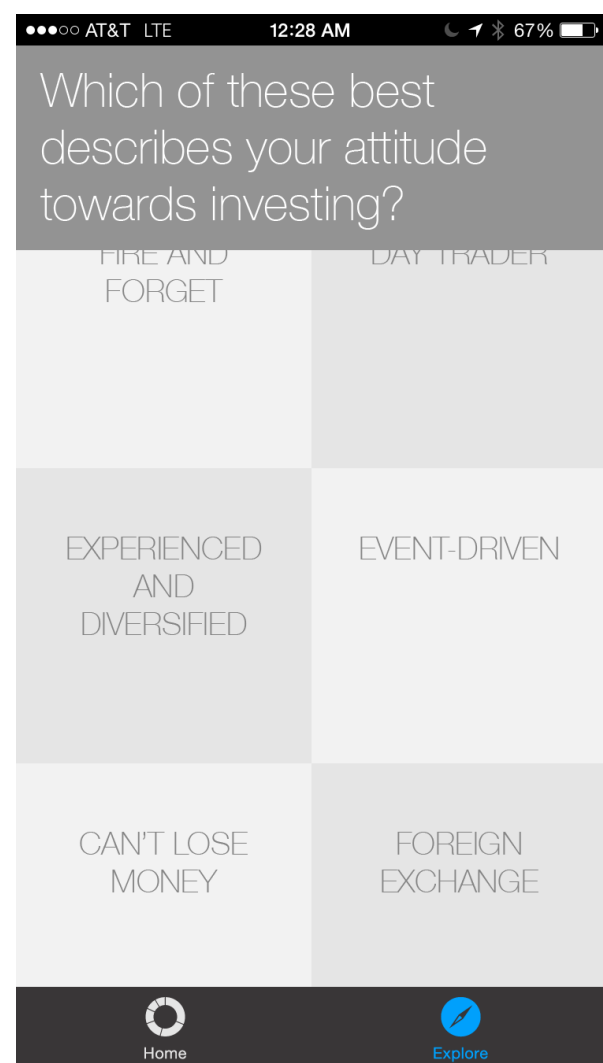
[H2-3 User control and freedom] Some answer responses in the explore module may not necessarily be the user's answers to that particular question. This is a slight violation of the freedom heuristic where the user should be given the option to freely answer in the manner that they wish.

Solutions (Implemented):

1. New question page currently in development

Solutions (Planned):

2. Change UI to work better with overall UI
3. OR, allow user to freely answer

IMPLEMENTED

Task #1: Search

A user wants to view relevant information for a specific company.

NOT IMPLEMENTED YET

Task #2: Stock Recommendation

A user answers a series of questions and receives automatically generated stock recommendations.

Task #3: Sorting

A user filters down a large list of potential investments to a small number of candidates, sorting by qualitative and financial metrics.

INVESTORSCOPE

Search for a company name or ticker.

AAPL	$116.59	VIEW ➡
ARCP	$8.99	VIEW ➡
BBRY	$10.13	VIEW ➡
CLDX	$20.65	VIEW ➡
CMCSA	$54.35	VIEW ➡
CSCO	$26.80	VIEW ➡
FB	$73.73	VIEW ➡
GERN	$3.24	VIEW ➡

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AAPL |

| AAPL | $116.59 | VIEW → |
| ARCP | $8.99 | VIEW → |

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AAPL

AAPL	$116.59	VIEW →
ARCP	$8.99	VIEW →
BBRY	$10.13	VIEW →
CLDX	$20.65	VIEW →
CMCSA	$54.35	VIEW →
CSCO	$26.80	VIEW →

INVESTORSCOPE

Apple Inc. (AAPL)

Price:	$116.59	+$2.14
P/E Ratio:	17.67	
Market Cap:	$677B	
Dividend Yield:	1.6%	

1 day	5 day	1 month	3 month	1 year	5 year	max

Tools

Github repo

Tools

Web-app running on heroku

Plan

1. Build Task 2 (Recommendations)
- Hard Code OR Wizard of Oz the recommendations
- Add more questions

2. Build Task 3 (Sorting)
- clarify sorting options
- make sorting metrics for stocks

3. Build more "filled in" Stock Page

and now for an underwhelming

Demo