

CONTEXTUAL INQUIRY, TASK ANALYSIS & ROUGH SKETCHES

DAVID MCLAREN, MATTHEW APPLEBY, DAVID KHAVARI, AND AARON SEKHRI

2800 COMPANIES
\$18 TRILLION



DISCRETIONARY INVESTOR

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

BRIDGE EIMON / JOHN HOCHSTATTER / JASON VAN DER MERWE

MASTER/APPRENTICE



CONTEXTUAL ANALYSIS

EDUCATED,
AMATEUR,
MOTIVATED



CONTEXTUAL ANALYSIS

AFFILIATION



INSIGHT (!)



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


TASK ANALYSIS


HEARING PAST THE NOISE




THE BEST INFORMATION?

Support Weakens for Dell Founder's Offer  

In Toure Trial, S.E.C. Battles Its Own Witness  8

Eisinger: Moves to Progress in Bank Regulation  4

Bank of America's Profit Up 63%, to \$4 Billion  45

DealB%k

WITH FOUNDER ANDREW ROSS SORKIN

The New York Times

MERGERS & ACQUISITIONS | INVESTMENT BANKING | PRIVATE EQUITY | HEDGE FUNDS | I.P.O./OFFERINGS | VENTURE CAPITAL | LEGAL/REGULATORY

INVESTMENT BANKING | LEGAL/REGULATORY | JUL 17, 3:44 PM | 161

JPMorgan in Talks to Settle Energy Manipulation Case for \$500 Million

BY BEN PROTESS AND JESSICA SILVER-GREENBERG

JPMorgan Chase is aiming to settle accusations by the Federal



Manuel Balce Ceneta/Associated Press

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

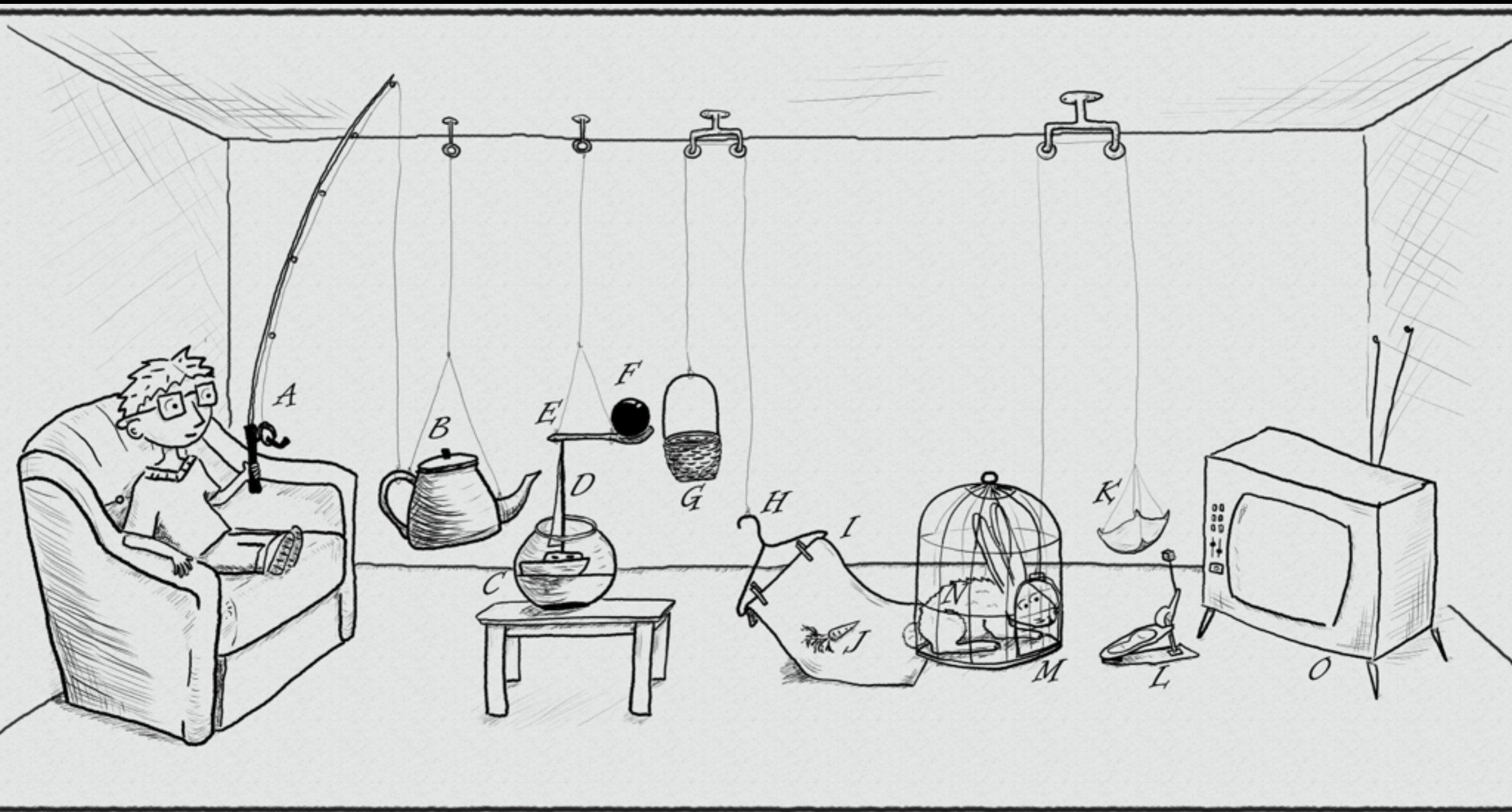
- ### The Wire
- JUL 18, 2:30 AM Herms Sales Pick Up
WSJ.COM
 - JUL 18, 1:46 AM An Open Letter to the Media
NAKED CAPITALISM #Snowden and Latin America
 - JUL 18, 1:31 AM SAP Profit Up 10 Percent in Second
AP Quarter
 - JUL 18, 1:04 AM India toughens up on insider trading
FT
 - JUL 18, 12:21 AM Guardian Journalist to Write Book on
NYTIMES Surveillance

Morning Agenda With William Alden

Bank of America Profit Surges

TASK ANALYSIS

OVER-COMPLICATION



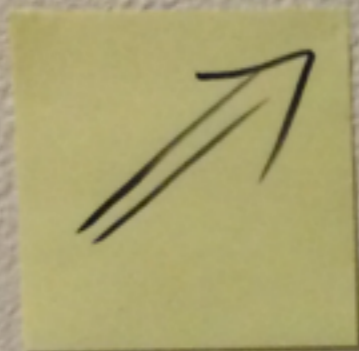
PASSIVE INVESTORS



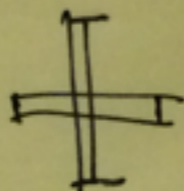
mimiandeunice.com



Stock
Discovery



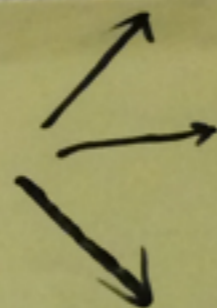
Mannual



Random

Categories
(Tiers)

Recommended



New stocks

Sorting by
other factors

Social

Same field
competitors

Illuminating
Relationships

OUR BEST IDEAS

THE FINAL FOUR

SENTIMENT
ANALYSIS

PORTFOLIO
VIZ

STOCK
DISCOVERY

KNOWLEDGE
- DEFINITIONS
- SIMPLIFICATION
- PERSONAL FINANCE

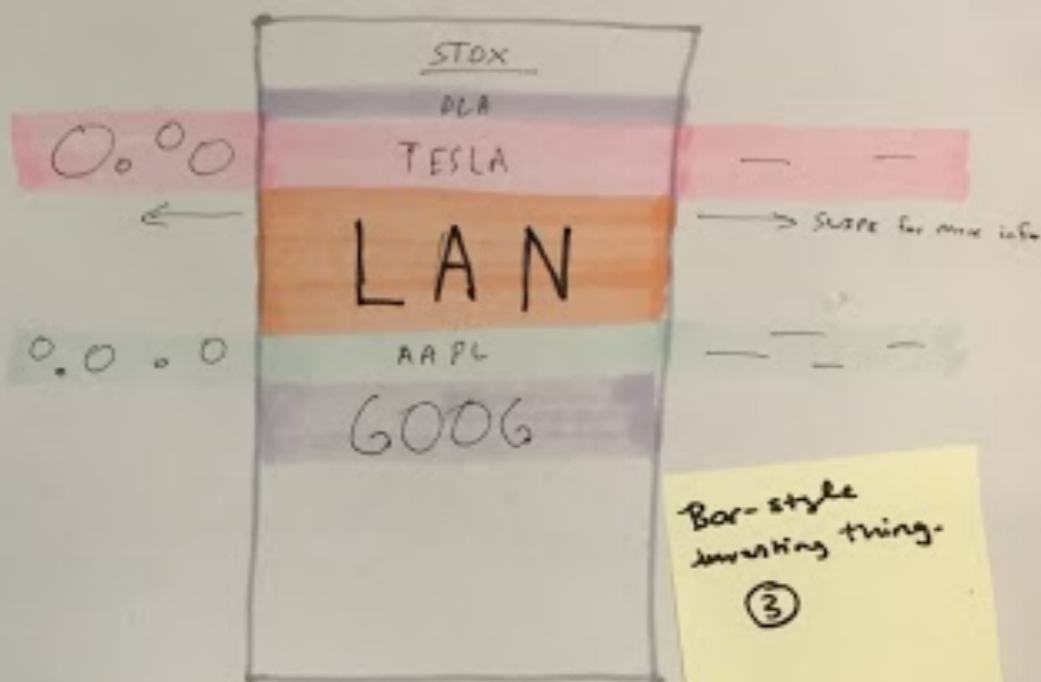
MATT
APPLEBY

① Bubbles

Size of bubble represents proportion of your personal holdings or proportional comparison of individual stock prices.

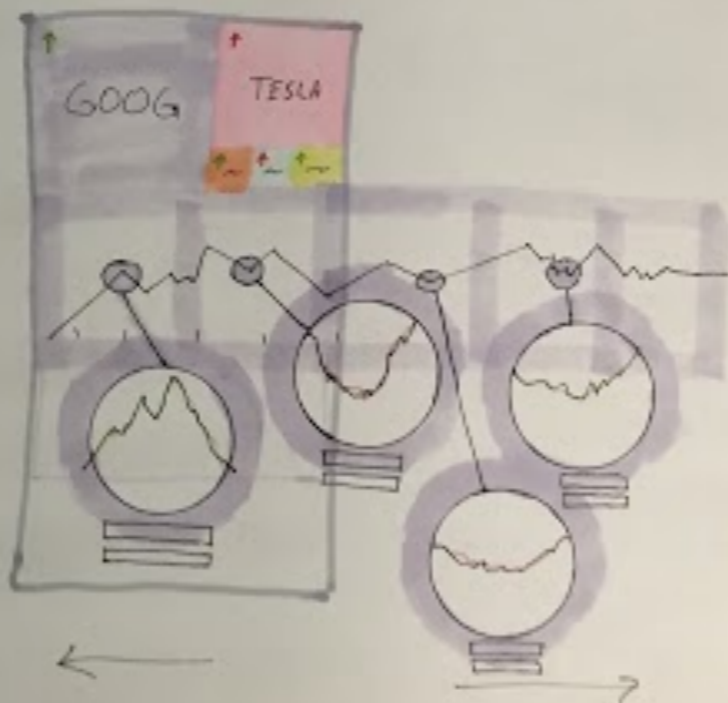


② Bars



Bar-style investing thing.
③

③ NEWS Bubbles

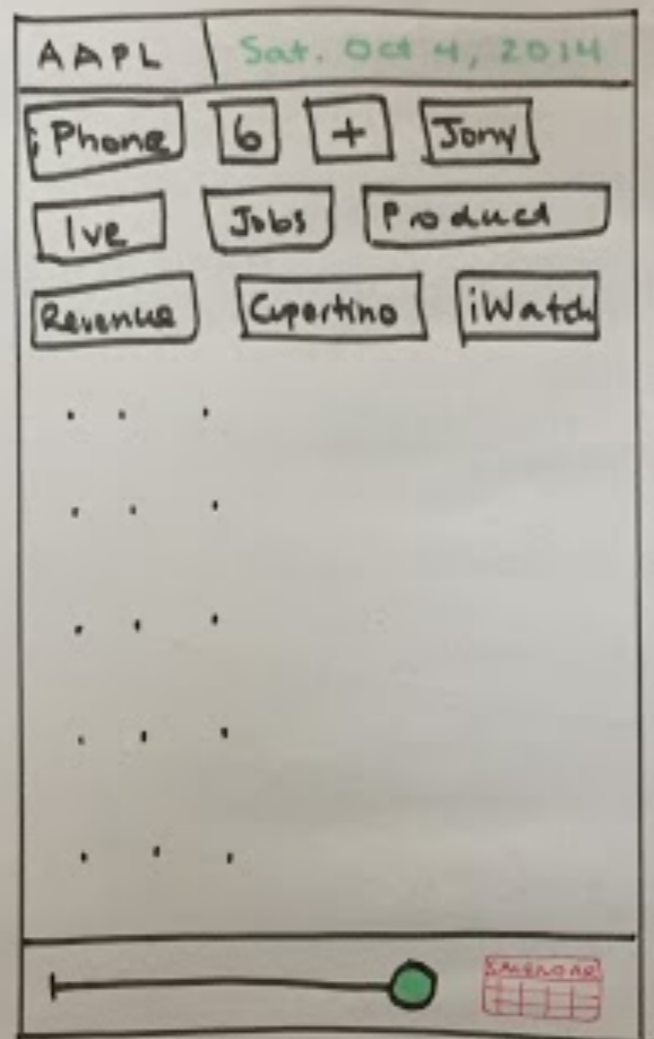


News bubbles

④

Word Storm
Ideas
By David Khavari

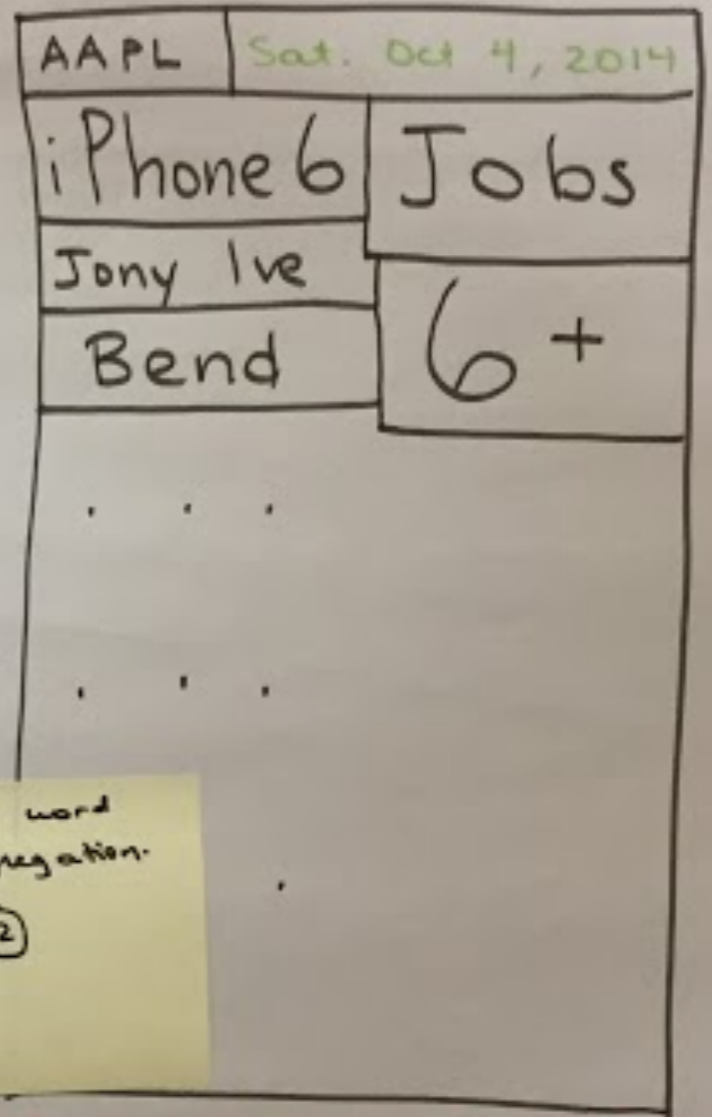
"Pure Word Aggregation"



Natural language aggregation relating to a company -
②

DAVID KHAVARI SKETCH #6

"Sized Word Aggregation"



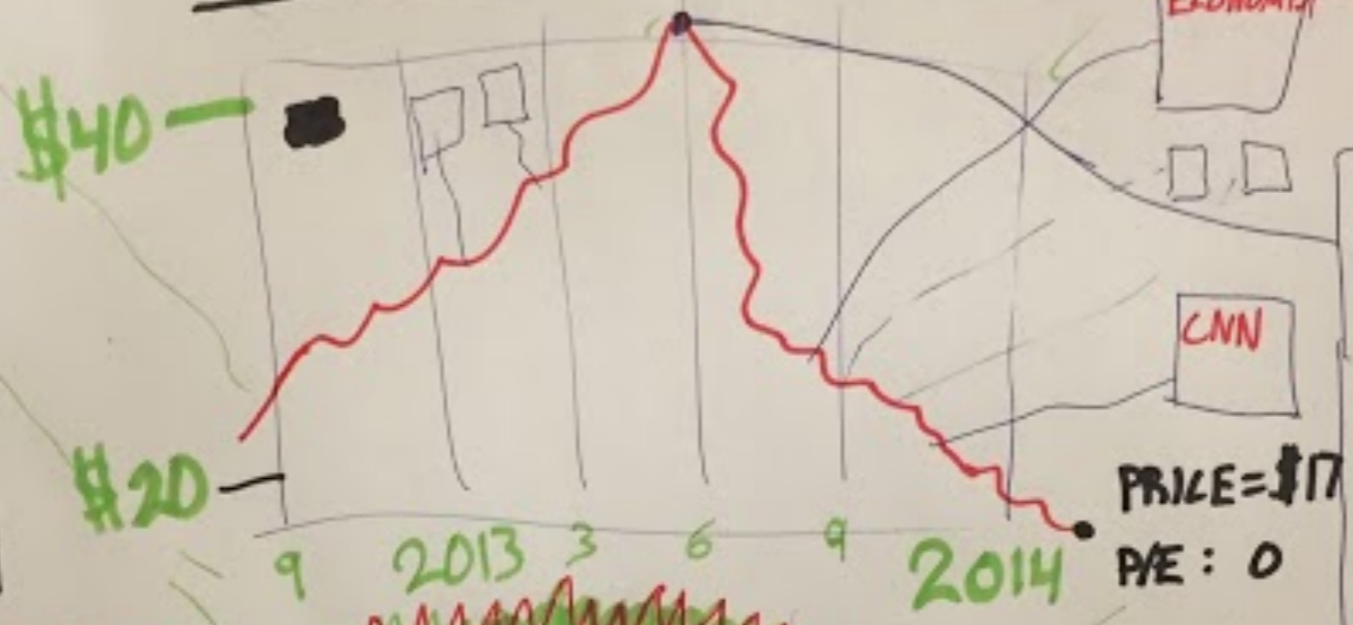
Sized word aggregation.
②

DAVID KHAVARI SKETCH #7

OCULUS BIFT

David McLaren
#7

PORTFOLIO	
STOCK	YTD
EA
NVDA
GOOG
AAPL



IMPOSTOR CEO

WSJ

.....
.....
.....
.....

SHAREHOLDER

FUNDAMENTALS	
PRICE
P/E
.....



"On a scale
of 1-4."



STOCK
DISCOVERY

SENTIMENT
ANALYSIS

KNOWLEDGE
- DEFINITIONS
- SIMPLIFICATION
- PERSONAL FINANCE

PORTFOLIO
VIZ

Interest

Feasibility

Significance

4

3

4

2

1

2

3

1

4

3

3

2

WHAT IS YOUR
FAVORITE
COMPANY

APPLE

AUTO
CORRECT

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

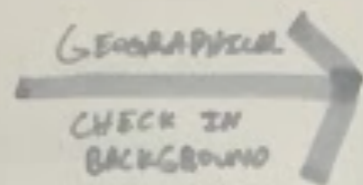
AUTO
CORRECT



WHAT DO
YOU DO IN
YOUR FREE
TIME?

Geolocation

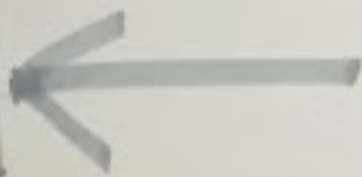
CHECK IN
BACKGROUND



WHICH COMPANY
NEARBY DO YOU
FREQUENT



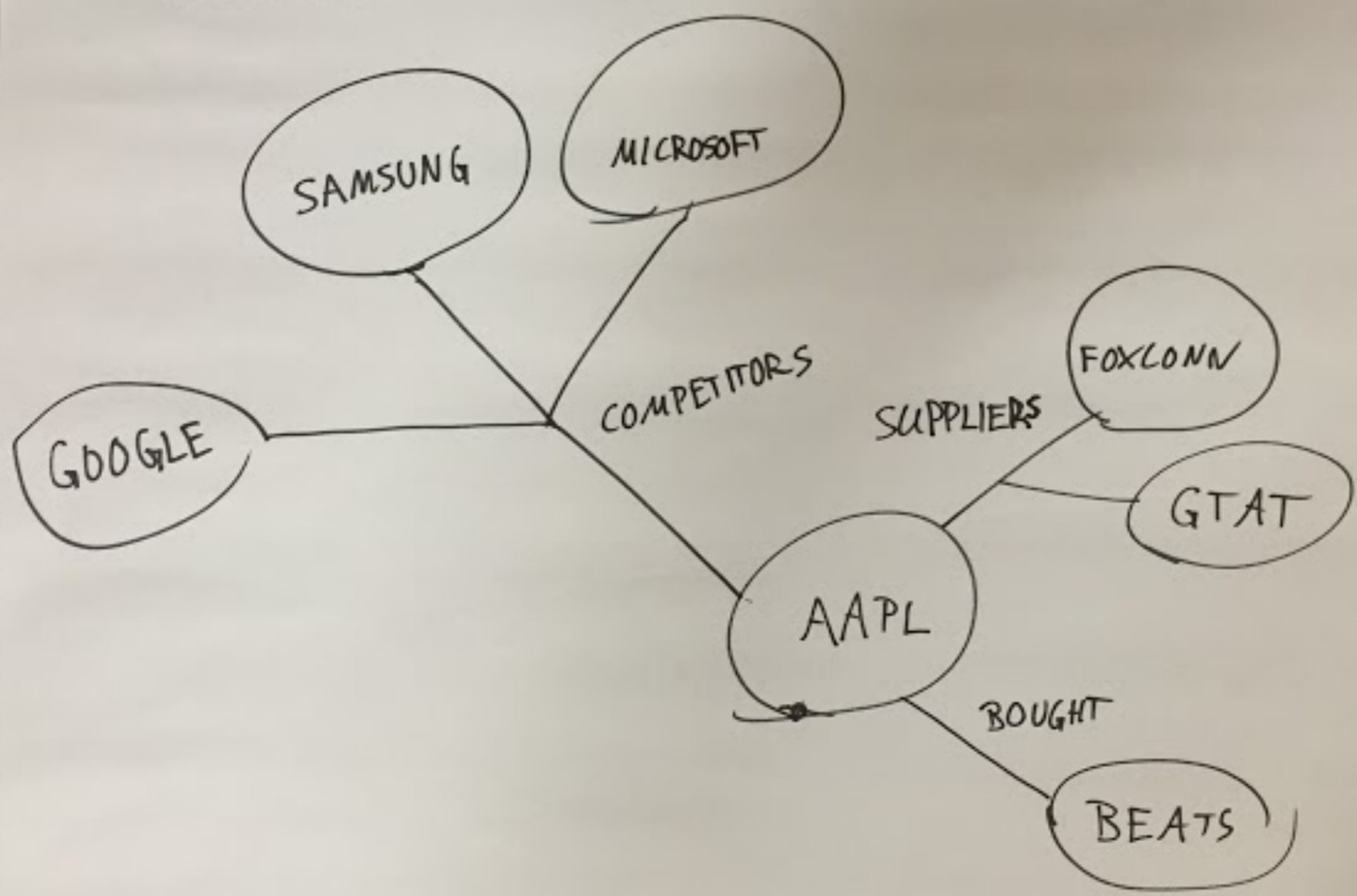
OTHER
QUESTIONS



**BOOM!
STOX**

MATT
APPLEBY

DISCOVERY



DAVID MCLAREN
#8