

InvestorScope

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*Modernizing discretionary investing through
a comprehensive and integrated interface.*

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Team

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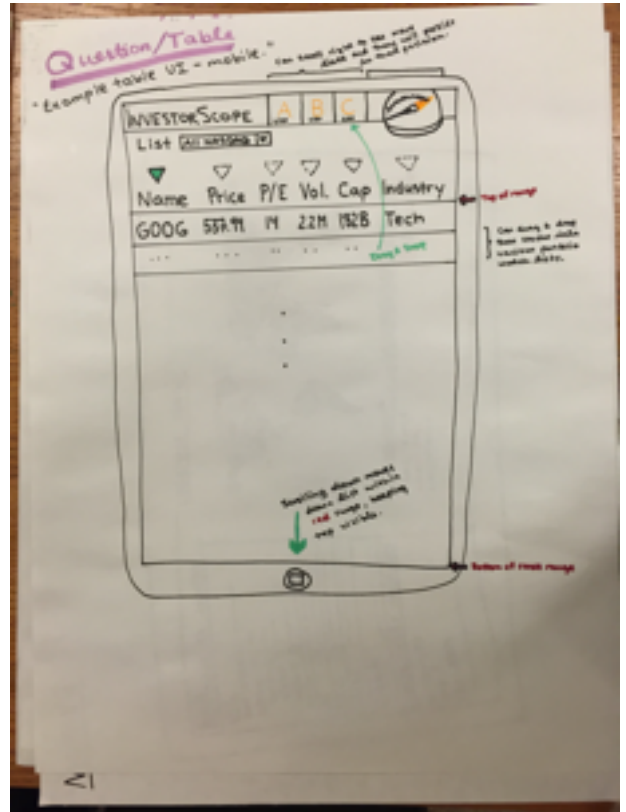
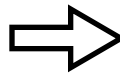
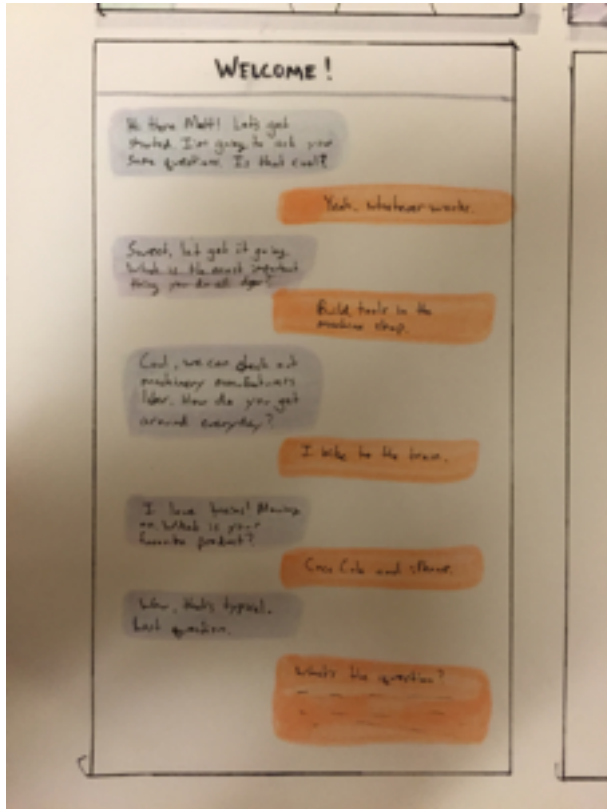
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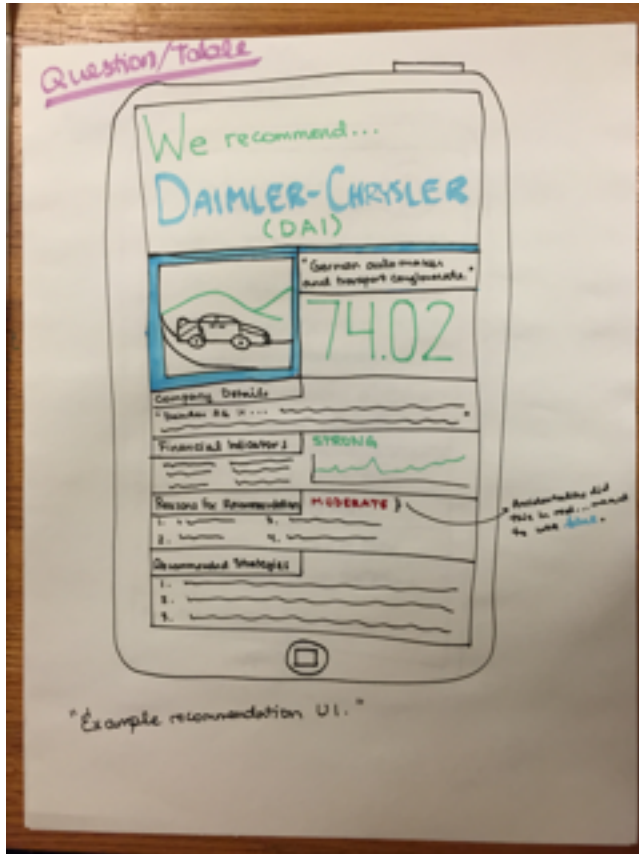
Problem and Solution Overview

Most individual investors practice discretionary trading, meaning they make investment decisions based upon both technical (prices, earnings etc.) and non-technical (news, market sentiment etc.) factors. Today, this information is spread across a number of old and disjointed websites. The resulting decisions are most often made with incomplete information, thus harming decision-making quality. We propose a new, aggregated interface for discretionary investing, where investors are able to discover new investment opportunities that they otherwise would have neglected. We believe this will solve the major problems in this area, by bringing relevant content to casual investors who want to learn more.

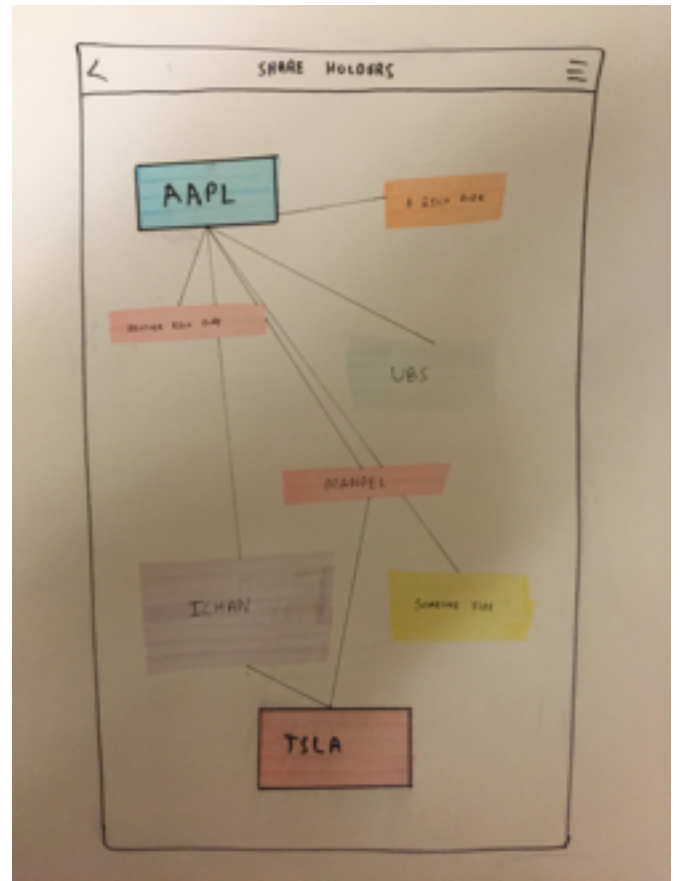
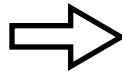
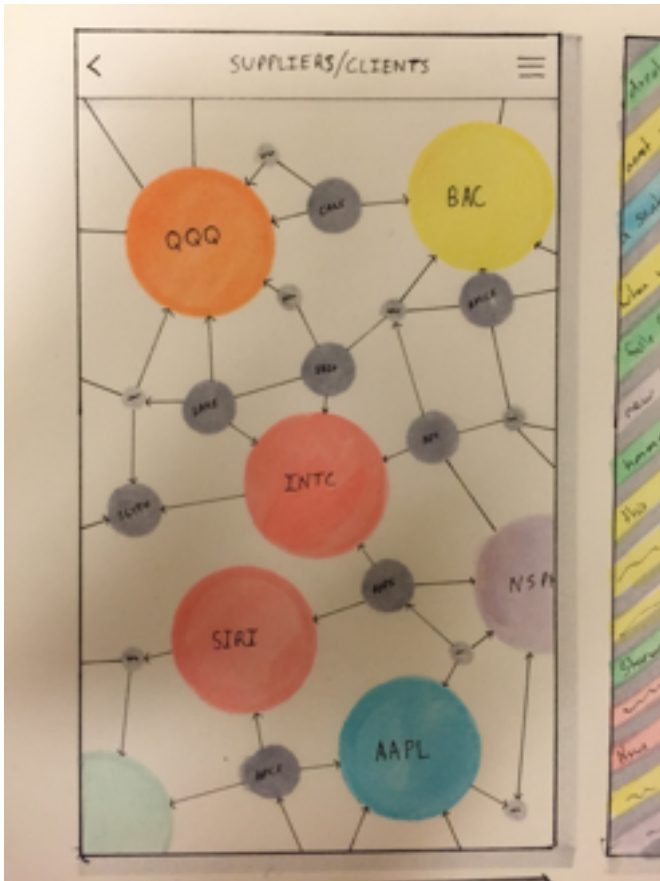
UI Sketches

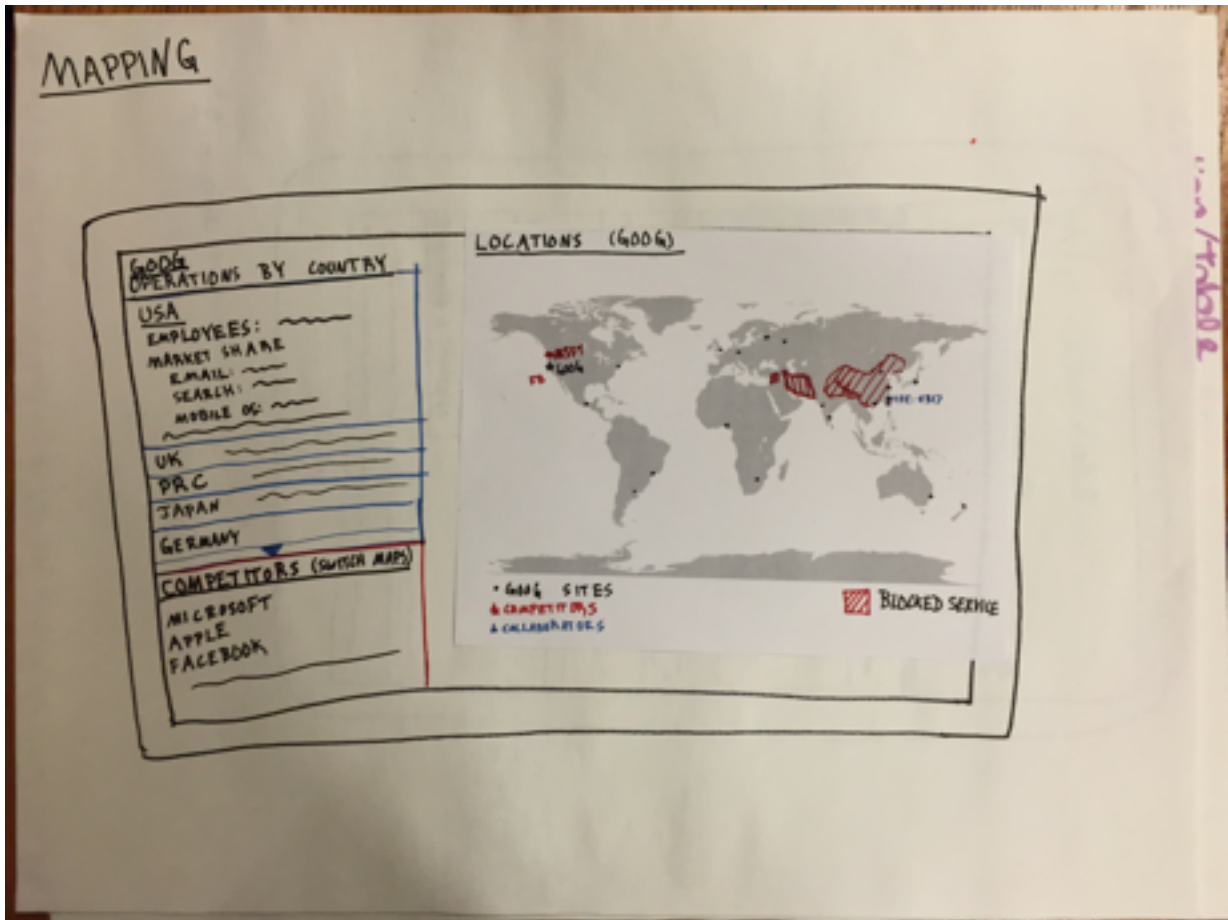
Our first concept is "Questions". Questions is a way for investors to source securities they would have otherwise not found, but that they would be naturally inclined towards given their preferences, risk profile, trading strategies and values. Customers input data that allows the application to build an understanding of the user, and then delivers personalized recommendations and the ability to sort information easily and intuitively.





Our second concept is "Graph". Graph is a way for investors to understand the relationships between particular customers and its many stakeholders. These could include suppliers, competitors, investors, related companies, etc. If a customer wants to bet against a company and for its competitors, or believes a supplier is going to thrive because of a glut in sales for the original company, he or she can use graph to find these relationships, and perhaps a host of unexpected connections in the process. The below sketches show how a user can navigate between different types of maps.





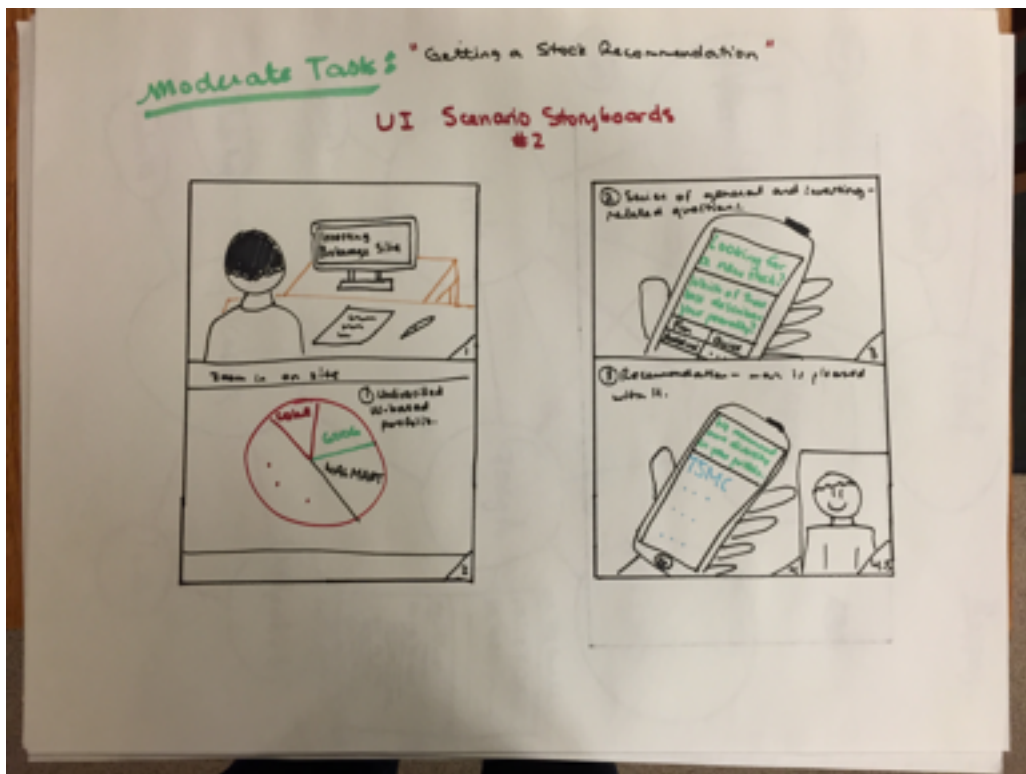
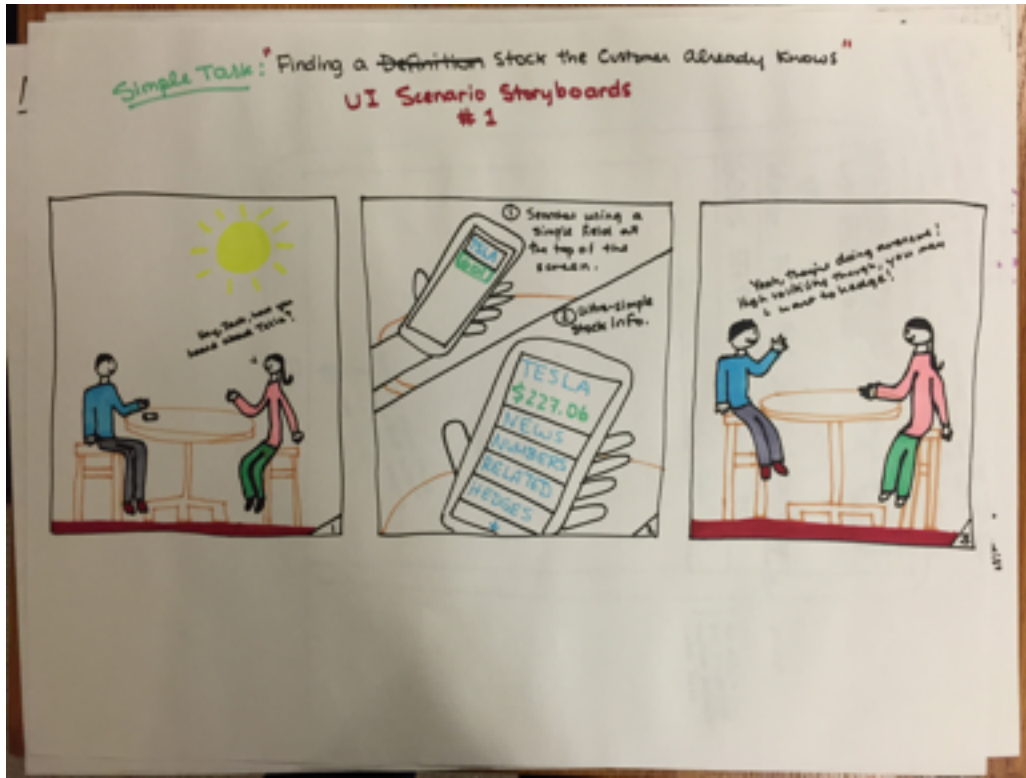
Design Selection

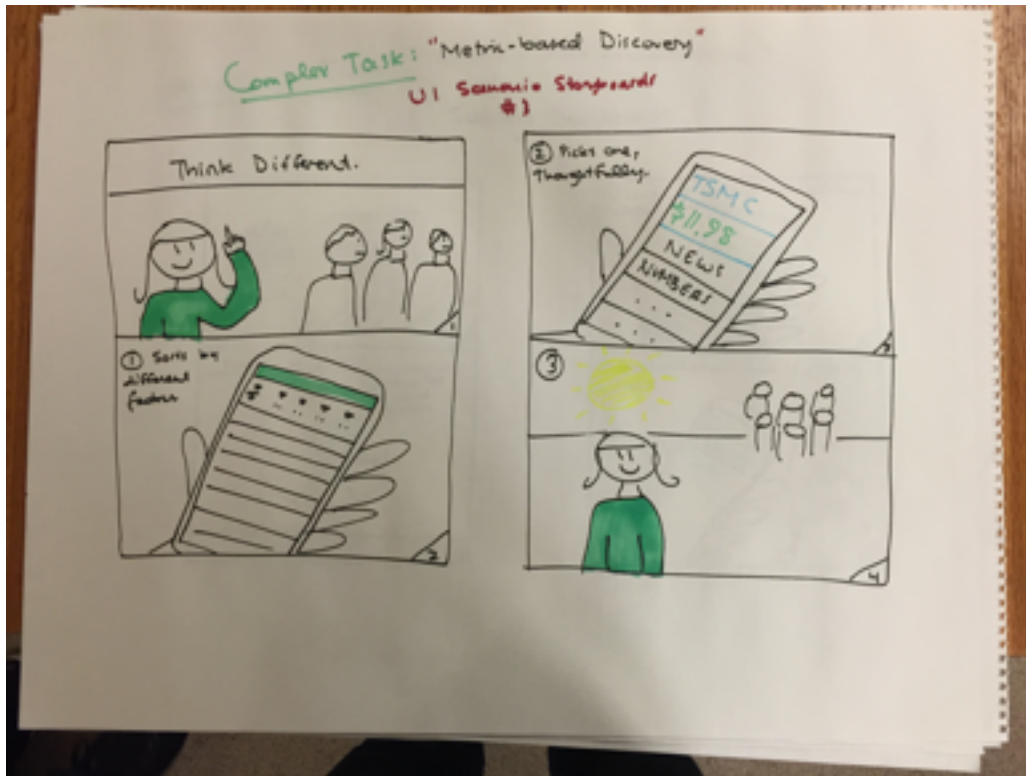
As a team, we decided that our first concept, "Questions" was preferred to "Graph". There were a variety of reasons for this. Firstly, in terms of functionality, we felt that Questions offered more. The application allows the customer to encounter and learn more about companies in a natural, almost conversational way. In stark contrast, Graph may illuminate, but it may confuse in equal measure, because the systems being graphed are inherently complex. Graph's interface is the most similar to one that most customers are most used to: text messaging.

Our customers would be predisposed to input their data because they have been primed through their use of any variety of messaging applications. Additionally, we believe that Questions can be much more easily implemented in a mobile setting than Graph, as the latter concept requires more space to adequately convey the number of stakeholders involved, as well as their relative relationships. Questions can much more easily be implemented in a mobile setting, and we want to reach our customers wherever they find themselves, and not solely at a desk. We also feel that Questions will allow us to build a more coherent, and actionable, picture of the customer, which means the application can deliver greater insight.

Functionality	Description
Mobile	The application is designed with a mobile user in mind, and takes advantage of behavior that a user is already primed towards undertaking
Recommendation	The application will actually offer recommendations on the basis of the customers' preferences, risk profile, trading strategies and values, which we will infer from the questions we ask them
Sorting	The application will allow you to sort through information intuitively and easily, on a variety of metrics that are not commonly used or considered
Processing	The most distinctive part of the application will be the fact that the user will be communicating with it naturally, as if it were another person
Gamification	The application will contain elements of gamification that will push the users to answer more questions, give us more valuable information, and act on recommendations

UI Storyboards





Video Planning Storyboards

Video Storyboard

Act I - End:

The user has just heard a hot stock tip. They end the call there and start investigating with InvestorScope.



Video Storyboard

Act II - Scene 1:

The user looks up the stock on InvestorScope with a search function. They are agghast at what they see.



Video Storyboard

Act II - Scene 2: The user is looking for new stock recommendations. The app shows a list after a series of questions.



Concept Video Description

In our concept video for InvestorScope, we wanted to express the difference between the trustworthiness we are hoping to express with our design versus the perceived risk of investing with a bank or broker. We decided to use clips from the Wolf of Wall Street to make the comparison very clear. We hoped that the cultural prevalence of the story of Jordan Belfort would add to the effect. It was difficult to see what kind of shot would work well in conjunction with the Wolf of Wall Street clips. We decided to use text messages as the main interface for our video. It was simple to prototype, relatively clear in its usage, and emphasized the point we wanted to make about conversational advice. However, we had difficulty expressing the rest of our ideas well. There is less of a visual story behind the rest of our interface, which made it hard to explore in our concept video. We were happy with the results of speeding up the typing clips and the music added to the comparison.

Designing the video took about an hour. Much of the design happened in person and then, throughout the day, we discussed via email other ideas for the video. By the end of the day we had decided on using the Wolf Of Wall Street clip. That night we spent about 30 minutes gathering props and setting up a set. Then about an hour and a half filming. Over the next two days, about 3 hours were spent editing with one draft sent out Thursday afternoon and the final version finished on Friday.