

*Courtesy - Google Images*

# Unifying Customer Experience for the financial community

Noorul Ameen | Jun 2017

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## UX DESIGN JOURNEY

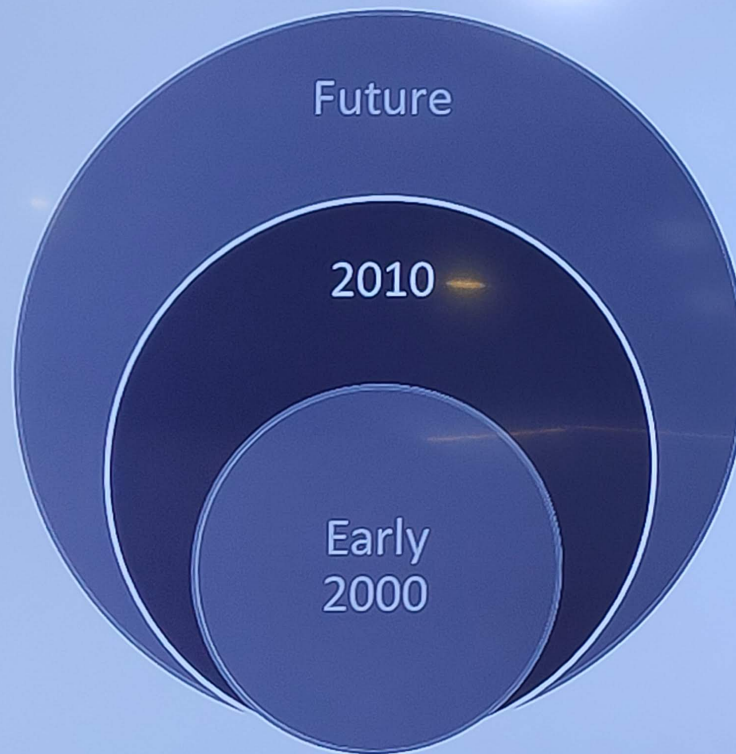


### NetExchange Pro/Advisor

- Ops personnel focused
- Account centric
- On-demand product use
- Need of the hour!



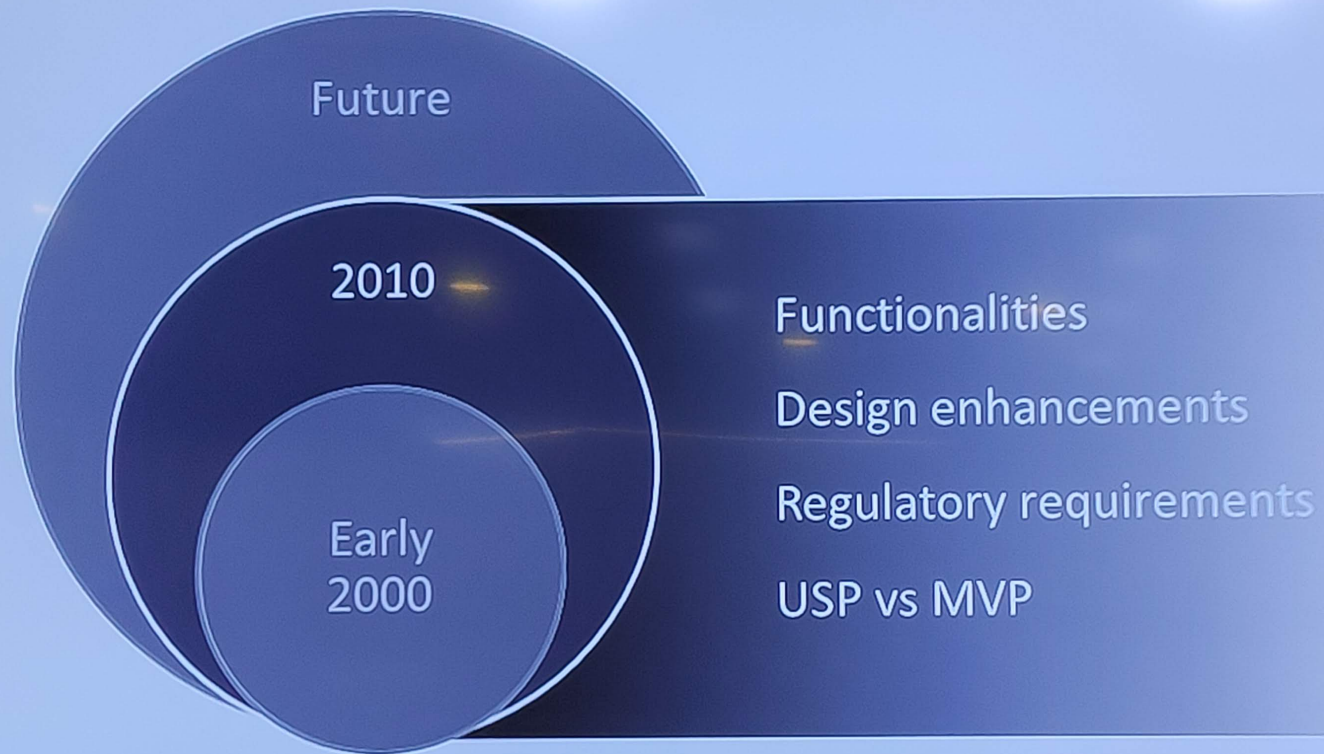
## UX DESIGN JOURNEY



### NetX360

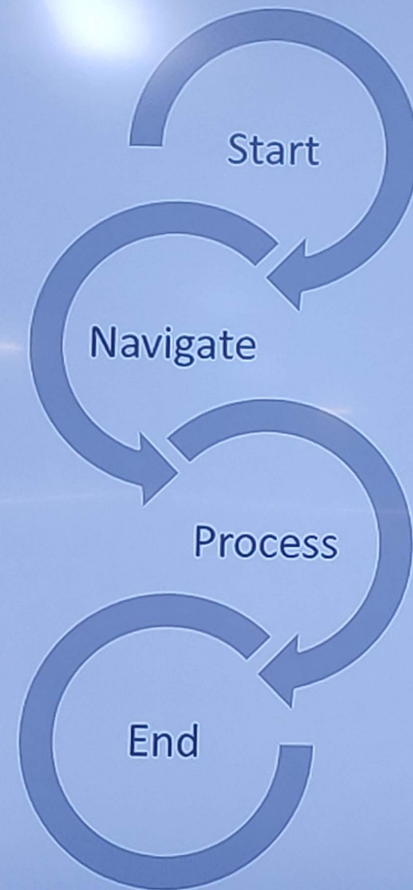
- Hybrid business model
- Client centric
- Seamless UX
- Guidance

## UX DESIGN JOURNEY

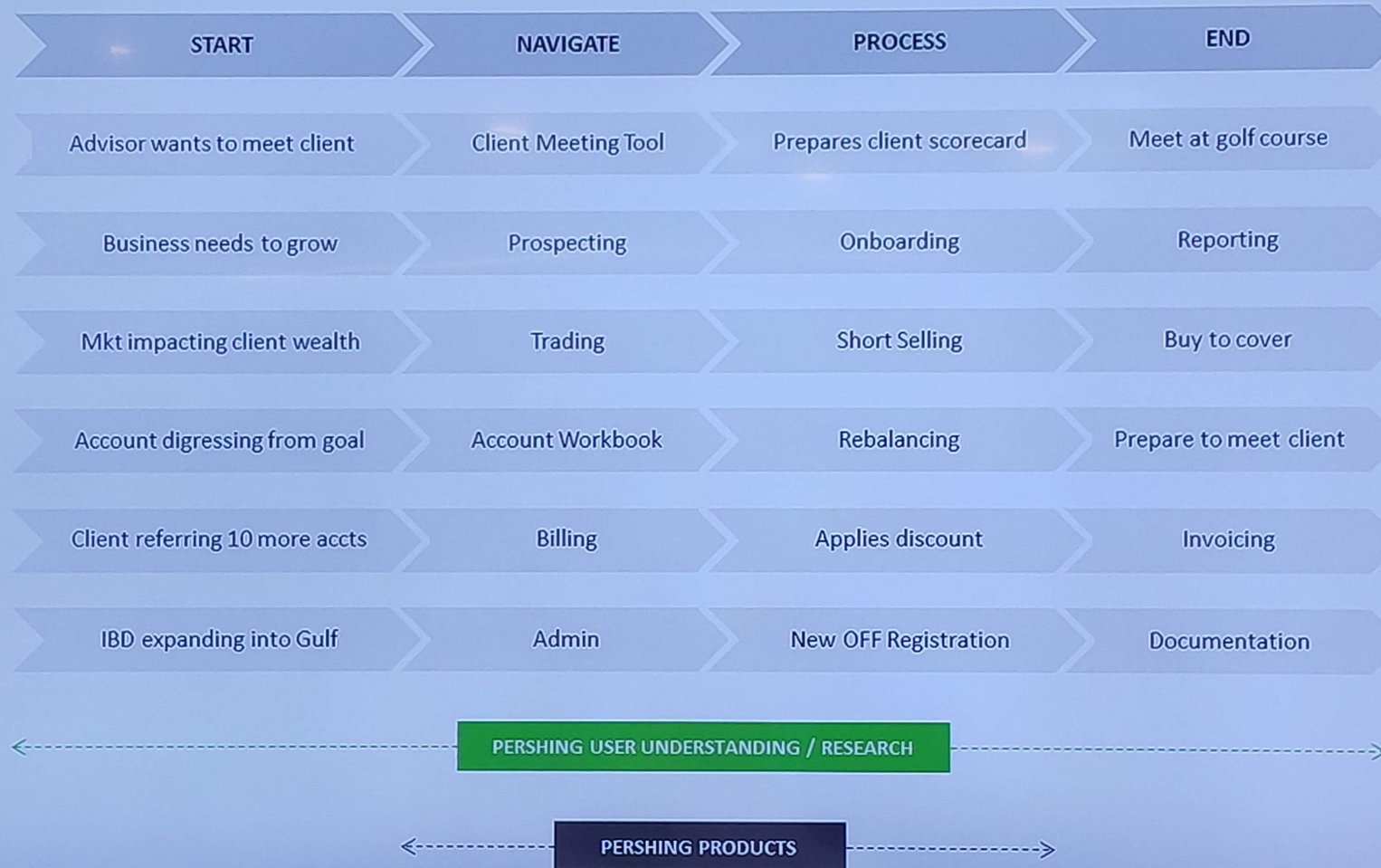




## CURRENT USER JOURNEY



# CURRENT USER JOURNEY





# CUSTOMER JOURNEY MAP



# SWOT

## STRENGTHS

- Feature-rich, fit-for-all
- Strong research basis
- Under the same hood

## WEAKNESSES

- Believe users are always and only correct
- Hardly experiment

## OPPORTUNITIES

- Needs just grow with user
- Current setup to be our Launchpad
- We can "KISS"

## THREATS

- Need-of-the-hour
- Damage control
- Pray for the ultimate cleanup to happen

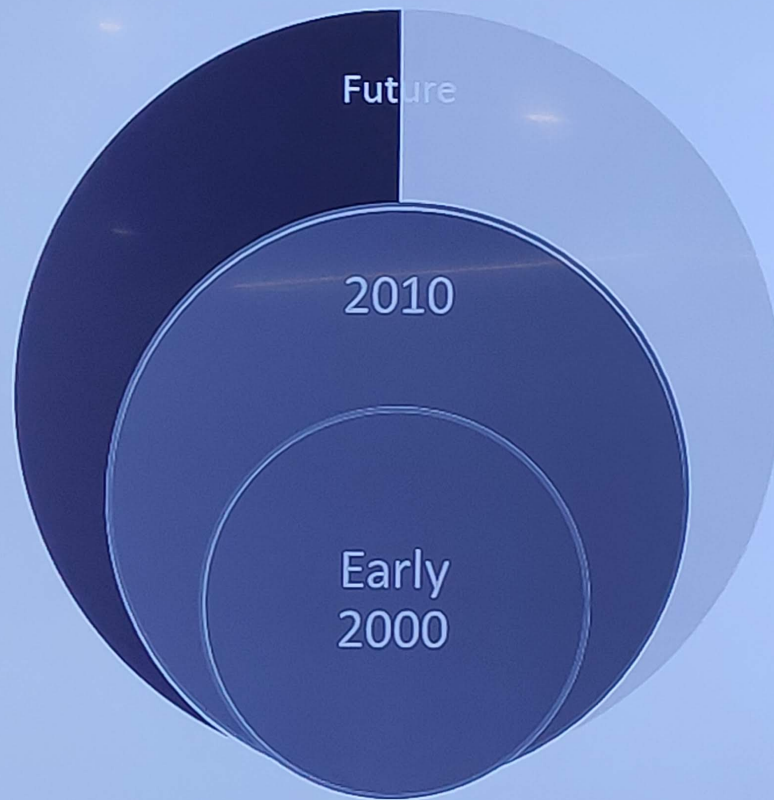


The reality is  
we were never too weak

*We are the future*

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## THE FUTURE



### Integrated Wealth Mgmt

- 3 portal integration
- Unified access
- Touchpoints



## THE FUTURE



### The calling!

- Experience Overhauling
- Unified
- Long term

OUR GUY...



N E U X



Icons CC 3.0 by [www.flaticon.com](http://www.flaticon.com)

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NEUX PHILOSOPHY

NOT

what we **KNOW** about our users

BUT

what we **WANT** our users to experience

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From

*looking forward*

To

Forward looking



## NEUX PHILOSOPHY

User focused

Persona driven

Guided UX

Triggers

Start & Stop

The need of the hour!

Customer focused

Usage driven

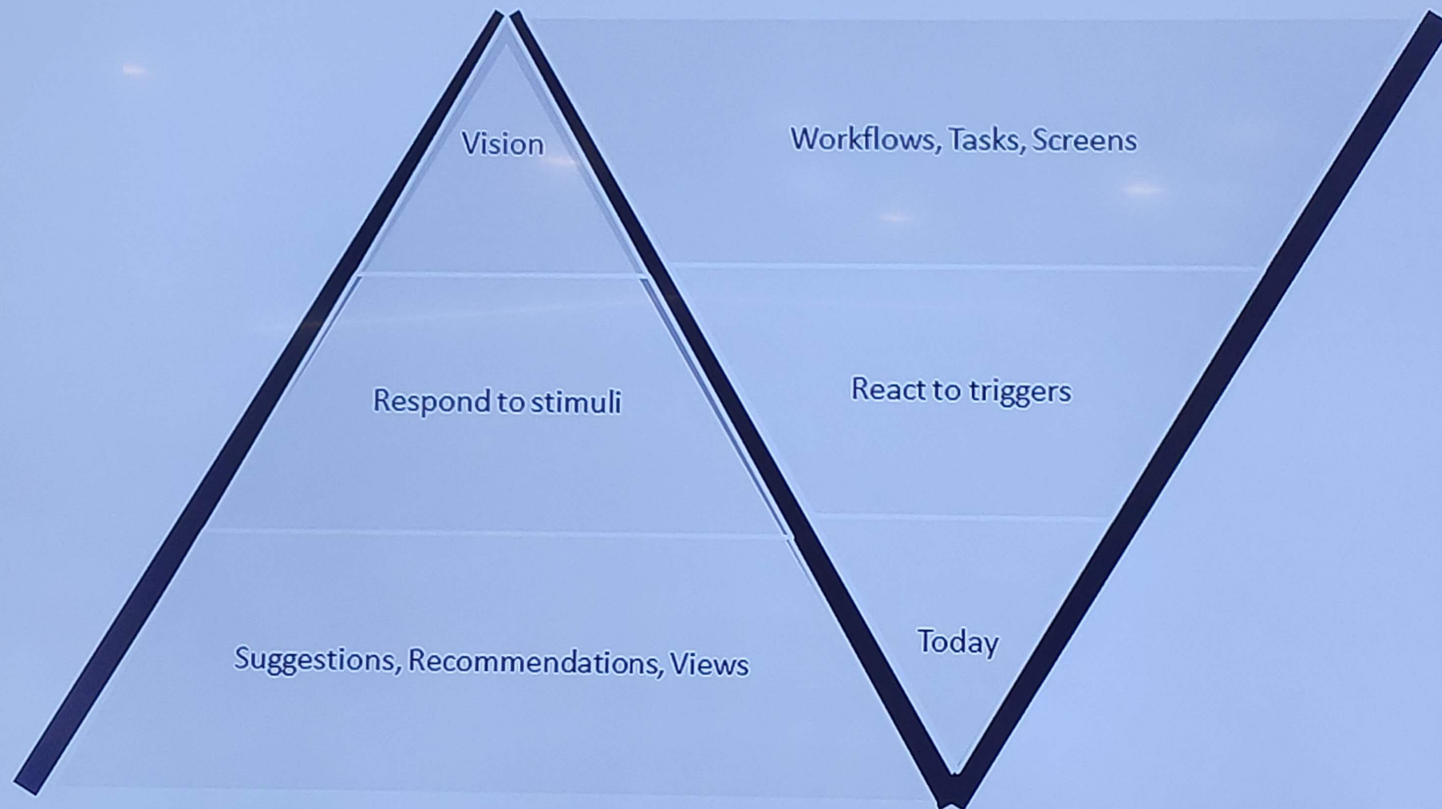
Suggestive CX

Stimuli

Use & Stay

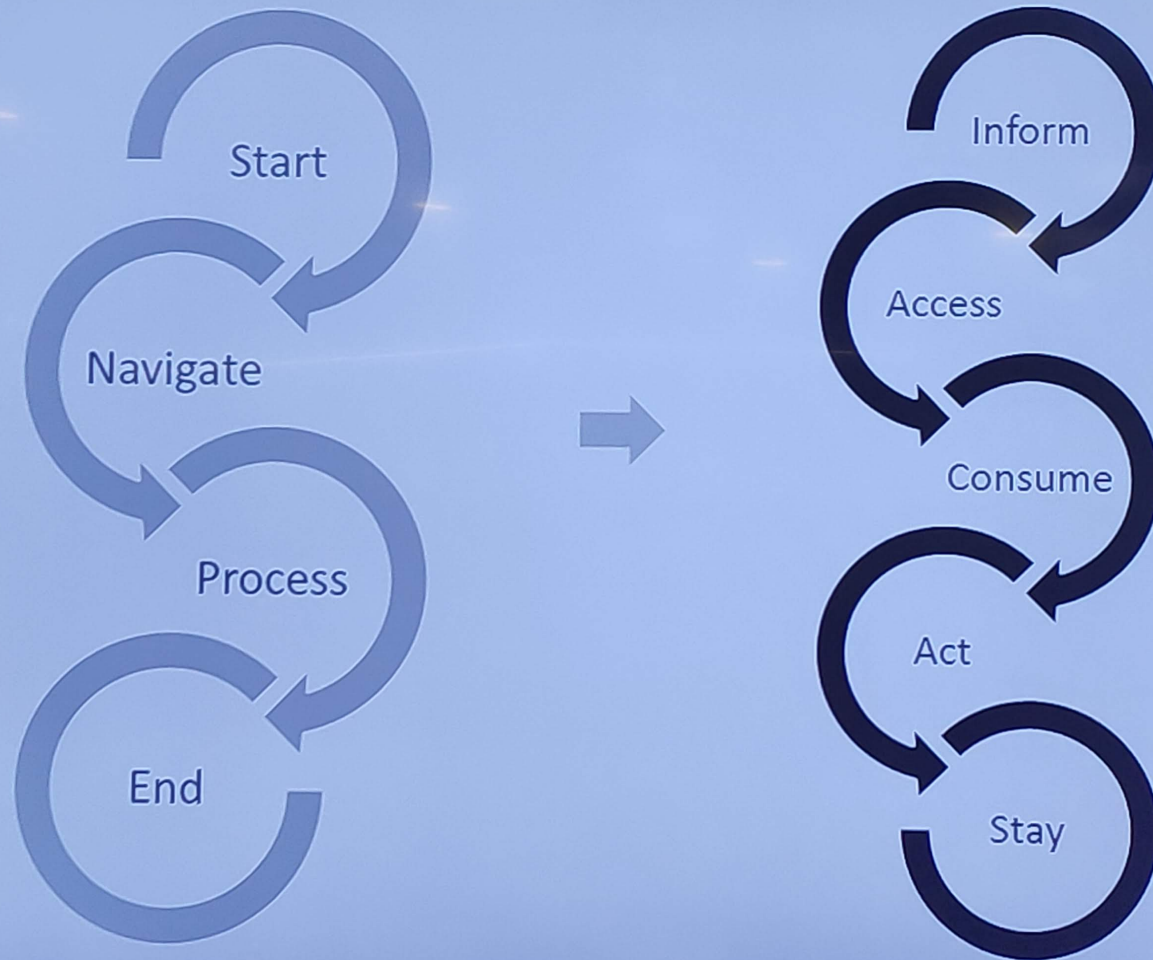
Here I stay ...

# NEUX PHILOSOPHY





## PROPOSED EXPERIENCE JOURNEY





# EMPATHY MAP





# THE CHANGE

Advisor wants to meet client

Client Meeting Tool

Prepares client scorecard

Meet at golf course



## INFORM

- Collect the list of clients (view) who need special attention
- Differentiate this view from other less important ones

VIEW

## ACCESS

- Extract meaningful information (stimuli) from all info sources like wealth mgmt needs, business strategy etc
- Make this information "available" for the user

AVAILABILITY

## CONSUME

- Ascertain the intrinsic action(s), related & suggested action(s)
- Recommend / predict / opt to automate / remember / schedule some tasks

MULTITASK

## ACT

- Follow current User Journeys for various business processes / user needs

FUNCTIONAL

## STAY

- Gamify the experience to make it rewarding, enjoyable, *memorable*
- Positive vibes help users to recommend the experience to others, share success stories etc

CHERISHING

# SWOT

## STRENGTHS

- One platform for all but made to work for each
- KISSed
- Unfired

## WEAKNESSES

- Not research driven
- Not evidence backed
- Might fail

## OPPORTUNITIES

- Being future-proof

## THREATS

- All doors closed!





# TRADE WITHOUT ANY BOUNDARIES

## Trading and Credit Risk Management System

We have built a simplified software product for trading Companies. The system provides a complete view of Transaction across various business functions in real time.

Be it Trading, Operations, Treasury, Underwriters, all data can be monitored and insights can be drawn into actionable decision making.

## KEY BUSINESS DRIVERS

We believe that there is only one way to make a profitable trade - by making the right judgment, based on the available information.



### Growth

Can operate across multiple Geographical Worldwide.



### Cost

Can provide aggregate risk Management and back office efficiencies.



### User Experience

Can be simple yet futuristic with a proven next generation technology.

## TOP FEATURES

We believe that there is only one way to trade - by making the right judgment.



Treasury can track and manage bank utilization and customer utilization which helps them to allocate and request new credit.



Trader can anticipate and book trade much in advance based on Dues report.



The Trade feature helps trader and operations to manage the life cycle of trade until shipment, settlement happens.



Trader can combine/group purchase and sales contracts.



Automatic bank utilisation calculations based on trades, settlements.



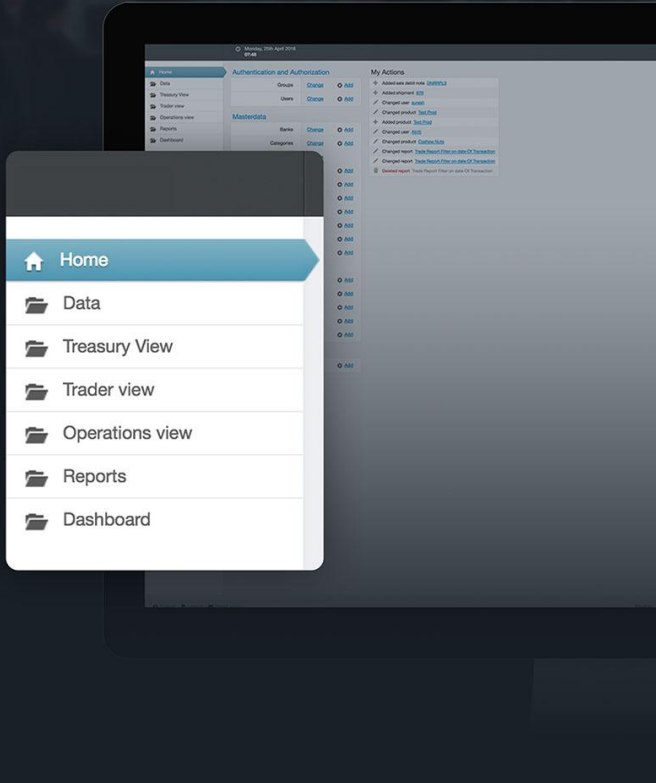
Set of reports available on demand.



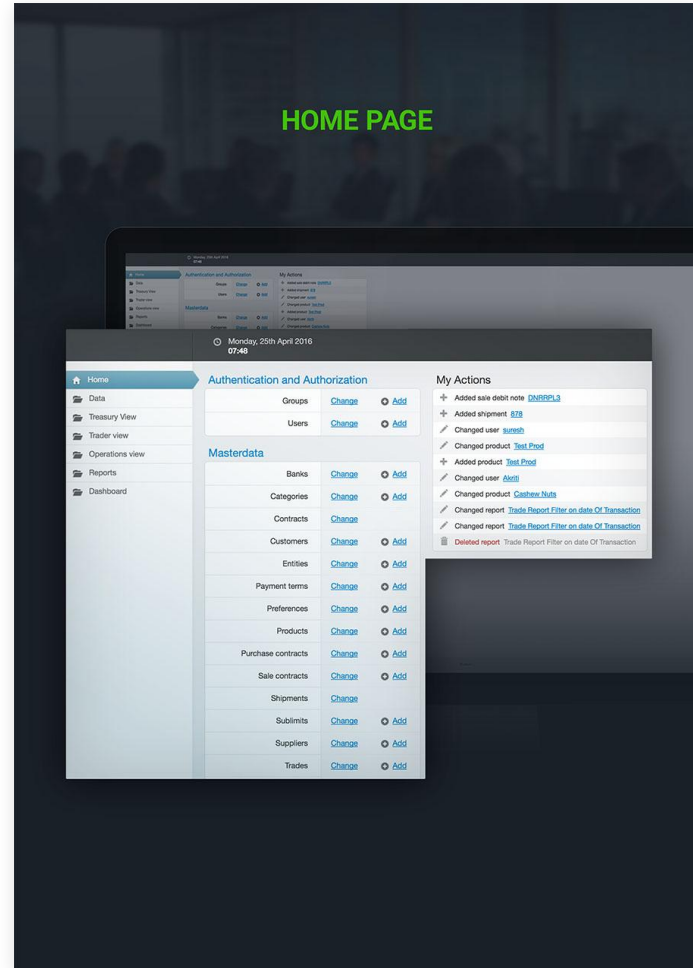
Dynamic view of information available to C- Level Execs for agile decision making.



## MENU



## HOME PAGE



## DASHBOARD

**Total Credit Limit**

\$651,000,000

**Total Bank Utilisation**

\$38,593,306

**Available Credit Amount**

\$612,406,694

**Data Filter**

**Today**

Yesterday

Last 7 Days

Last 30 Days

This Month

Last Month

This Year

Custom Range

Apply Cancel

**Top Customers by Sales**

[illegible]



## UPDATE TRADE

[Go Back](#)

### Trade (Approved)

**Trade Info**

Trader:  Entity\*:  2 Date of Transaction:

**Product Info**

Product\*:  Sub Product\*:

**Purchase**

**Purchase #STT7/77**

Payment type:  1  
 Supplier\*:  2  
 Quantity\*:   
 Price:   
 Tenor:   
 Quality:   
 Tolerance lower limit:  1  
 Tolerance upper limit:  1  
 Percentage financed:   
 Country:   
 Incoterms:  1  
 Lead discharge term:  1  
 Cargo origin:   
 Mill:

**Purchase Trade Cost**

Freight:  Seller liability insurance:   
 Charterer liability insurance:  Lead survey:   
 Discharge survey:   
 Banking:  LC confirmation:   
 Financing:  Credit insurance:   
 Logistics:  Purchase commission:   
 Discounting:

**Sale**

**Sale #STT8/8**

Sale type\*:  1  
 Payment type:   
 Customer\*:  2  
 Quantity\*:   
 Price:   
 Tenor:   
 Expected shipment date:   
 Quality:   
 Tolerance lower limit:  1  
 Tolerance upper limit:  1  
 Incoterms:  1  
 Lead discharge term:  1  
 Country:   
 Disembarkment port:   
 Discharge port:

**Sale Trade Cost**

Freight:  Seller liability insurance:   
 Charterer liability insurance:  Lead survey:   
 Discharge survey:   
 Banking:  LC confirmation:   
 Financing:  Credit insurance:   
 Logistics:  Sales commission:   
 Discounting:

**Save Trade**

[Save](#)  
[Submit For Approval](#)  
[Approve](#)  
[Reject](#)

**Purchase Info**

Supplier	Qty	Price
Acadpo Pte Ltd	1000	425
<b>Total Cost</b>		0
<b>Total Cost</b>		40700

**Sale Info**

Customer	Qty	Price
Triumph Agri Pte Ltd	1000	441
<b>Trade Cost</b>		0
<b>Total Cost</b>		44100

**Comments**

**Attach Docs**

[Choose File](#)

## PAYMENT

Monday, 25th April 2016 07:02

[Home](#) - [Masterdata](#) - [Shipments](#) - [Shipment/ Invoice/ Payment](#) - 5

**CONTRACT ID - S1609-821**

**Sale Trade Ticket - STT7 - RRPL ()**

Customer	Sujana Metal Products
Product	Scrap
SubProduct	Shredded
Price	\$491
Quantity	500
Tolerance Upper Limit	1
Payment Type	LC
Tenor	150

**Estimated Costs**

Freight	\$0	Seller Liability Insurance	\$0
Charterer Liability Insurance	\$0	Lead Survey	\$0
Discharge Survey	\$0	Banking	\$0
LC Confirmation	\$0	Financing	\$0
Credit Insurance	\$0	Logistics	\$0
Sales Commission	\$0	Discounting	\$0

None selected - [Print Invoice](#)

Sale ticket:  1  
 Bank:  1 / [O](#)  
 Underwriter:  1 / [O](#)  
 Percentage financed:   
 Discounting date:  [Today](#) [E](#)

**Shipment / Invoices**

Shipment / Invoice:

Vessel:

Shipment date:  [Today](#) [E](#) Invoice date:  [Today](#) [E](#)

Quantity:  Price:

[Shipment Costs \(Show\)](#)

[illegible]

# REPORTS



Cals ▼

Refresh from DataBase

FV15 : X15H16 : JV16 : X16H17 : JV17 : X17H18 : JV18 : Cal14 : Cal15 : Cal16 : Cal17 : Cal18

[illegible][illegible]

## Select Date

14-12-2015

14-12-2015

14-12-2015

## Create your own Tags

Type your Tag

For Me

For Group

## Group Tags

GTA Gates T1

GTA Gates T2

## My Tags

BAC

C

GTA Gates 1

JPM

MS

Shruti

Vellita

Bhagat

FDSFD

JPM Buyer

Kota

Test

Tags will help you organise markets for searching historic data.

1. Create a Tag
2. Select a Tag
3. Click on Tag it

## Some Tag Suggestions:

MS, JPM, TraderX, Cal 17  
Siev,  
Follow Up

aaronfinch

ahavendes

alexating

andrew\_fahey

ariganthos67

atf\_underwood

atfrude

atfmikemaydick

axompaul

bcdtfs

bfaloptions

## MY MARKETS FOR 2015-12-14

Basic Search

Select Tenor ▾

Search Markets

g116 1.95 c X 1.94 @ 14.4 now b:1.9400 a:0.1440t

0.147%

0.531

1.053

26.500

-17.480

0.104

Qnt.	Start	End	Strike	Type	Vol	Cross	Ref.	SVol	Value	Delta	Gamma	Vega	Theta	Rho
1	Feb 16	Feb 16	1.9500	c	0.566	live	1.943	-0.000757%	0.147	0.531	1.053	26.500	-17.480	0.104

Tags: My: Gr:

Last Updated: 12/14 12:40:25 CST by: davidwotc

Select Tag ▾

Tag It for Me

Select Tag ▾

Tag it for Group

Notes:

ⓐ ⓑ ⓓ

g1.70put b:act

0.0570

-0.225

0.745

20.000

-13.870

0.142

Qnt.	Start	End	Strike	Type	Vol	Cross	Ref.	SVol	Value	Delta	Gamma	Vega	Theta	Rho
1	Feb 16	Feb 16	1.7000	p	0.566	live	1.945	0.032592%	0.057	-0.225	0.748	20.000	-13.870	0.142

Tags: My: Gr:

Last Updated: 12/14 12:40:23 CST by: bflan92

Select Tag ▾

Tag It for Me

Select Tag ▾

Tag it for Group

Notes:

ⓐ ⓑ ⓓ

z162.60 strd .5725/5875 b:0.5725 a: 0.5875 t:

0.594%

0.074

1.046

196.600

-8.340

2.082

Qnt.	Start	End	Strike	Type	Vol	Cross	Ref.	SVol	Value	Delta	Gamma	Vega	Theta	Rho
1	Dec16	Dec16	2.6000	p	0.300	live	2.571	0.000007%	0.311	-0.463	0.523	98.300	-4.170	1.041
1	Dec16	Dec16	2.6000	c	0.300	live	2.571	0.000007%	0.283	-0.537	0.523	98.300	-4.170	1.041

Tags: My: Gr:

Last Updated: 12/14 12:40:18 CST by: scotswgreason

Select Tag ▾

Tag It for Me

Select Tag ▾

Tag it for Group

Notes:

ⓐ ⓑ ⓓ

g v s h 1.50 pspd live .008/011 b:0.0800 a:0.0110 t:

0.012%

-0.017

-0.049

5.600

1.150

0.092

Qnt.	Start	End	Strike	Type	Vol	Cross	Ref.	SVol	Value	Delta	Gamma	Vega	Theta	Rho
-1	Feb 16	Feb 16	1.5000	p	0.560	live	1.945	0.065856%	0.020	-0.095	0.401	11.200	-7.990	0.153
1	Mar 16	Mar 16	1.5000	p	0.522	live	2.006	0.077842%	0.032	-0.112	0.352	16.800	-6.840	0.245

Tags: My: Gr:

Last Updated: 12/14 12:39:48 CST by: lizzyedgel

Select Tag ▾

Tag It for Me

Select Tag ▾

Tag it for Group

Notes:

ⓐ ⓑ ⓓ

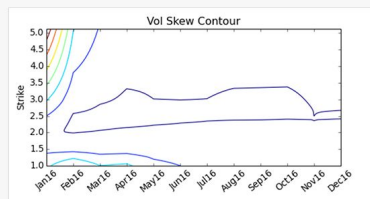
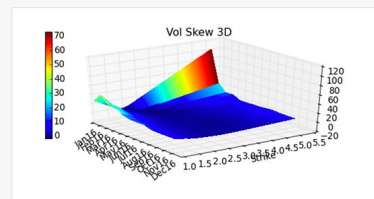
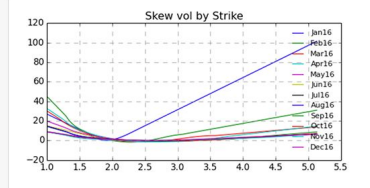
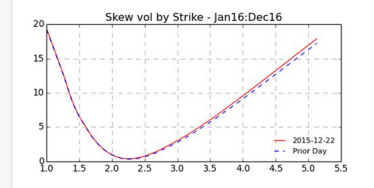
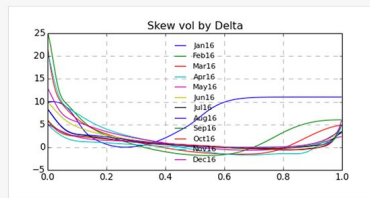
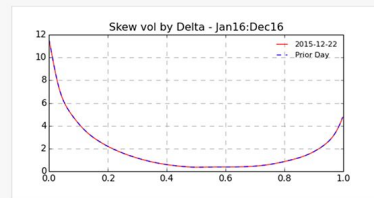


Matrix Settles Vol&OI PD&OI Skew IVHist

Tenor : F16Z16

Seasons ▾

Cals

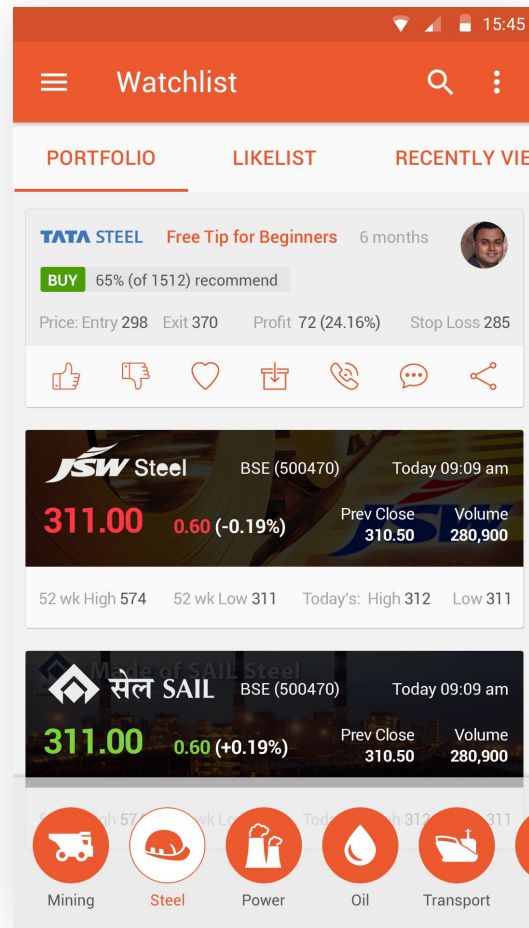
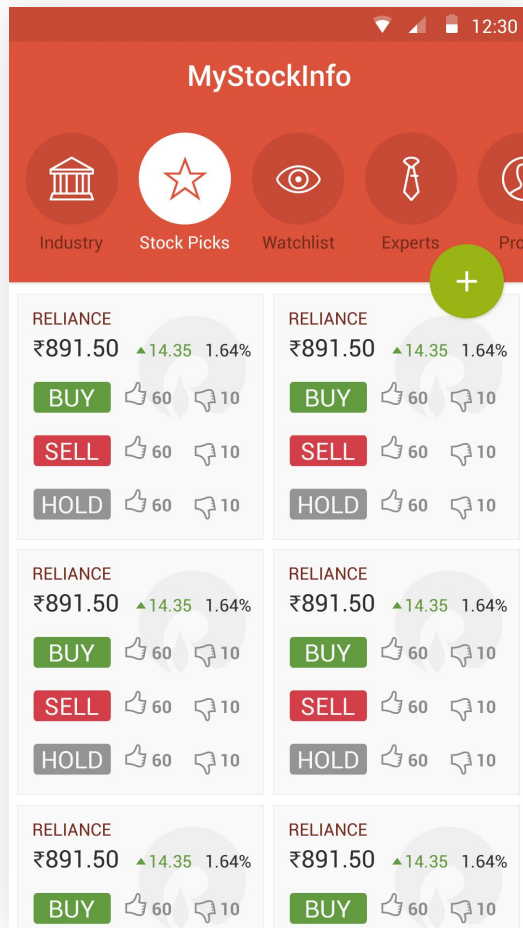
[Prev](#) | [Next](#)[illegible]

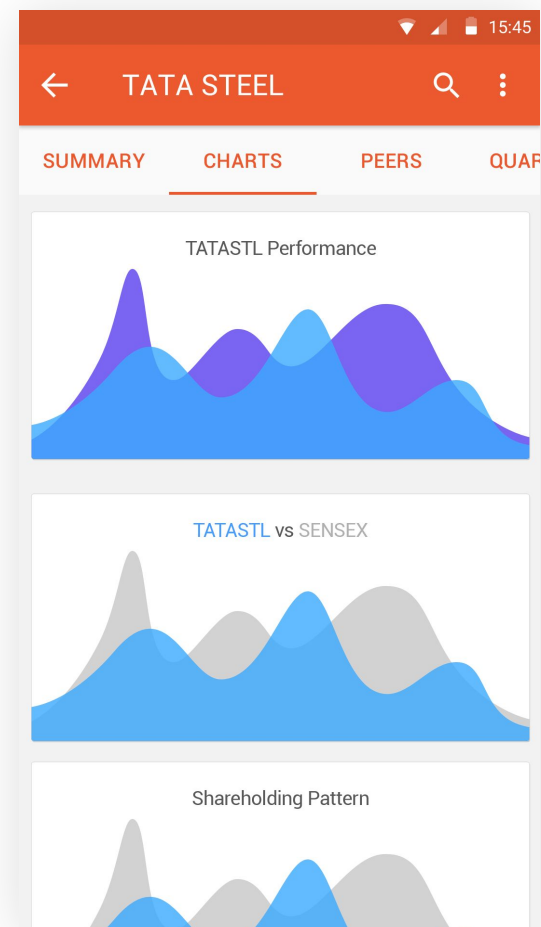
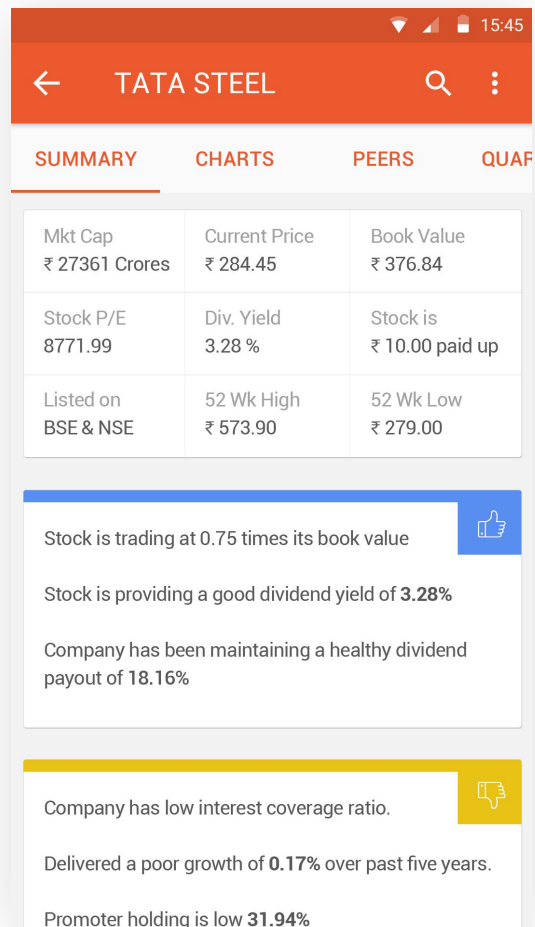
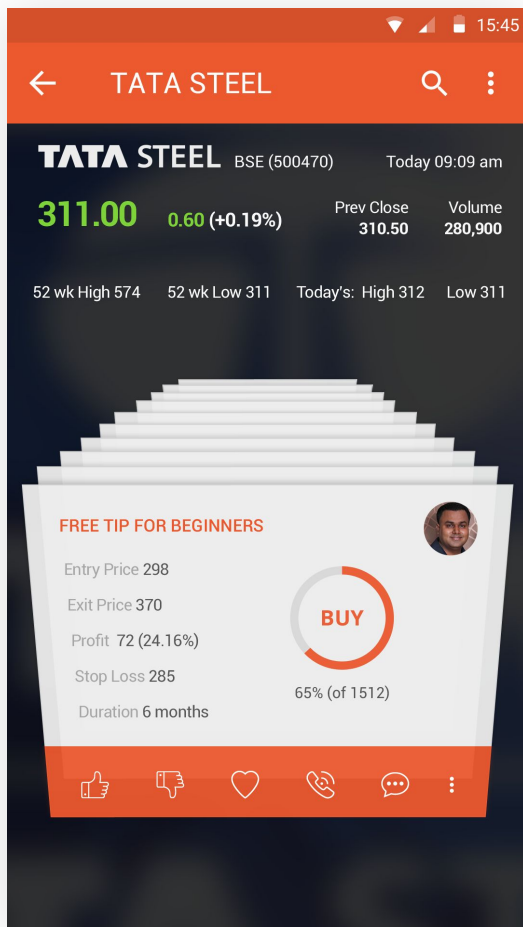
Trade Analysis					Q	Login	
Matrix			F16Z16				
FV15 : X15H16 : JV16 : X16H17 : JV17							
Month	Jan 16	Jan 16	Feb 16	Feb 16			
Price	1.837	1.837	1.837	1.837			
Y.Price	1.767	+0.070	1.767	+0.070			
Vol	1.736	0.736	1.736	0.736			
Y Vol	0.664	+0.072	0.664	+0.072			
Strd Strike	1.800	1.850	1.800	1.850			
Strd	0.158	0.154	0.158	0.154			
Call/Put	Strk	Call	Put	Strk	Call	Put	
1.50	0.343	0.006	1.50	0.343	0.006	1.50	
1.75	0.130	0.043	1.75	0.130	0.043	1.75	
2.00	0.021	0.043	2.00	0.021	0.043	2.00	
2.25	0.003	0.184	2.25	0.003	0.184	2.25	
2.50	0.001	0.416	2.50	0.001	0.416	2.50	
2.75	0.000	0.664	2.75	0.000	0.664	2.75	
3.00	0.000	0.913	3.00	0.000	0.913	3.00	
3.25	0.000	1.163	3.25	0.000	1.163	3.25	
3.50	0.000	1.413	3.50	0.000	1.413	3.50	
3.75	0.000	1.663	3.75	0.000	1.663	3.75	
4.00	0.000	1.913	4.00	0.000	1.913	4.00	
4.25	0.000	2.163	4.25	0.000	2.163	4.25	
4.50	0.000	2.413	4.50	0.000	2.413	4.50	
4.75	0.000	2.663	4.75	0.000	2.663	4.75	
5.00	0.000	2.913	5.00	0.000	2.913	5.00	

Trade Analysis												
Matrix				F16Z16								
FV15 : X15H16 : JV16 : X16H17 : JV17												
Month	Jan 16	Jan 16	Feb 16	Feb 16								
Price	1.837	1.837	1.837	1.837								
Y.Price	1.767	+0.070	1.767	+0.070								
Vol	1.736	0.736	1.736	0.736								
Y Vol	0.664	+0.072	0.664	+0.072								
Strd Strike	1.800	1.850	1.800	1.850								
Strd	0.158	0.154	0.158	0.154								
Call/Put												
Call/Put	Strk	Call	Put	Strk	Call	Put	Strk	Call	Put	Strk	Call	Put
1.50	0.343	0.006		1.50	0.343	0.006		1.50	0.343	0.006		1.50
1.75	0.130	0.043		1.75	0.130	0.043		1.75	0.130	0.043		1.75
2.00	0.021	0.043		2.00	0.021	0.043		2.00	0.021	0.043		2.00
2.25	0.003	0.184		2.25	0.003	0.184		2.25	0.003	0.184		2.25
2.50	0.001	0.416		2.50	0.001	0.416		2.50	0.001	0.416		2.50
2.75	0.000	0.664		2.75	0.000	0.664		2.75	0.000	0.664		2.75
3.00	0.000	0.913		3.00	0.000	0.913		3.00	0.000	0.913		3.00
3.25	0.000	1.163		3.25	0.000	1.163		3.25	0.000	1.163		3.25
3.50	0.000	1.413		3.50	0.000	1.413		3.50	0.000	1.413		3.50
3.75	0.000	1.663		3.75	0.000	1.663		3.75	0.000	1.663		3.75
4.00	0.000	1.913		4.00	0.000	1.913		4.00	0.000	1.913		4.00
4.25	0.000	2.163		4.25	0.000	2.163		4.25	0.000	2.163		4.25
4.50	0.000	2.413		4.50	0.000	2.413		4.50	0.000	2.413		4.50
4.75	0.000	2.663		4.75	0.000	2.663		4.75	0.000	2.663		4.75
5.00	0.000	2.913		5.00	0.000	2.913		5.00	0.000	2.913		5.00
5.25	0.000	3.162		5.25	0.000	3.162		5.25	0.000	3.162		5.25

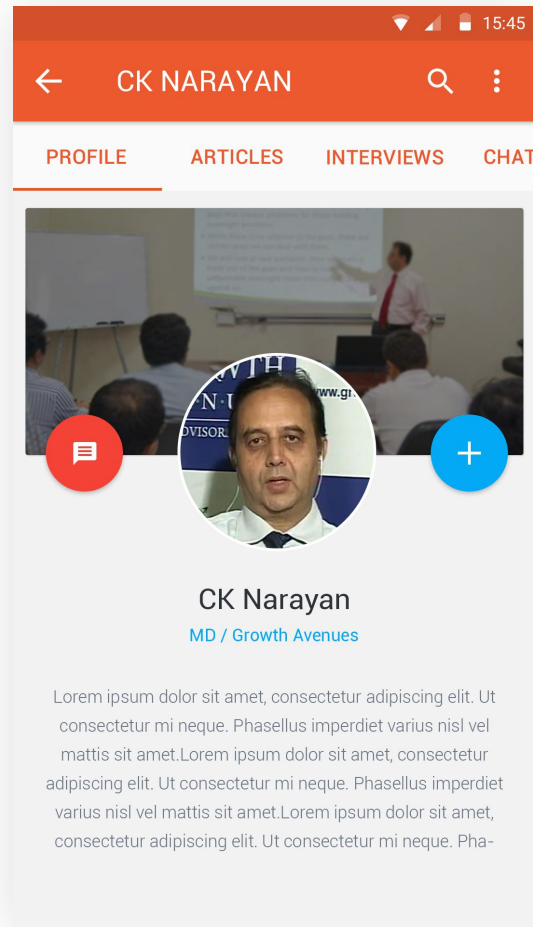
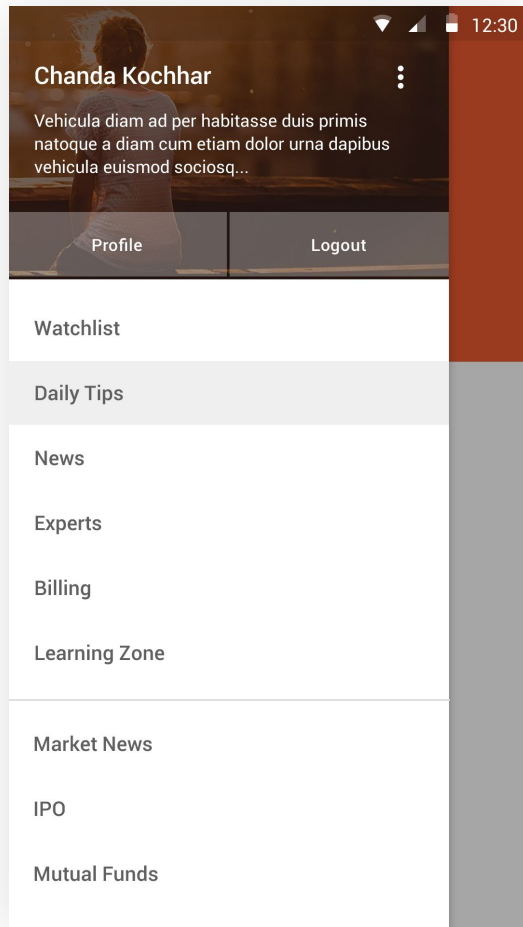
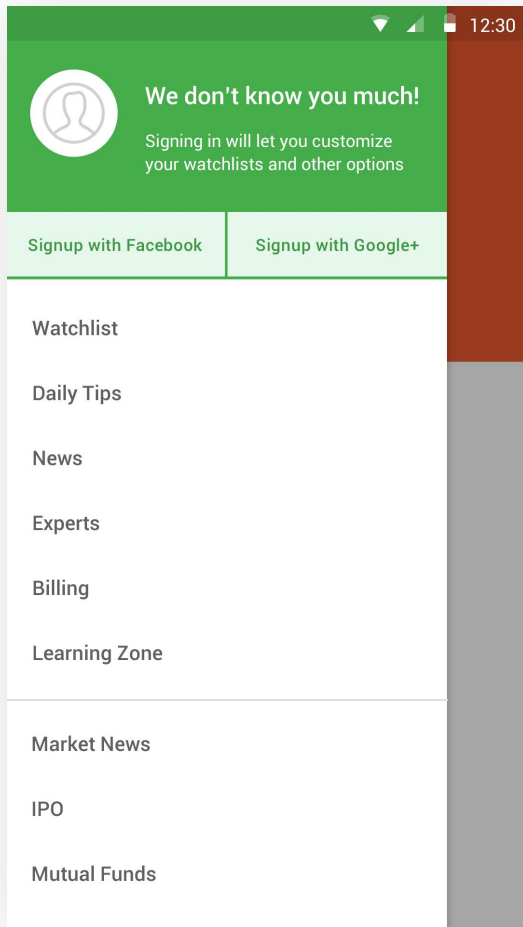
Trade Analysis					Login			
Matrix			F16Z16					
<div>Matrix</div> <div>Settles</div> <div>Vol&amp;OI</div> <div>Pd&amp;OI</div> <div>Skew</div> <div>IVHist</div>			FV15 : X15H16 : JV16 : X16H17 : JV17					
			Jan 16		Feb 16		Feb 16	
			1.837		1.837		1.837	
			+0.070		1.767		+0.070	
			0.736		1.736		0.736	
Y Vol	>	0.664	+0.072	0.664	+0.072			
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Call/Put			Strk	Call	Put	Strk	Call	Put
1.50	0.343	0.006	1.50	0.343	0.006	1.50	0.343	0.006
1.75	0.130	0.043	1.75	0.130	0.043	1.75	0.130	0.043
2.00	0.021	0.043	2.00	0.021	0.043	2.00	0.021	0.043
2.25	0.003	0.184	2.25	0.003	0.184	2.25	0.003	0.184
2.50	0.001	0.416	2.50	0.001	0.416	2.50	0.001	0.416
2.75	0.000	0.664	2.75	0.000	0.664	2.75	0.000	0.664
3.00	0.000	0.913	3.00	0.000	0.913	3.00	0.000	0.913
3.25	0.000	1.163	3.25	0.000	1.163	3.25	0.000	1.163
3.50	0.000	1.413	3.50	0.000	1.413	3.50	0.000	1.413
3.75	0.000	1.663	3.75	0.000	1.663	3.75	0.000	1.663
4.00	0.000	1.913	4.00	0.000	1.913	4.00	0.000	1.913
4.25	0.000	2.163	4.25	0.000	2.163	4.25	0.000	2.163
4.50	0.000	2.413	4.50	0.000	2.413	4.50	0.000	2.413
4.75	0.000	2.663	4.75	0.000	2.663	4.75	0.000	2.663
5.00	0.000	2.913	5.00	0.000	2.913	5.00	0.000	2.913
5.25	0.000	3.162	5.25	0.000	3.162	5.25	0.000	3.162











# Stock Recommendation User Experience

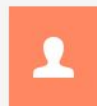




LOGIN

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CLIENTS  
250



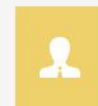
REVENUES  
\$215M



PRODUCTS  
52

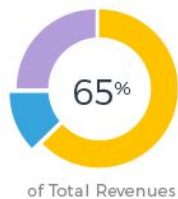


OPPORTUNITIES  
\$23M



SALES PEOPLE  
12

#### Top 10 Clients



#### Top 10 Products



#### Top 10 Leads



#### Top Recommendations



UTI Mastershare Unit Scheme	6	UTI Mastershare Unit Scheme	6	UTI Mastershare Unit Scheme	6
UTI Mastershare Unit Scheme	5	UTI Mastershare Unit Scheme	5	UTI Mastershare Unit Scheme	4
UTI Mastershare Unit Scheme	3	UTI Mastershare Unit Scheme	3	UTI Mastershare Unit Scheme	2

CLIENT PRODUCT SALES PERSON

BAJAJ  
FINANCE

Bajaj Finance Limited

S

USA \$1.85M 📈 \$134,213

35 Existing Products &gt;

BAJAJ  
FINANCE

Bajaj Finance Limited

B

USA \$1.85M 📈 \$134,213

35 Existing Products &gt;

BAJAJ  
FINANCE

Bajaj Finance Limited

S

USA \$1.85M 📈 \$134,213

35 Existing Products &gt;

BAJAJ  
FINANCE

Bajaj Finance Limited

S

USA \$1.85M 📈 \$134,213

## RECOMMENDED PRODUCTS BAJAJ FINANCE LIMITED

DSP BLACKROCK 1

Top 100 Equity Fund

Avg Cost 64121



DSP BLACKROCK 1

Top 100 Equity Fund

Avg Cost 64121



DSP BLACKROCK 1

Top 100 Equity Fund

Avg Cost 64121



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BAJAJ  
FINANCE

Bajaj Finance Limited

S

USA \$1.85M 📈 \$134,213

Franklin India Opportunities..

UTI Equity Fund

UTI Mastershare Unit Scheme

UTI Top 100 Fund



BOI AXA Equity Fund

Franklin India Bluechip Fund

UTI Dividend Yield Fund

UTI Leadership Equity Fund

DSP BlackRock Top 100 Equi...

HDFC Top 200 Fund

Franklin India High Growth...

ICICI Prudential Exports and...

ICICI Prudential Value Discov...

BNP Paribas Equity Fund

Mirae Asset India Opportunit...

Reliance Equity Opportuniti...

## RECOMMENDED PRODUCTS BAJAJ FINANCE LIMITED

DSP BLACKROCK

1

Top 100 Equity Fund

Avg Cost 64121



DSP BLACKROCK

1

Top 100 Equity Fund

Avg Cost 64121



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1

Top 100 Equity Fund

Avg Cost 64121



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35 Existing Products &gt;

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## RECOMMENDED PRODUCTS BAJAJ FINANCE LIMITED

DSP BLACKROCK

Top 100 Equity Fund

Avg Cost 64121



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Top 100 Equity Fund

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35 Existing Products &gt;

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35 Existing Products &gt;

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Bajaj Finance Limited

USA \$1.85M \$134,213

RECOMMENDED PRODUCTS BAJAJ FINANCE LIMITED

## DSP BLACKROCK TOP 100 EQUITY FUND

Existing Clients

placeholder



1 of 14

Recommend...	Product1	Product2	Product3	Referral CL...	New Client...	Product Ratio
1/11 Wadsworth Gold Scheme	1/11 Top 100 Fund	1/11 Wadsworth Multiple Fund	DSP BlackRock Focus 25 Fund	2	64121	97
1/11 Wadsworth Gold Scheme	1/11 Top 100 Fund	DSP BlackRock Top 100 Equity Fund	JPMorgan India Mid and Small Cap Fund	2	64121	96
1/11 Wadsworth Gold Scheme	1/11 Top 100 Fund	1/11 Top 100 Equity Fund	1/11 Wadsworth Multiple Fund	2	64121	96
1/11 Wadsworth Gold Scheme	1/11 Top 100 Fund	1/11 Wadsworth Multiple Fund	1/11 Wadsworth Multiple Fund	2	64121	96
1/11 Wadsworth Gold Scheme	DSP BlackRock Top 100 Equity Fund	1/11 Wadsworth Multiple Fund	Birla Sun Life MNC Fund	2	64121	96
1/11 Wadsworth	1/11 Top 100	1/11 Dividend	DSP BlackRock	2	64121	96

TYPICAL WAVEMAKER GRID

DSP BlackRock

Top 100 Equity Fund

Avg Cost: 64121



DSP BlackRock

Top 100 Equity Fund

Avg Cost: 64121



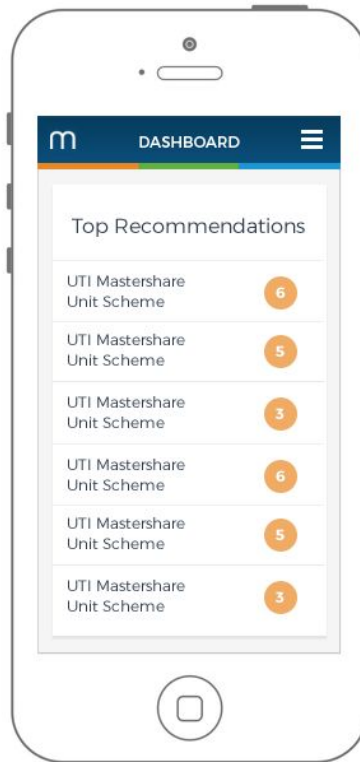
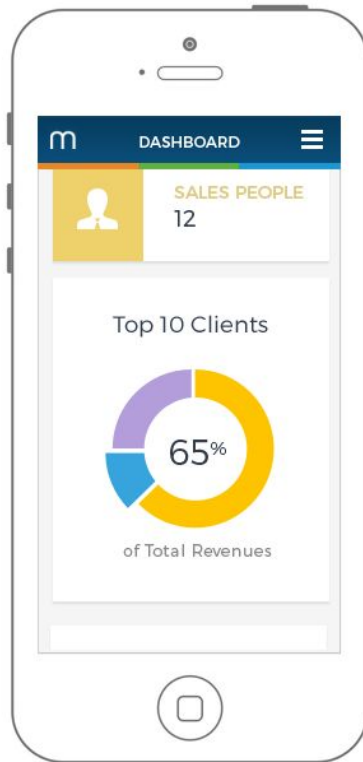
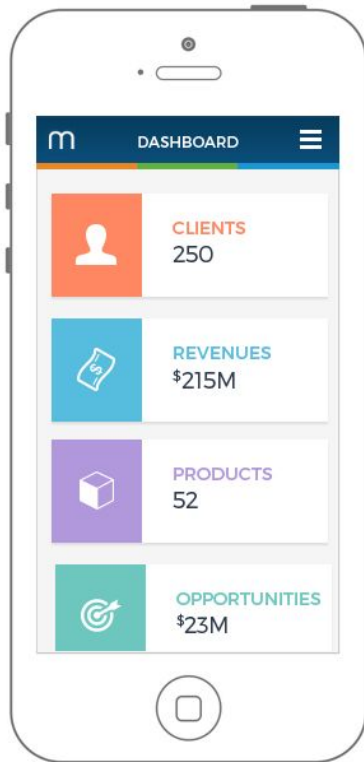
DSP BlackRock

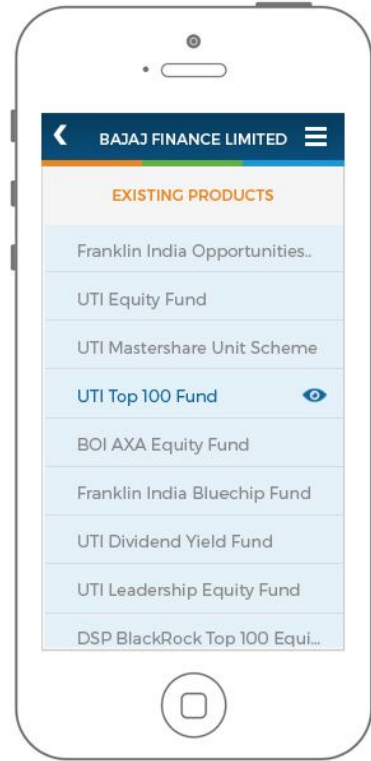
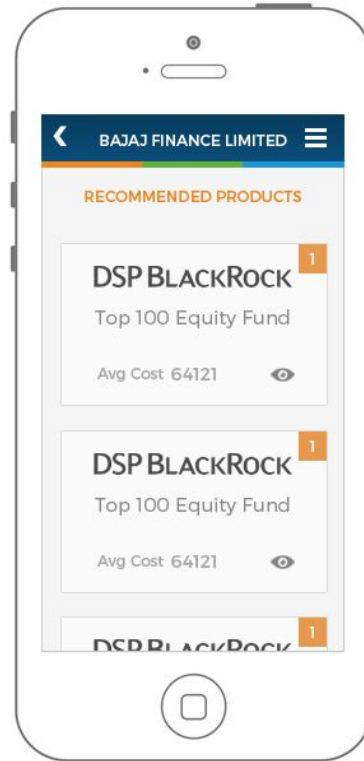
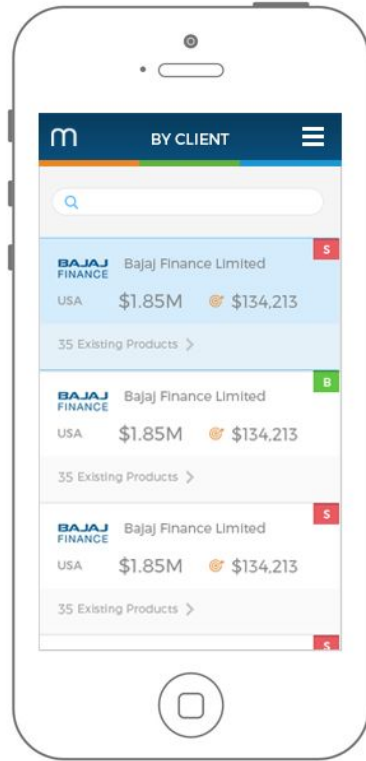
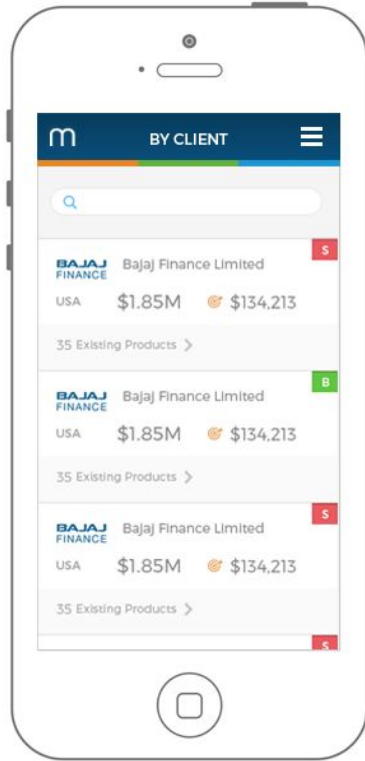
Top 100 Equity Fund

Avg Cost: 64121





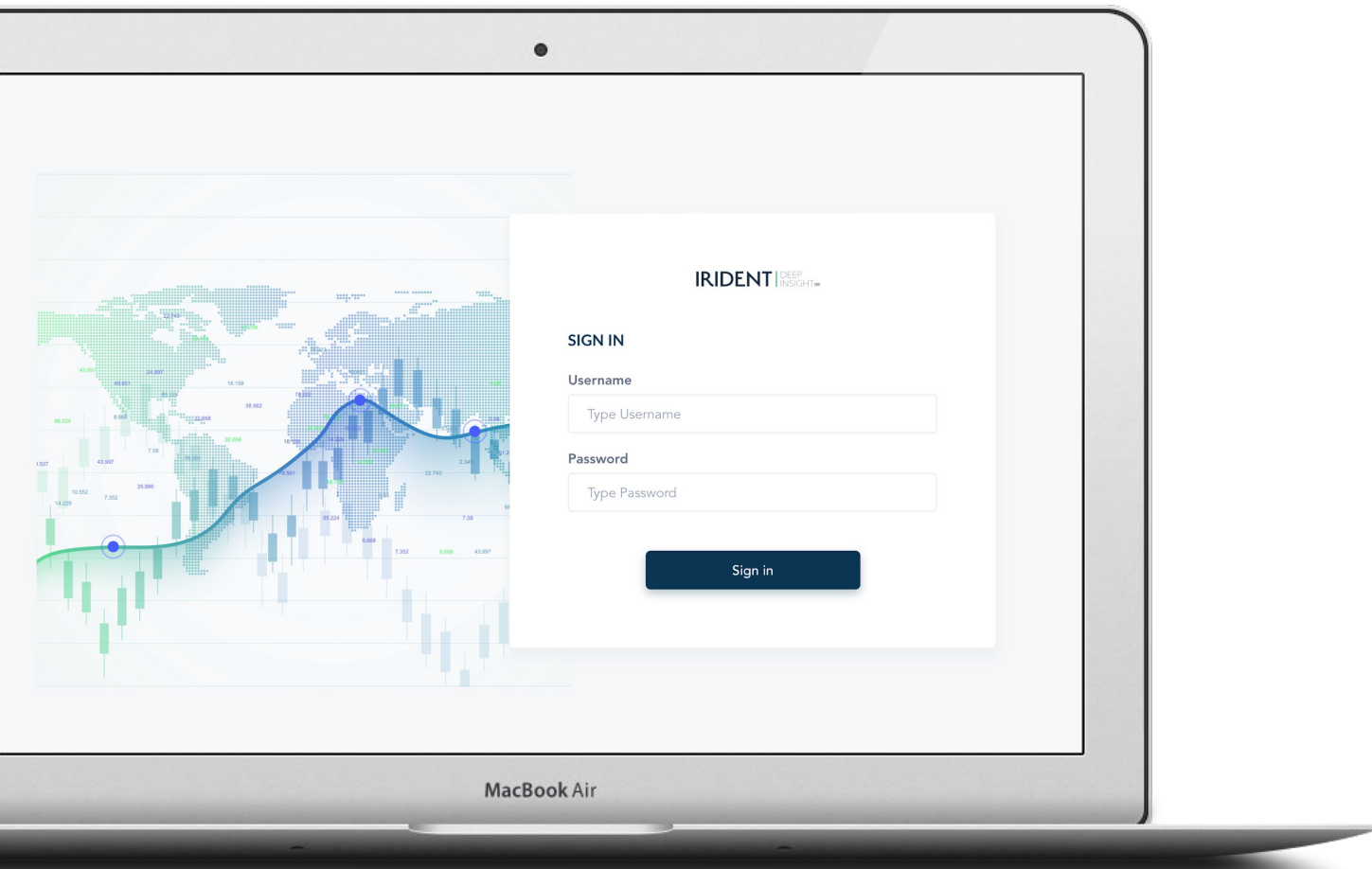




# Stock Prediction User Experience







IRIDENT | DEEP  
INSIGHT™

### SIGN IN

Username

Password

Sign in

MacBook Air

## Filters

### Benchmark

Russell 1000(R) Index

Russell 1000 Growth(R) Index

Russell 1000 Value(R) Index

### Ticker

IIJK

### Model

M2

### Prediction Window

Weekly

### Prediction Delay

1 Day

### Date Range

Start Date End Date

Proceed

Clear

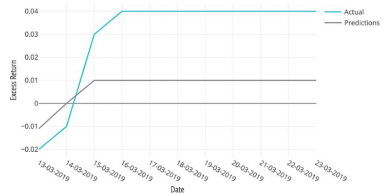
## Predictions

Ranking

Portfolio

## Predictions

Prediction Plot



## Error Metrics

Predictive correlation	RMS ⓘ	RMSE	MAE	MAPE	
0.01	0.01	0.02	0.01	0.03	⋮



## Filters

## Benchmark

Russell 1000(R) Index

Russell 1000 Growth(R) Index

Russell 1000 Value(R) Index

## Prediction Date

13-03-2019



## Prediction Window

Weekly



## Prediction Delay

1 Day



## Model

M2



## Number of Stocks

10



## Ranking Type

Excess Return



Proceed

Clear

Predictions

Ranking

Portfolio

## Ranking



Rank	Company	FactSet-ID	Predicted Returns	RMSE	TE	Excess Return	
1	Apple Inc.	MH33D6-R	0.01	0.02	0.01	0.03	⋮
2	Test Corp	SJY281-R	0.01	0.07	0.01	0.08	⋮
3	Test Corp	FFF382-R	0.01	0.07	0.01	0.08	⋮
4	Test Corp	M4RD8-R	0.01	0.07	0.01	0.08	⋮

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Filters

Benchmark

Russell 1000(R) Index

Russell 1000 Growth(R) Index

Russell 1000 Value(R) Index

Weighting Methodology

Risk Adjusted

RMSE

Prediction Date

13-03-2019

Prediction Window

Weekly

Prediction Delay

1 Day

Number of Stocks

10

Trading Delay

1Day

Amount Invested

\$1 Million

Transaction Costs

0.20%

Proceed

Clear

Predictions

Ranking

Portfolio

Table



Graph

Portfolio



Rank	Company	FactSet-ID	Actual Excess Return	Benchmark Excess Return	Predicted Excess Return	
1	Apple Inc.	MH33D6-R	0.01	0.01	-0.02	⋮
2	Apple Inc.	MH33D6-R	0.01	0.01	-0.02	⋮
3	Apple Inc.	MH33D6-R	0.01	0.01	-0.02	⋮
4	Apple Inc.	MH33D6-R	0.01	0.01	-0.02	⋮

Rows per page: 10 1-4 of 4 < >

Filters

Benchmark

Russell 1000(R) Index

Russell 1000 Growth(R) Index

Russell 1000 Value(R) Index

Weighting Methodology

Risk Adjusted

RMSE



TE

Prediction Date

13-03-2019

Prediction Window

Weekly

Prediction Delay

1 Day

Number of Stocks

10

Trading Delay

1 Day

Amount Invested

\$1 Million

Transaction Costs

0.20%

Proceed

Clear

Predictions

Ranking

Portfolio

Table ☒ Graph

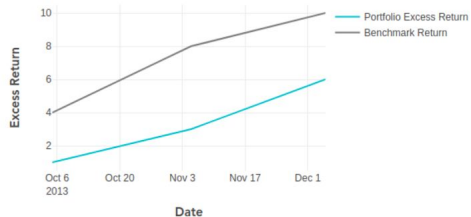
Actual vs Predicted Portfolio Excess Return



Portfolio Metrics

MSE	MAE	MAPE	RMSE	
0.01	0.01	0.03	0.02	⋮

Portfolio Performance vs Benchmark Performance



*Thanks, Lets do me*

Or I



*Icons from Autodraw, Google's AI Experiment*

SAMSUNG