

# EquityEagle



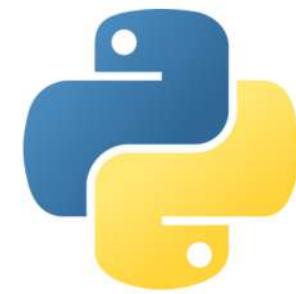
# Product Management Case Study

Presented by Varad Koppar





**django**



**MySQL®**



# Technologies Used

# Executive Summary

Investors today face scattered market data, information overload, and a lack of AI-driven insights to make smart investment decisions. Traditional stock platforms offer raw data but fail to simplify market sentiment and stock movements for easy decision-making.

- 💡 Equity Eagle is an AI-driven stock intelligence platform that empowers investors by integrating:
  - ✓ **SIP & Investment Calculators** – Making investment planning effortless.
  - ✓ **Real-Time Market News Aggregation** – Delivering consolidated financial insights.
  - ✓ **Stock-Specific Sentiment Analysis** – Using AI to track investor sentiment.
  - ✓ **Top Gainers & Losers Tracking** – Identifying market trends at a glance.

Unlike traditional market tracking tools, Equity Eagle doesn't just show data—it provides actionable insights. With a structured SaaS business model and a roadmap for expansion, Equity Eagle is set to transform stock market intelligence.

# Problem Statement

**Information Overload & Scattered Data :** Stock prices, market trends, and sentiment insights are fragmented across multiple platforms. Investors must switch between multiple tools, wasting time and often missing crucial insights.

**Lack of Real-Time Stock Sentiment Analysis :** Most platforms provide historical data, but do not analyze how investors feel about a stock in real time. Traders have to rely on guesswork instead of structured insights.

**Too Many Subscriptions & Disconnected Tools :** Investors rely on multiple platforms for different features—one for stock tracking, another for fundamental analysis, and separate tools for sentiment analysis. This leads to high costs and inefficiency.

# Solution Outline

Equity Eagle is designed as an all-in-one stock market intelligence platform that integrates fundamental and sentiment analysis, giving investors deeper insights and helping them make better decisions faster.

1. Unified Platform for Market Insights : No more scattered data. Equity Eagle consolidates real-time sentiment tracking and fundamental analysis in a single interface, eliminating the need for multiple tools.
2. Real-Time Stock Sentiment Analysis : Go beyond historical data. Unlike traditional platforms, Equity Eagle provides real-time investor sentiment analysis, helping traders act on market perception rather than just price trends.
3. Cost-Effective & Comprehensive Alternative : Why pay for multiple subscriptions? Equity Eagle combines fundamental research and sentiment tracking in one place, reducing costs and improving efficiency for investors.

# Vision & Mission

💡 Vision: To simplify stock market analysis through AI-driven insights, empowering investors with actionable, data-backed decisions.

## **Mission:**

Make financial insights accessible to all investors, from beginners to professionals.

Bridge the gap between market data and investment decision-making.

Enable faster, smarter investing with AI-powered analytics and intuitive tools.

As the platform evolves, Equity Eagle will expand into predictive analytics, automated trading strategies, and advanced AI stock recommendations, making it a comprehensive financial intelligence system

# Objectives

Equity Eagle aims to simplify stock market decision-making by providing real-time sentiment insights and fundamental analysis in a single platform, reducing the need for multiple tools. By bridging the gap between data and education, it empowers both beginners and experienced traders with insights that explain not just stock trends but the reasoning behind them. The platform follows a scalable SaaS revenue model, offering tailored solutions for retail investors, active traders, and institutional partners. Unlike traditional market platforms that focus on raw data, Equity Eagle delivers actionable insights to help investors identify market sentiment shifts before price movements occur. With a strong focus on usability, intelligence, and growth, the platform is positioned to become the go-to stock intelligence solution for informed investing.

# Business Model

Equity Eagle follows a SaaS (Software-as-a-Service) model, structured around a Freemium-to-Premium conversion strategy that caters to a wide range of investors. The platform offers three pricing tiers, each designed to balance accessibility with advanced features for serious investors:

Plan	Target Users	Features Included	Pricing
Freemium	Active Traders, Analysts	Market News, Sentiment Analysis, Upcoming IPOs	Free
Premium	Active Traders, Analysts	Fundamental Analysis, Chart Pattern Recognition, Advanced Sentiment Insights	₹499 /month
Enterprise	Brokerage Firms, Stock Market Educators	API Access, Custom AI Reports, Educational Course Partnerships	₹2499 /year

# Feature Prioritization Using MoSCoW Method

Must-Have (MVP Features)	Should-Have (Next Iterations)	Could-Have (Future Growth)	Won't-Have (Not Required Now)
SIP & Investment Calculators	Chart Pattern Recognition	Automated AI Trading Signals	Multi-language Support
Market News Aggregation	Fundamental Analysis	AI-Based Stock Recommendations	Options Trading Simulator
Stock /overall Sentiment Analysis	Multi-Agent Tracking	Predictive AI Market Trends	Long-Term Investment Insights
Top Gainers & Losers	Watchlist & Custom Alerts	Mobile App	International Stock Market Data

# Feature Prioritization Using RICE Method

Feature	Reach (1-10)	Impact (1-10)	Confidence (1-10)	Effort (1-10)	RICE Score
SIP Calculators	9	10	9	4	20.25
Market News Aggregation	8	9	8	5	14.4
Stock Sentiment Analysis	7	8	9	5	12.6
Top Gainers & Losers	6	7	7	6	9.8

# Go-To-Market (GTM) Strategy

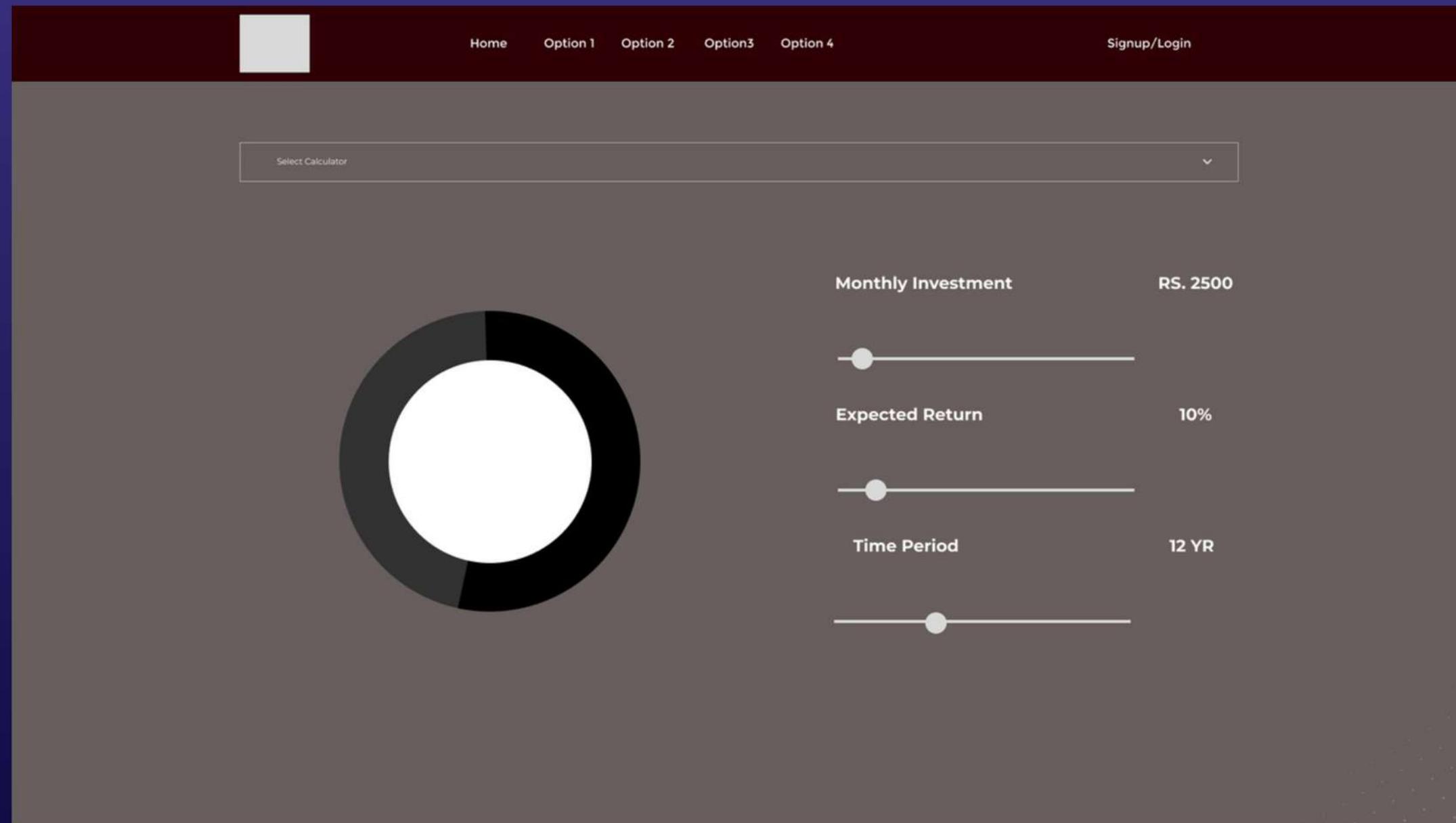
Channel	Strategy	Expected Impact
Freemium Growth Model	Attract mass users with free features and convert them into premium subscribers.	High adoption, user retention
Affiliate & Referral Marketing	Partner with trading influencers & educators for organic growth.	Increased brand visibility
Enterprise B2B Partnerships	Integrate with stock brokerage APIs for high-value collaborations.	High-revenue partnerships
Data-Driven Retention	Personalized stock alerts, AI-driven recommendations, behavioral analytics.	Higher engagement, better retention

# Execution Roadmap – Step-by-Step Product Rollout

Phase	Focus	Expected Impact	Timeline
Phase 1	MVP & Testing	SIP Calculator, Market News, Stock market Sentiment	Month 1-3
Phase 2	Scaling Features	Advanced AI Sentiment, User Dashboard	Month 4-6
Phase 3	Growth & Monetization	Premium Subscriptions, API Integrations	Month 7-9
Phase 4	Expansion	Automated Trading Signals, Predictive Analytics	Month 10-12

# Low-Fidelity Wireframe

To streamline the user experience, we designed low-fidelity wireframes in Figma, ensuring a clear and intuitive layout. The structure focused on delivering a seamless interaction flow, making complex data easy to understand. By mapping out the core functionalities early, we refined the interface for efficiency before moving into development.



# MVP Structure

The Minimum Viable Product (MVP) was designed to validate core functionalities and ensure a seamless experience for investors. The initial phase included:

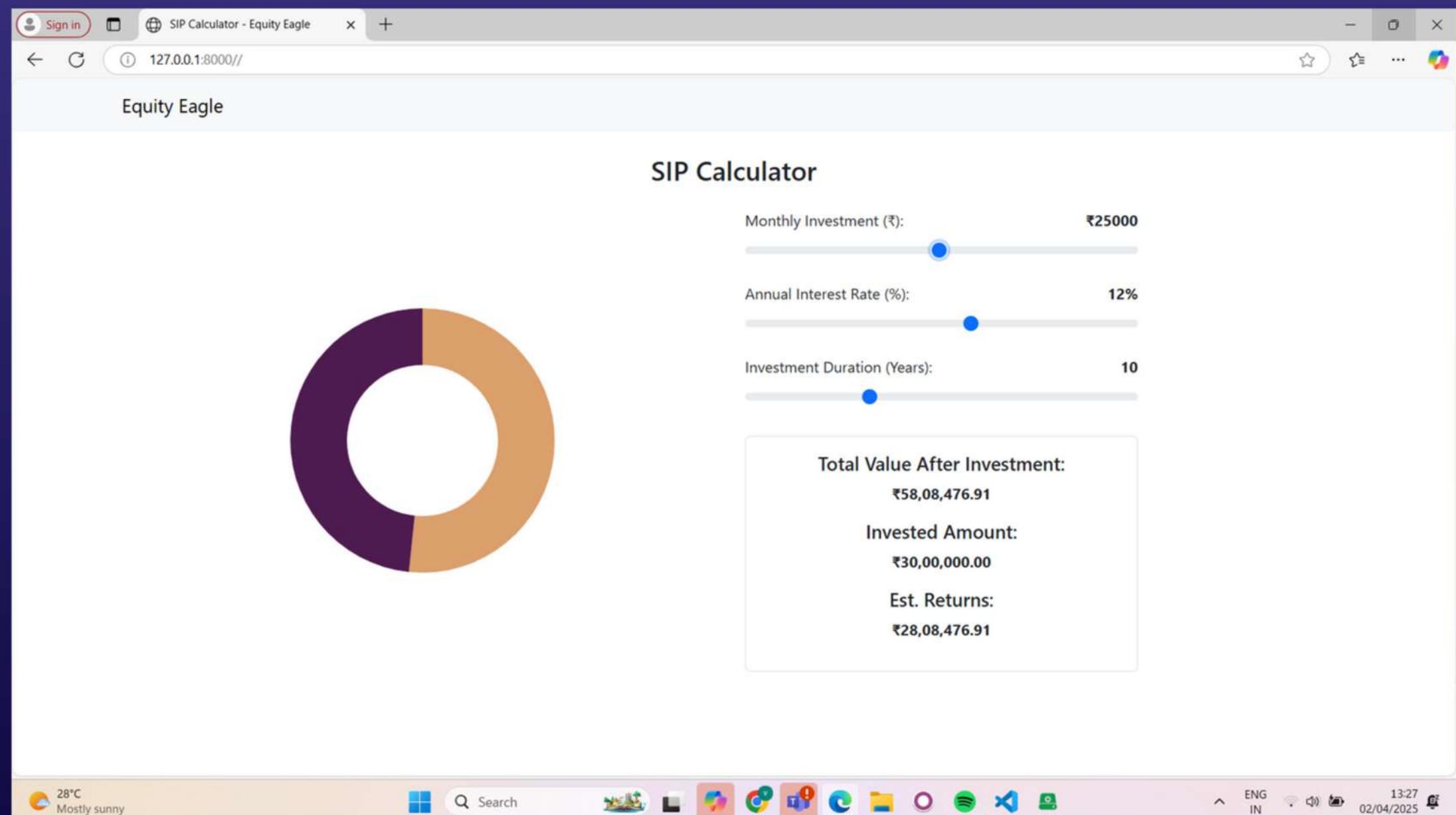
**SIP Calculator** – A structured tool for investment planning with a visual breakdown of returns.

**Stock Sentiment Analysis** – AI-driven insights to help investors understand market perception in real time.

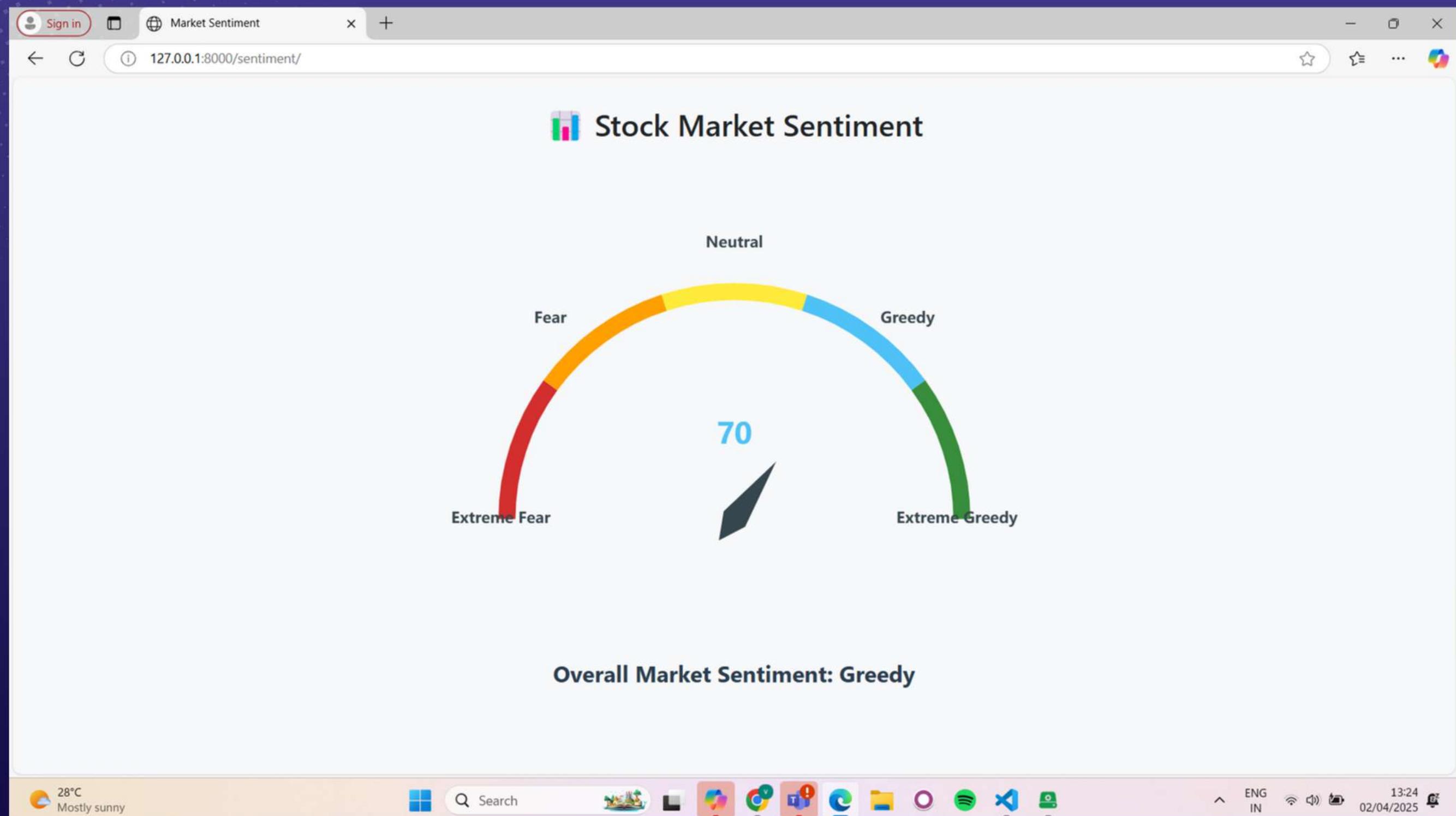
**Market News Aggregation** – A consolidated feed for financial news, ensuring users stay informed without switching platforms.

# Bringing the Vision to Life

With the blueprint in place, we transitioned to development, integrating essential functionalities while maintaining a clean and intuitive design. The SIP calculator, sentiment analysis, and market news sections were structured to provide a seamless user experience, ensuring quick access to relevant data. This phase was centered on balancing visual clarity with technical precision, setting the stage for future iterations.



# Sentiment - Screen



# News - Screen

Sign in Stock Market News 127.0.0.1:8000/news/ Stock Market News

## Stock Market News

UniFirst Corp has a consensus price target of \$187.25 based on the ratings of 4 analysts. The high is \$200 issued by Baird on October 24, 2024. The low is \$175 issued by JP Morgan on June 27, 2024. The 3 most-recent analyst ratings were released by UBS, UBS, and Baird on March 25, 2025, January 9, 2025, and October 24, 2024, respectively. With an average price target of \$209.67 between UBS, UBS, and Baird, there's an implied 19.13% upside for UniFirst Corp from these most-recent analyst ratings.

**Analyst Trends and Forecast**



Oct 24 Jan Mar

**Analyst Rating and Forecast**



1 2 3 4 5  
2.1 Sell

### Top Wall Street Forecasters Revamp UniFirst Price Expectations Ahead Of Q2 Earnings - Cintas (NASDAQ:CTAS) , UniFirst (NYSE:UNF)

UniFirst Corporation UNF will release its second-quarter financial results before the opening bell on Wednesday, April 2. Analysts expect the company to report quarterly earnings ...

[Read More](#)

Source: Benzinga | April 2, 2025, 6:56 a.m.



### UniFirst, BlackBerry And 3 Stocks To Watch Heading Into Wednesday - BlackBerry (NYSE:BB) , Ncino (NASDAQ:NCNO)

With U.S. stock futures trading lower this morning on Wednesday, some of the stocks that may grab investor focus today are as follows: Wall Street ...

[Read More](#)

Source: Benzinga | April 2, 2025, 6:48 a.m.

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# Key Metrics

Many investors struggle with scattered financial data, leading to delays in decision-making and missed opportunities. Equity Eagle streamlines insights, focusing on clarity, speed, and efficiency.

**User Adoption Rate** – Tracking how quickly users engage with core features (SIP Calculator, Sentiment Analysis, News Aggregation). Goal: 60-70% feature engagement within the first month.

**Comparative Efficiency** – Unlike free alternatives, our MVP integrates multiple tools into a single interface for seamless decision-making. Goal: Demonstrate that users prefer our streamlined workflow over switching between multiple apps.

**Retention & Repeat Usage** – Evaluating how often users return to the platform within a 30-day cycle.

Goal: Achieve a 40-50% user retention rate within the first two months, indicating strong value perception.

# Business Impact

**Revenue Growth Potential** – Our all-in-one platform creates monetization opportunities through premium insights, advanced tools, and future subscription models.

**Increased User Acquisition** – A streamlined investment workflow attracts a broader audience, expanding our user base faster than fragmented tools.

**Market Differentiation** – Unlike generic finance apps, Equity Eagle consolidates critical investment insights into a single decision-making hub, giving users an edge.

**Scalability Opportunities** – The integrated nature of our platform allows seamless expansion into AI-powered analysis, advanced chart recognition, and institutional-level insights, positioning us for long-term dominance.

# Scope & Future Growth

**Deeper Market Insights** – Advancing analytical capabilities by refining fundamental and technical analysis to offer richer, more actionable insights for investors.

**Mobile Expansion** – Launching a dedicated mobile app to ensure seamless access to market trends, alerts, and insights on the go.

**Strategic Alliances** – Partnering with financial platforms, brokers, and data providers to enhance decision-making capabilities and expand our user base.

**AI-Powered Insights** – Implementing machine learning models to deliver personalized investment recommendations and trend predictions, enhancing user decision-making.

# Conclusion

Equity Eagle's MVP lays the groundwork for a comprehensive investment ecosystem, streamlining sentiment analysis, fundamental insights, and chart pattern recognition into a single, user-friendly platform. Unlike fragmented competitor tools, our solution eliminates inefficiencies, allowing investors to make faster and more informed decisions.

Our strategic vision extends beyond the MVP, with a roadmap that includes advanced AI-driven insights, deeper fundamental analysis, and expert-led educational courses, reinforcing our position as a market leader in investment intelligence.

By combining data-driven decision-making, powerful analytics, and investor education, Equity Eagle is poised to become the go-to platform for both retail and professional investors, offering unparalleled value and long-term scalability. 