

/CASE STUDIES

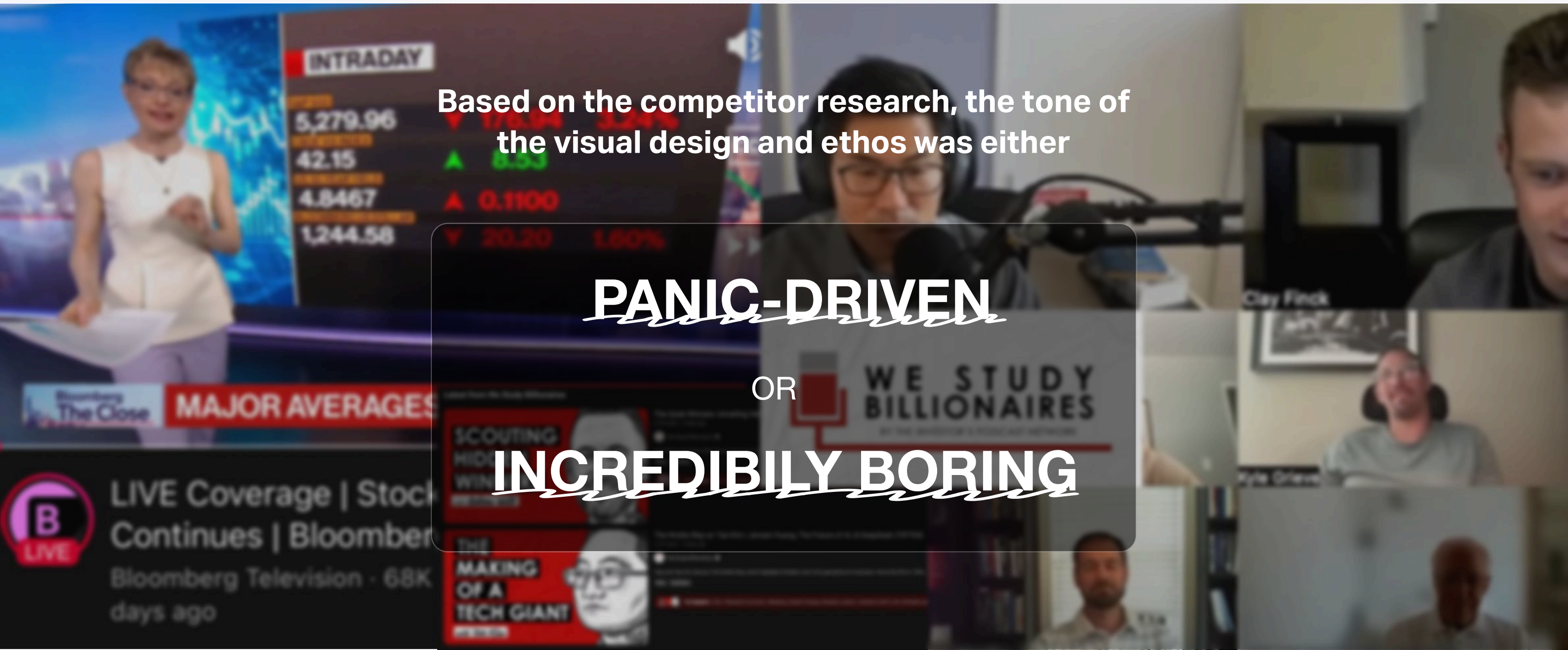
Bloomberg

Professional and Polished: Clean layouts, minimal clutter, corporate feel
 Modern Typography: Bold sans-serif fonts, often all-caps for headlines
 High Contrast Colors: Heavy use of black, white, and bright accent colours
 Data-Driven Graphics: Lots of charts, tickers, and infographics integrated visually

/CASE STUDIES

We Study Billionaires

Minimalist and Practical: Simple layouts focused on clarity
 Muted Color Palette: Whites, greys, soft blues—calm and non-flashy
 Typography for Readability: Clean serif or sans-serif fonts, not overly stylised
 Educational Tone: Charts or visuals are simplified and focused on explaining concepts



Based on the competitor research, the tone of the visual design and ethos was either

PANIC-DRIVEN

OR

INCREDIBLY BORING

The survey shows that **50% of the audience fears losing money** in investment, but why?

After the whitepaper research and survey, I came to deep into finding the topic what the podcast should discuss about according to the user's needs.

Key insights I found from secondary research:

Nearly 50% people are afraid of losing money and 36% people responded I don't know where to start.

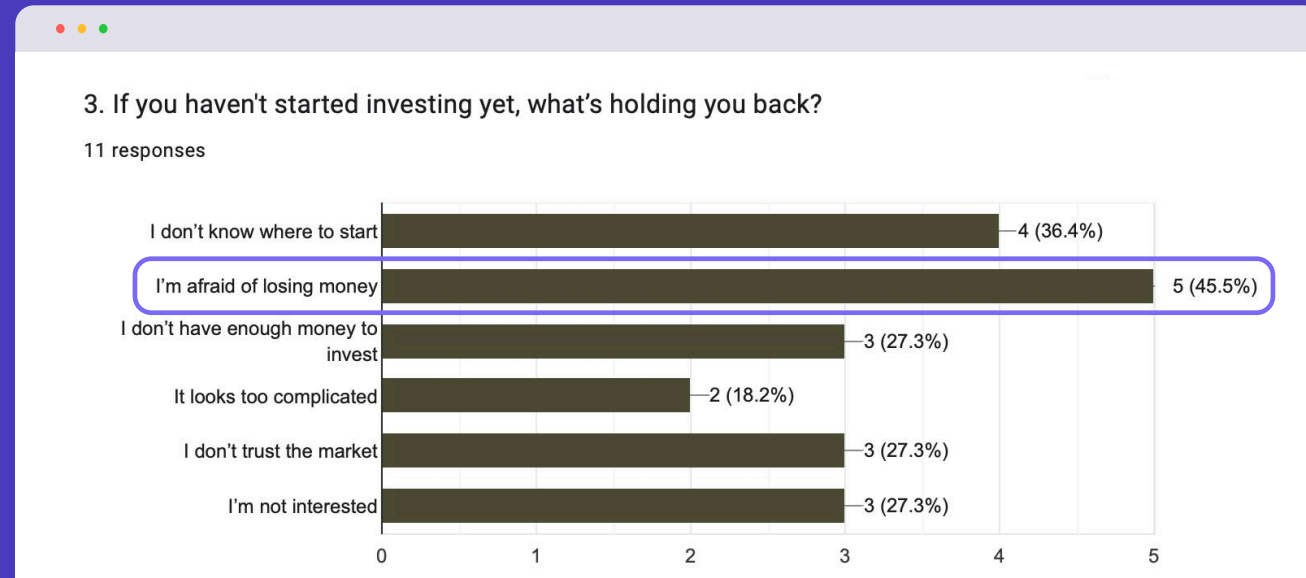
These data challenged me to think why this phenomenon arise and how should I make script according to this user experience.

The next challenge was:

- Why this fear runs even though there are plenty of investment information flooded about the market?
- How can we solve this FOMO?

The market is terrified by **the reckless policy decision** and there is a serious concern about a US recession

→ When **corporate are losing steam while inflation still high**, this is a very bad combo.



So, trump announced much worse than expected tariff especially for the Asian countries bc how he calculated it was let's say a bit "biased" towards export oriented such as JP, SK, Vietnam, Malaysia etc.

A lot of the goods that American consumers buy will soon see very big increase in prices, this will a few effects:1) lower the sales of some of the largest American companies (eg NIKE, which the stock was down 14% tdy) but also; 2) bring inflation into the economy (bc of price hikes by companies), which really make things very complicated

So the scenario mentioned above is almost certain to happen but the magnitude and the severity is still undecided bc lots of countries (especially the Asian countries) will likely to try to negotiate down the tariff; however it's a bit different for China and the EU, I feel like there's higher likelihood of retaliation

Voila

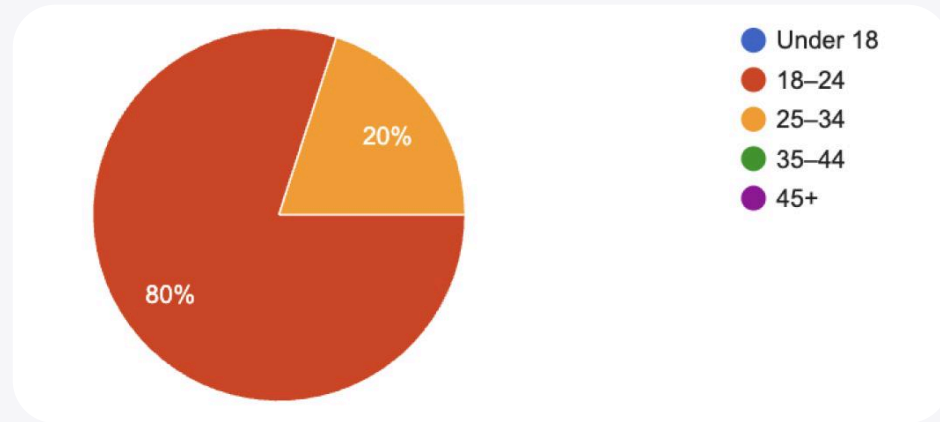
The key I guess is that market is terrified by the reckless policy decision and there is a serious concern (first time in a long time) about a US recession -> when corporate are losing steam while inflation still high, this is a very bad combo

But for ur investment, I think it can be very interesting to look at Gold, or buy some good companies that were heavily dumped today (or even some big tech, AI stories who got forgotten in the tariff war

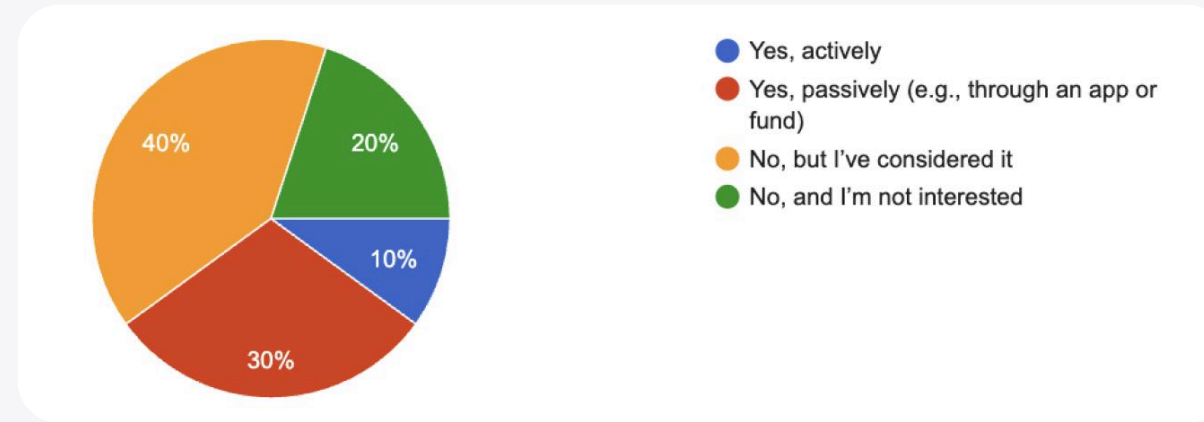
*This interview was conducted privately. In accordance with uk regulations, I'm unable to disclose personal details since the interviewee is currently employed at a global investment bank.

Defining Target Audience and Visual Language

AGE GROUP



STOCK INVESTMENT EXPERIENCE



Based on the coffee chat with RCA graduate UX researcher, I got insights to make the questions lists for survey and how the UX framework has to be proceeded.

To understand young investors and first-time stock traders, I created the Google Form survey and uploaded on Reddit and anonymous group chat to get to better know who is my potential user and how they feel about the stock market.

USER PERSONAS

Target Audience

Based on secondary research, the primary age group is 18–34, with a slight male skew (55% male, 45% female).

Visual Direction

I chose a gender-neutral, modern design to appeal broadly while maintaining inclusivity and approachability.

Tone & Purpose

The key visual emphasises casual, modern financial education, aiming to make stock investing feel less intimidating and more accessible.

Credibility Element

To reinforce trust and depth, I referenced insights from real stock equity researcher at an global investment bank as part of the film content inspiration.

- Age: 18 - 34
- Gender: Male or Female
- Occupation: Student or Young Professional
- Tech Savvys: Comfortable Using Technology

UX Design Thinking

UXD Research



Persona Provtotypes

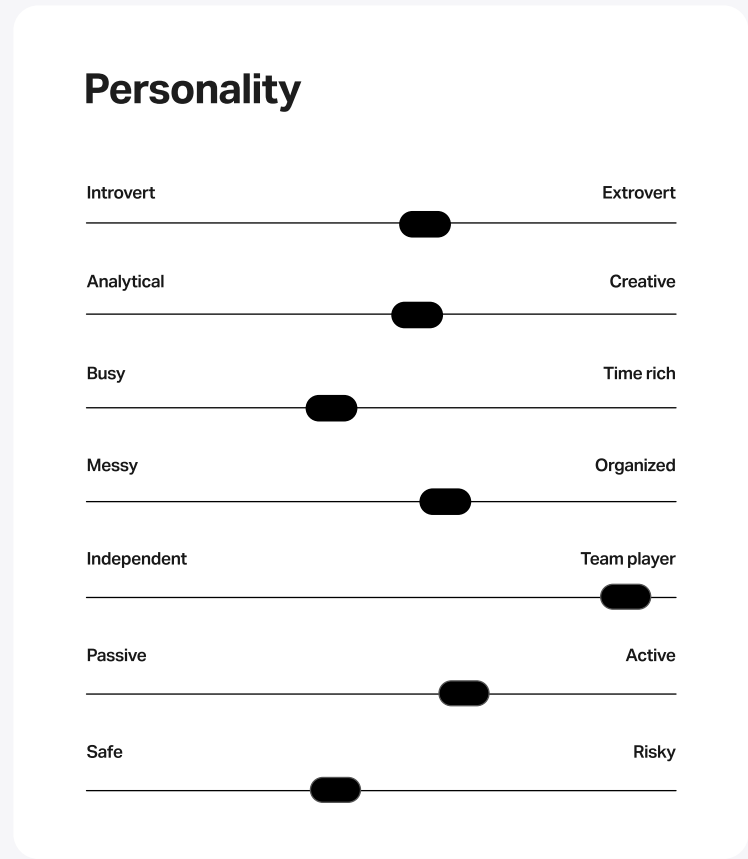


OJ

- 23 Male
- Architecture Designer
- Based in Southwest London
- Experience in cryptocurrency investment

Bio

I'm a recent graduate from the AA School of Architecture, currently working full-time at Zaha Hadid Architects. Over the past year, I ventured into cryptocurrency investing—initially seeing short-term gains, but ultimately experiencing a steep loss. That experience sparked both a cautious mindset and a deeper interest in understanding how to build lasting wealth. With a strong curiosity for stock investment and a drive to grow beyond fear, I'm joining the Alpha Mindset Series to develop smarter financial strategies and make confident, informed decisions with my pocket-sized capital.



This UX thinking process navigated me to develop my prototype and reflect objectively what can be achieved in the next iteration.

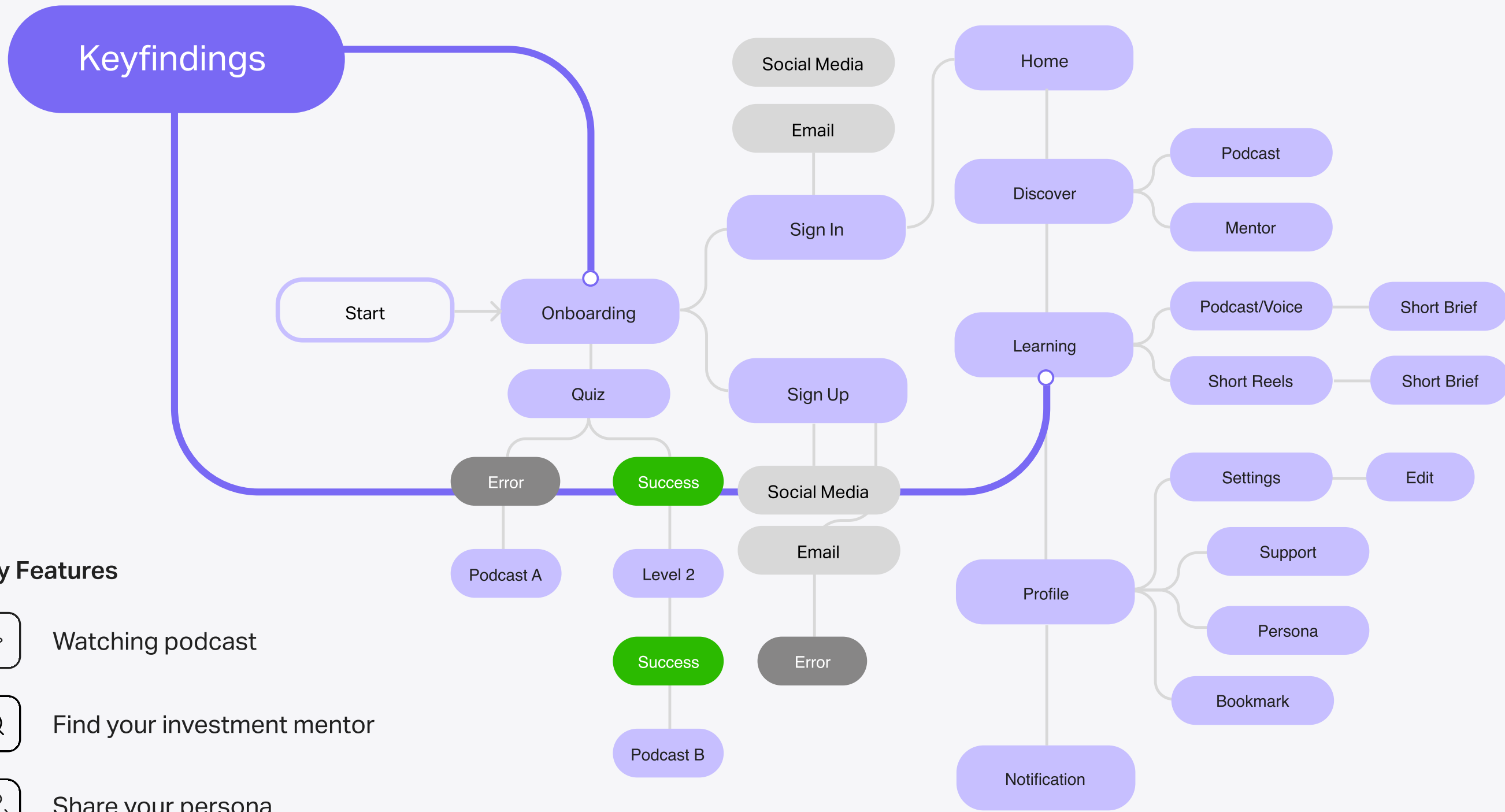
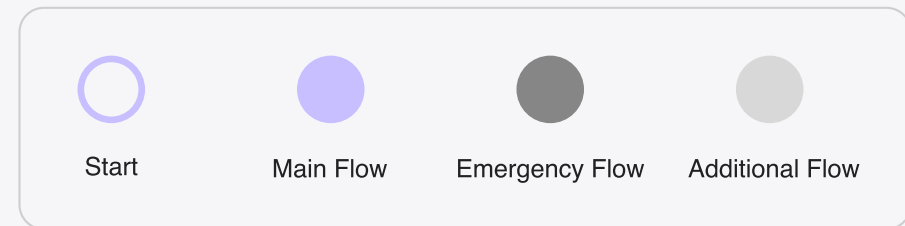
I checked each step in the order of UX design thinking. In order to delve into user behavioural analysis, I set the persona based on the target audience interview.

From this research, it sparked me to make a film content, regarding Stock vs Crypto.

Keyfindings to User Flow Map

Based on the financial literacy level, the podcast recommendation has to be bespoke for each investors/users.

*Onboarding quiz will be the solution to solve the insight

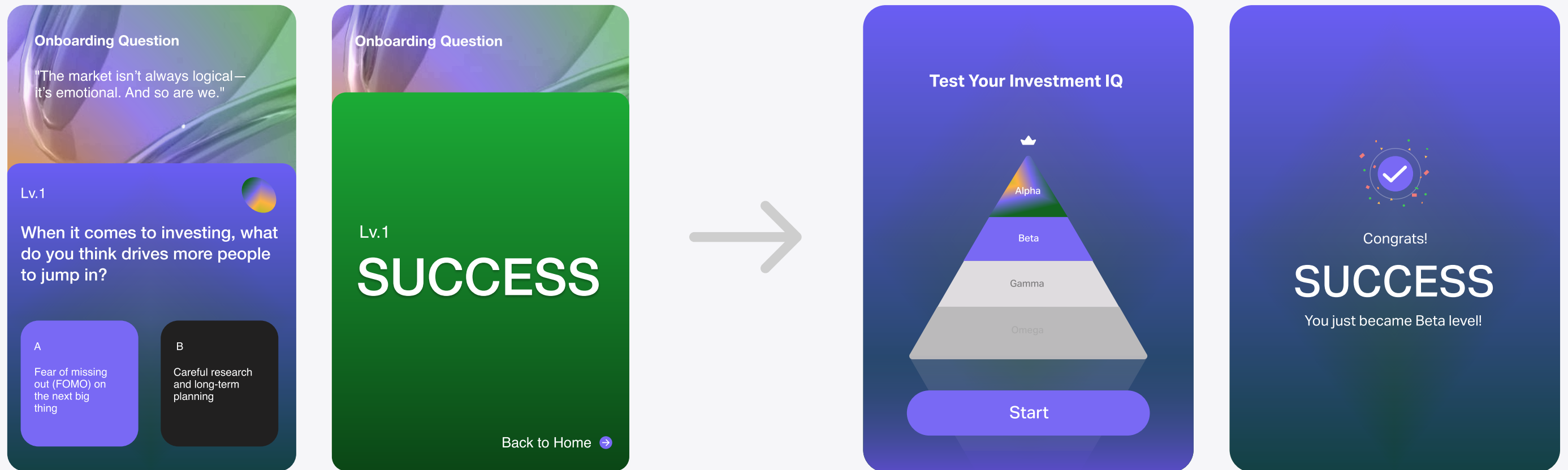


Key Features

- Watching podcast
- Find your investment mentor
- Share your persona

Discover your personalised investor profile with our bespoke quiz — designed to gauge your financial literacy

Visual Refinement



A/B Testing

After the A/B user testing, and to create visually captivating onboarding, I changed the quiz interface so that user can naturally follow the steps of gamification, according to these following steps:

Define the Level

To make the gamified levels in the quiz, I set the new hierarchy - Alpha, Beta, Gamma

Create the Start Button

Made the start CTA button to make user to start the quiz

Change Success Colour

From ordinary green success colour, I chose purple and dark gradients background to showcase less intimidating visual

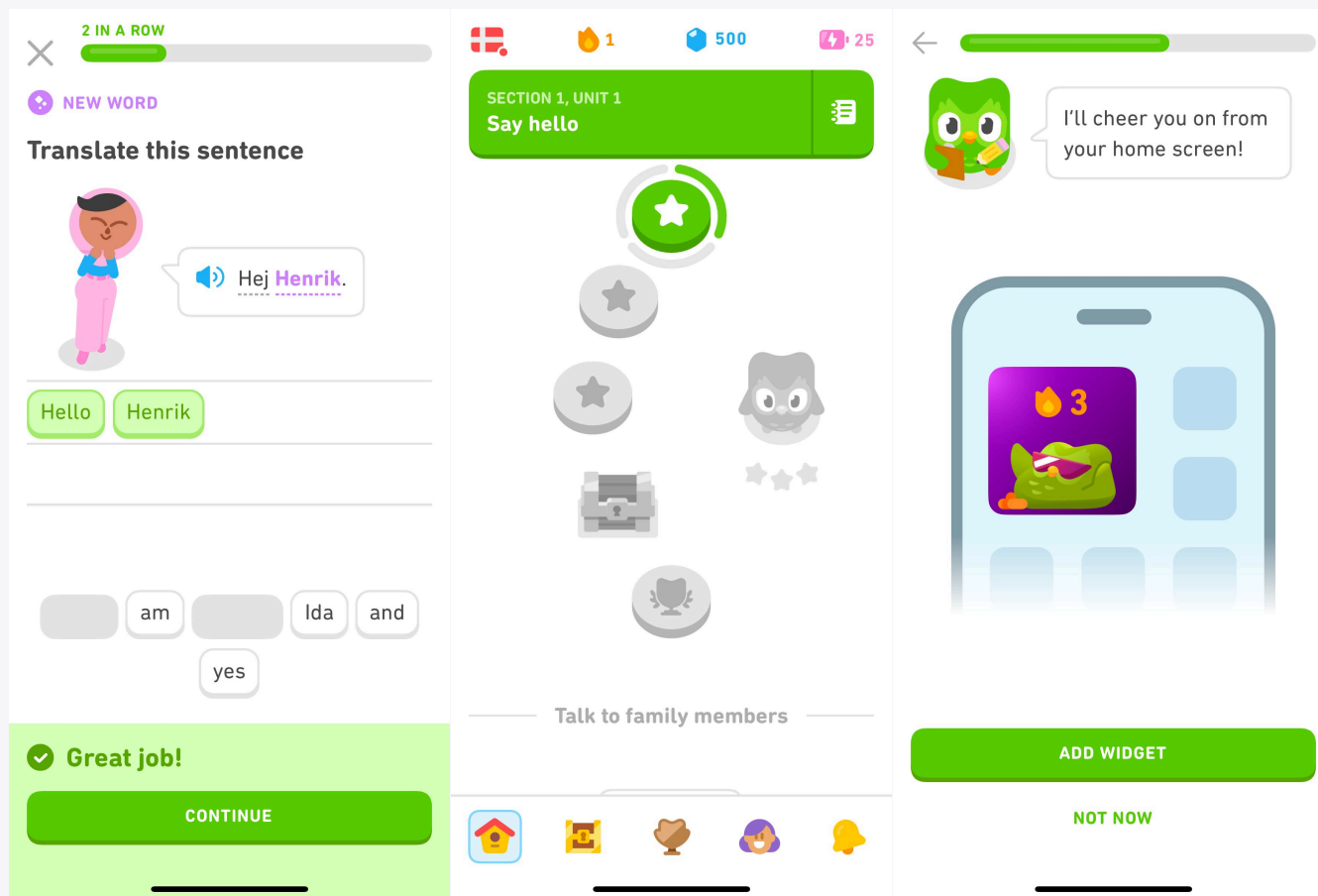
Wider Screen for Quiz

User can feel the full screen of the quiz so that the text would be more legible

How to Test and Evaluate Users Financial IQ

/CASE STUDIES

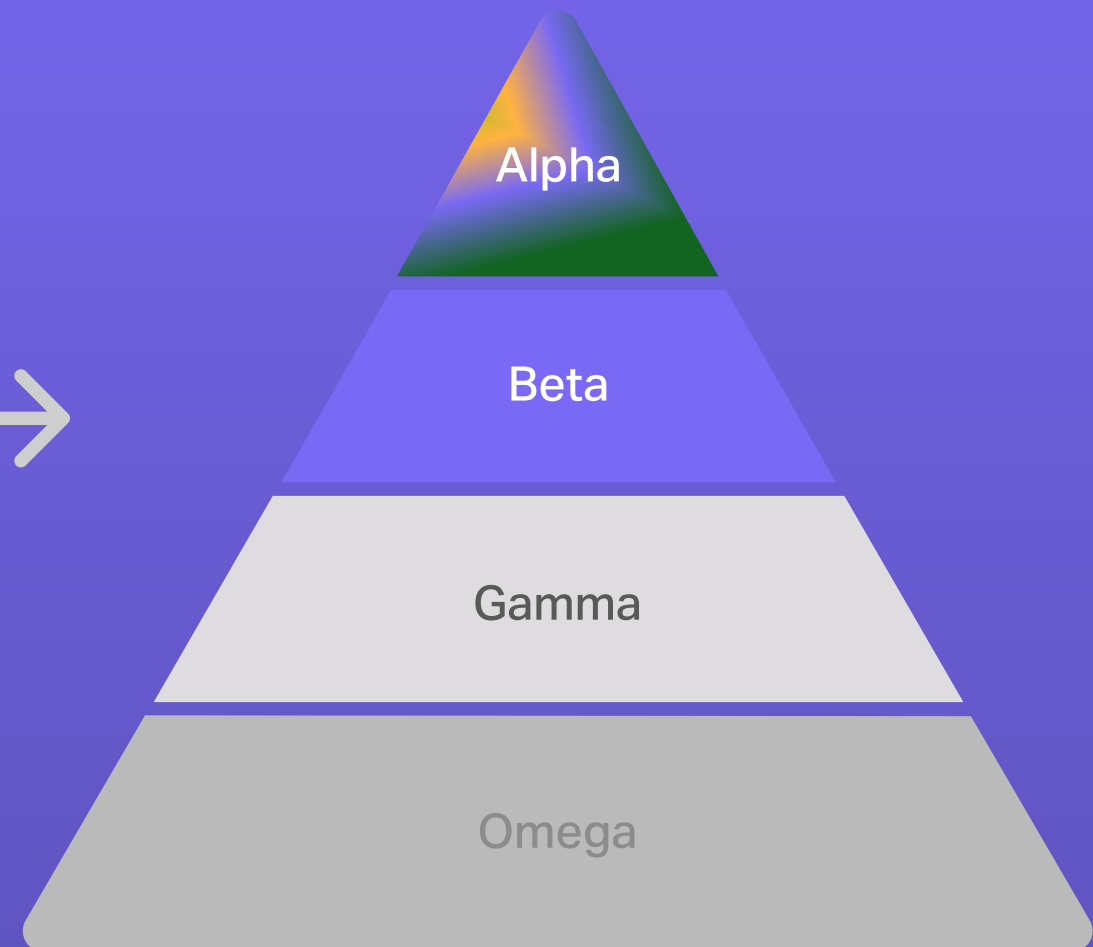
Duolingo



Why Duolingo's Bite-Sized, Gamified Learning Works

- **Micro-learning format:** Short lessons make it easy to stay consistent.
- **Gamification:** Points, streaks, levels, and badges create addictive motivation loops.
- **Personalised onboarding:** Tailors lessons based on user goals and experience.

Hierarchy System in Gamification



Why Use Hierarchy System in Gamification

- **Adds a sense of progression:** Users feel like they're leveling up as they learn.
- **Taps into status psychology:** Titles like "Alpha" feel rewarding and aspirational.
- **Makes learning fun:** Turns financial literacy into a game, not a test.