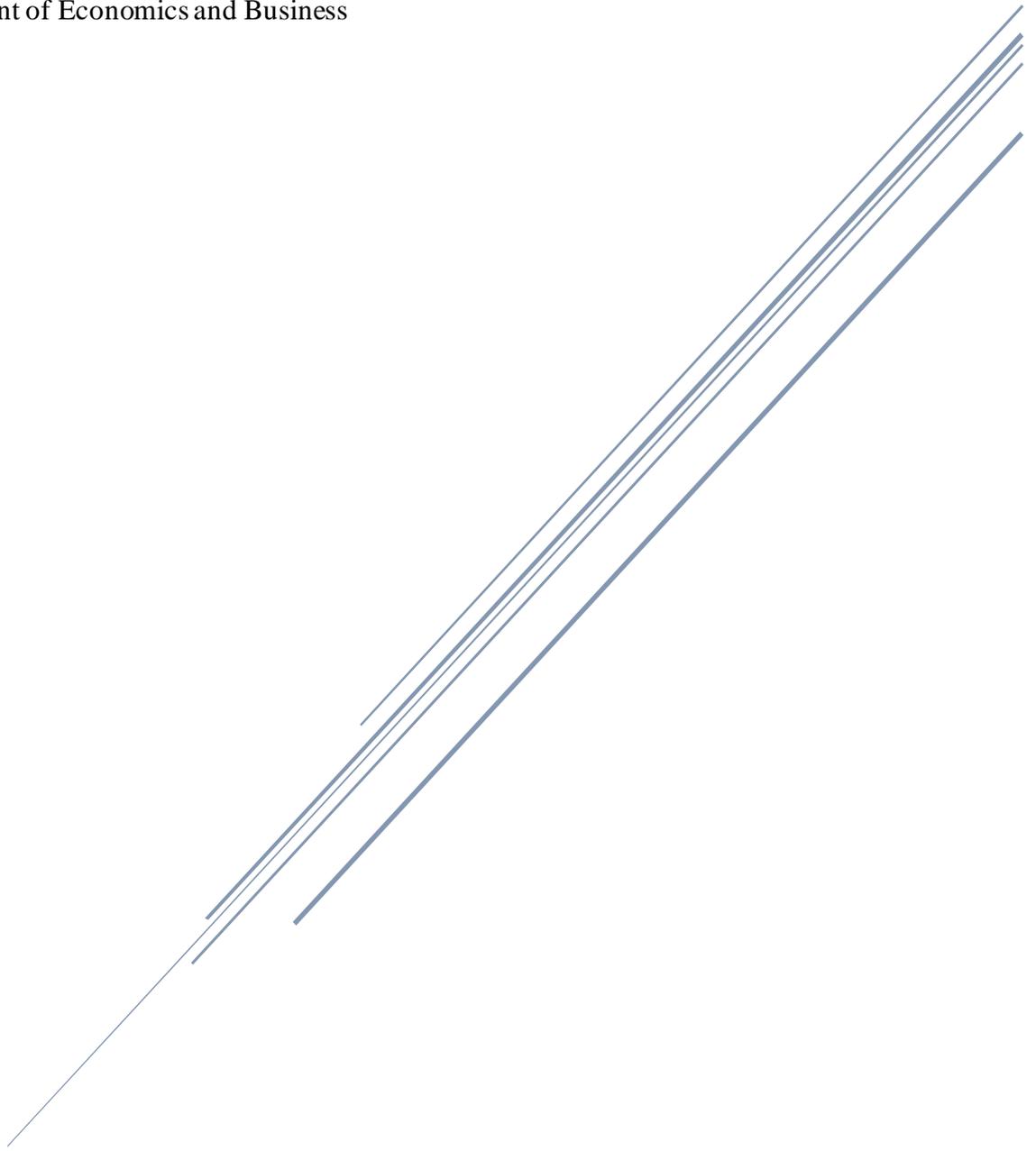


ANALYSIS OF A TRADING/ INVESTING EDUCATIONAL TOOL

Capstone Project Summary

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I. Executive Summary

This Capstone project evaluates nine educational platforms according to a methodology and gives it a score out of five stars.

The nine platforms are:

1. Knightsbridge Trading Academy
2. The Perfect Portfolio
3. Tradenet
4. Traders' Academy
5. Investors Underground
6. Tradepro Academy
7. Warrior Trading
8. Bullish Bears
9. Bear Bull Traders

Its final output is an article reviewing Bullish Bears, to be uploaded in BrokerChooser's website.

II. Benefits to the Client

BrokerChooser focuses on service provider selection. Per feedback, 70% of their customers are beginner traders, some of whom are not yet familiar with educational trading portals when they start using brokers' tools. The majority of these beginner traders learn trading in the web and turn to educational platforms to start or further their trading knowledge. The high-level journey of their customers is comprised of the following steps:

1. Learn about trading
2. Select investment vehicle (e.g., stocks, assets)
3. Select broker
4. Trade

Currently, BrokerChooser is focused on broker selection. Since gaining trading knowledge is a key part of their customers' journey, it might be beneficial for BrokerChooser to expand their scope. In this Capstone project, we establish a methodology, assess a number of educational platforms, and focus on one platform of which to write an in-depth review.

III. Key Outcomes

1. Summaries

These are overviews of the nine educational platforms, including their rating. It includes the founders, the focus of the courses, key points, and any special advantages or disadvantages.

2. Excel file with Methodology

The assessments and computations are done in an Excel file. Below are the main sections on which the platforms are evaluated. (Each section is divided further into subsections.)

Criteria	Weight
Pricing	20%
Way to Learn	10%
Platform Quality	17%
Covered Contents	15%
Quality of Contents	14%
Reputation	14%
Extra Services	5%
Miscellaneous	5%

The Excel file contains three main tabs.

a) Input sheet

The “Input sheet” tab is where the sections and subsections are laid out. You select “TRUE”, “FALSE”, or for some cases, “MID-RANGE”, accordingly. There are some fields to be manually filled up (e.g., Average Price, Partner Brokers).

b) Calculation sheet

The “Calculation sheet” tab transforms the answers in the “Input sheet” tab into scores. It makes use of the Excel formulas (e.g., Index, Match, and Vlookup) to get the values from the other sheets and calculate the scores accordingly.

c) Map tables

The “Map tables” tab contains the sources of the scoring. It includes the tables assigning the values (e.g., 0%, 100%) to the entries in the “Input sheet” tab (e.g., TRUE).

3. *Review Article*

The final output is an article reviewing Bullish Bears, the educational platform which scored the highest. The structure of the article is as follows:

1. “About Us” of the educational platform
2. One-sentence recommendation
3. Pros and Cons
4. Discussion of each section in the methodology
 - a. Title
 - b. Number of stars
 - c. One-liner overview
 - d. Discussion proper
 - e. Screenshots
 - f. Comparison with other platforms
5. Bottom Line

IV. Learning Experience

Working on this Capstone project was an educational and enjoyable experience. It included data gathering (getting the information about the platforms), data compilation (having the Excel file reflect and score the data gathered), and decision making (answering subjective criteria, assigning weights to sections), among others. As a bonus, you also got to learn some trading lessons – or overviews, at least. However, my favorite part was writing the article: deciding which are relevant information and how to best compile them, visiting BrokerChooser’s website and ascertaining the “pattern” with which they present their reviews, and finally, constructing the article accordingly.