

STOCKR

A Social Medium for the Stock Market

Investors' use of online & social resources:

90M

people seek stock information and guidance online monthly¹

70M

personal online brokerage accounts worldwide²

1.5M

retail trades made online every day³

70%

of retail investors get trading ideas from their personal network¹

1. Board of Governors of the Federal Reserve System, "2007 Survey of Consumer Finances"
2. Tower Group, Morgan Stanley
3. Sanford Bernstein

People everywhere have tradable information



“Lots of rain + sunshine this year, wheat crops looking as good as 2003.”



“Reading NEJM – Pfizer’s cancer drug will be too toxic for FDA approval”



“Can’t keep Lululemon products in stock – sold out everywhere!”



“Dell 10Q: inventories are 4% higher than last quarter. Buying July puts.”



“Toyotas coming into my auto shop with brake pad problems again.”

**But there’s nowhere to credibly
share it with fellow investors**



The Problem: Investing is a social activity without a good social platform

Investing sites' social tools and communities are primitive



Social sites are not used – by people or by companies – to discuss stocks

No site provides market data and modern social tools


Meet Stockr

Search

STOCKR^{BETA}





1




News Feed


Company Pulse




**Viny Jindal**


Tim Symington, nice post on [Apple Inc.](#) I don't see how this stock doesn't get back to \$700 this year. They'll only make more inroads in the enterprise space, and in my opinion, the iPad mini has more potential than the original iPad. Add in a call option on Apple TV and a solid base business, there's more upside than downside here.

18 minutes ago | 0 |  Andrew Pevsner likes this.

**Craig Coblenz**

Does anyone else think [LinkedIn Corporation](#) has become a SPAM machine? I get multiple emails a day from them, most of which are trying to sell me to a higher paid account based on the fact that I can see users who viewed my profile. I would actually use LinkedIn more if there was less transparency on that front. Why do I want people seeing when i view their profile? Agree or disagree? Viny Jindal, Tim Arbuckle

9 hours ago | 4 | 

**james jago:** I completely agree with your sentiment regarding transparency. I now tiptoe around as viewing other people's profiles is similar to a "poke".


8 hours ago

Watchlist

AAPL Apple Inc.	\$525.00 -2.00 (-0.38%)
ACAD ACADIA Pharmaceuticals Inc.	\$4.85 -0.10 (-2.02%)
AMGN Amgen Inc.	\$88.48 -0.50 (-0.56%)
AMZN Amazon.com Inc.	\$269.26 +10.11 (+3.90%)
BA The Boeing Company	\$76.20 -1.49 (-1.92%)
BAC Bank of America Corporation	\$12.10 +0.00 (-0.04%)
BMJ Bristol-Myers Squibb Company	\$33.44 +0.10 (+0.28%)

feedback & support

Stockr unlocks this unique information by providing a modern social platform specifically for investors

**Viny Jindal:** i agree with Craig on this. a certain amount of anonymity is necessary in a social venue for people to operate freely. imagine you're at a party or a conference, and any time you look at someone even casually, they are notified by email. everyone would keep to themselves, defeating the point of bringing everyone together. too much transparency can be bad for a social site....

CVX
Chevron Corporation

DE

\$109.64
-0.86 (-0.78%)

\$88.74

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Chat (3)

Experts emerge and share their thoughts.


Members benefit.


**Lynn Hoggan**
Facebook Inc. continues its climb... it's the stock to own at cocktail parties... What better reason to own a stock :)
a day ago | 3 | ☆


**Craig Coblenz:** FB was definitely all the rage at cocktail parties pre IPO but after the volatility in the stock during the months post IPO most of the party goers are still trying to catch their breath. That said, if investors have stomached the ride this long, and didn't sell for a loss along the way, I think they should feel good about 2013 and beyond now that the street (and therefore retail investors) are judging FB on company fundamentals instead of on hype or hearsay. THIS IS JUST MY OPINION. What do you think Michael Pachter, Vinny Jindal?
9 hours ago


**Lynn Hoggan:** Generally I agree... Actually I sold my FB today @29.60 for a 11% gain... Lots of momentum behind FB. I'm a swing trader so I have been in and out of FB twice in the last 30 days... With 600,000 (GOING TO 1 Trillion hahaha) users / CUSTOMERS it will double its 31 Dec 2012 close (45 to 50)... Are you a buyer of FB?
6 hours ago


**Vinny Jindal:** in my humble opinion, there's a lot of positivity in Facebook Inc. at \$30. my bet is that it sees \$25 before \$35. Tim Symington, any thoughts?
an hour ago

**Francisco Diaz-Mitoma**
Zynga Inc. on the rise
12 days ago | 3 | ☆

**Andrew Pevsner:** Nice trade so far, Francisco. Up over 20% already?
12 days ago

**Phil Boscarino:** What's moving this? Up over 17% this week!
12 days ago

**Francisco Diaz-Mitoma:** I'm holding until they disclose the effectiveness of real money gaming with their Bwin partnership.
12 days ago

Add a comment...

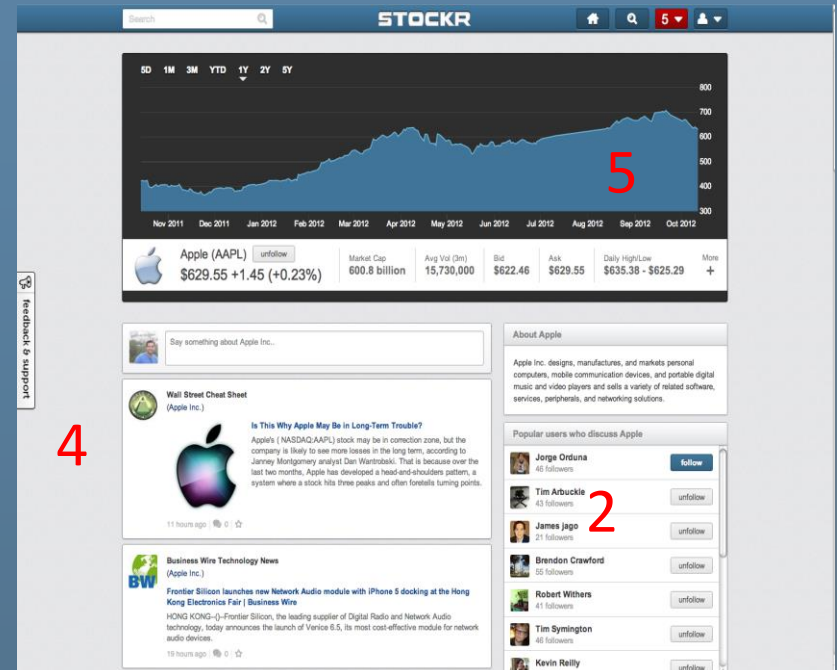
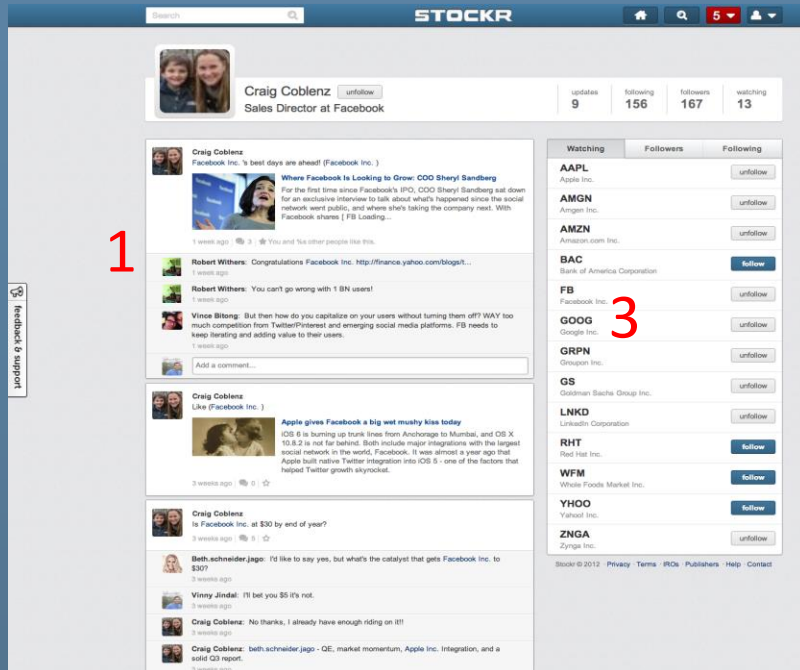
Craig Coblenz

Retired Sales Director at Facebook
on \$FB

Francisco Diaz-Mitoma

Founder of Titan Gaming
on \$ZNGA

Stockr: “A Bloomberg for the masses”



1. **Newsfeed** – real-time updates from people, publications & companies you follow
2. **Follow Recommendations** – discover relevant investors and companies
3. **Watchlist** – 5-minute delayed quotes on companies from your curated list
4. **Customized Market News** – from 900+ sources, tagged by public company
5. **Chart and Company Fundamentals** – the standard data points investors look for

In the words of others...



“One of 4 financial technologies reinventing finance from LA, not NY” *Tim Lloyd*



“Stockr is entering the market at the right time – a time in which more options are needed. The financial social media space may still be in its infancy, but it’s heading in the right direction.” *Tom Johansmeyer*



“Whereas Yahoo! Finance gives a quick, static snap shot with little way to directly communicate with other (often anonymous) users and message boards are relics from the 1990s, the Stockr platform is an in-depth, real-time, more sophisticated deep dive.” *Lori Kozlowski*



“Stockr lets users create a watchlist of their favorite stocks, get feeds of news about the companies that they’re interested in, and follow the comments of users that they’ve chosen to follow. But the big differentiator is its use of social commenting, which ties their contributions to their identity.” *Ryan Lawler*

How We Monetize

A silhouette of an oil pumpjack is positioned on the left side of the frame. The pumpjack's long, angled arm extends towards the center, with a counterweight and a hanging rod visible. The background is a dramatic sky at sunset or sunrise, with the sun as a bright orange orb partially obscured by the pumpjack's structure. The sky is filled with wispy, light-colored clouds that catch the low light of the sun. The overall color palette is dominated by oranges, yellows, and blues.

“Data is the new oil.”

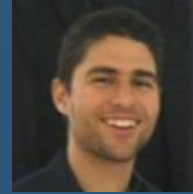
-Andrea Weigend ([Chief Scientist at Amazon](#))

Our Goal: Building the Investor Graph



Francisco Diaz-Mitoma
Founder at Titan Gaming, Inc.

- Follows 7 **Consumer** stocks
- Follows 8 Technology stocks
- Follows 4 **Gaming** stocks
- Follows 3 Small-Caps
- Follows 3 Mid-Caps
- Follows 6 Big-Caps



Mardo Iknadiossian
President of UCSB Investment Club

- Follows 5 **Consumer** stocks
- Follows 2 Utilities stocks
- Follows 1 **Gaming** stocks
- Follows 2 Small-Caps
- Follows 4 Mid-Caps
- Follows 6 Big-Caps

Facebook & Google make \$B collecting consumer/behavioral data

Stockr is uniquely positioned to collect investor/behavioral data

Revenue Model 1: Access Specific Investors

Risk Profile

Invests in Industrials

Invests in Telecommunications

Invests in Consumer Services

Invests in Consumer Goods

Portfolio Diversity

Invests in Large Cap Companies

Active Traders Only

Owns Companies:

Performance

Companies target Stockr users based on investing interests

Long Only Traders

Invests in Small Cap Companies

Invests in Utilities

Invests in Financials

Invests in Technology

Portfolio Concentration

Invests in Funds

Invests in Consumer Services

Buy And Hold Traders

Invests in Mid Cap Companies

Invests in Micro Cap Companies

Invests in Health Care

Revenue Model 2: Pay-to-Follow



Dr. Velveth Schmitz

Follow: \$20/month

Cardiovascular Surgeon, UCLA

updates
108

following
198

followers
2987

companies
23

The “unused capacity” model applied to information –
disrupting a \$25 billion industry

- Professionals worldwide have insights into companies and industries
- Investors pay top dollar for differentiated, high-value information
- Investment newsletters of dubious quality generate > \$1 billion
- Everyone likes making more money

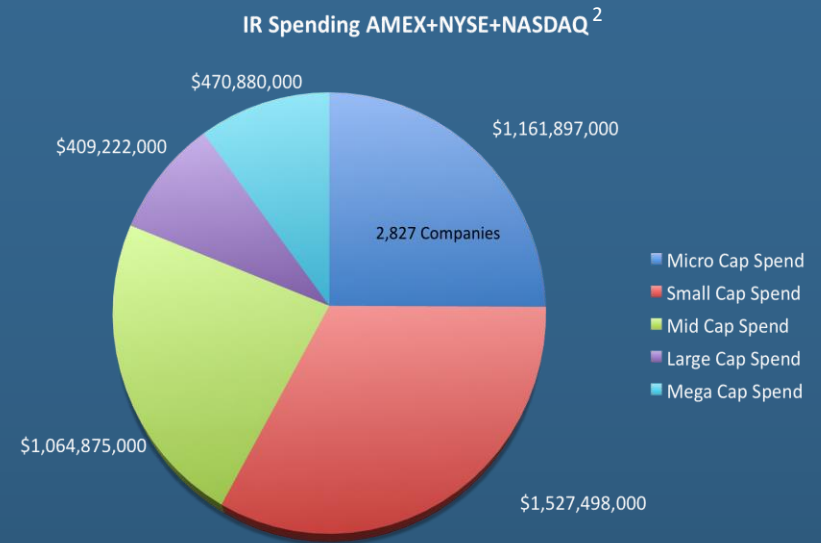
Stockr will take a 30% cut of all payments

Revenue Model 3: Investor Relations

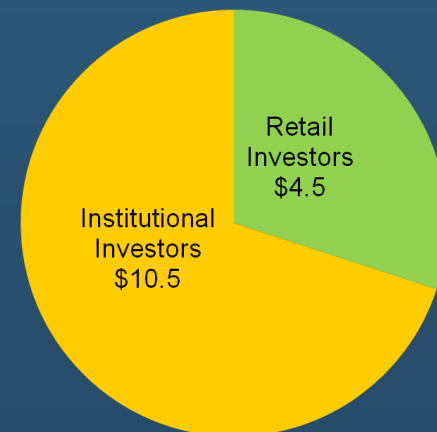
Over \$6 billion spent annually on IR, nearly all towards institutional investors

IR groups can take over their Stockr page to:

- ✓ Engage current/future shareholders
- ✓ See what the market is saying and thinking about the company's stock
- ✓ Target users whose interests dovetail with the company's profile



Market Value of Stocks Held (\$ trillion)¹



1. Board of Governors of the Federal Reserve System, "2007 Survey of Consumer Finances"

2. National Investor Relations Institute (NIRI) Annual Report, 2011

Status: Traction and Monetization

Traction: Content & User Growth

Financial publishers like Investor's Business Daily and Motley Fool have begun recognizing Stockr for its unique content, which they are harvesting for articles. This drives user growth and creates a positive feedback loop of content and users.

The logo for Investor's Business Daily, featuring the text "INVESTOR'S BUSINESS DAILY" in white on a dark blue background.

"Four companies Apple should buy and one it shouldn't"

#1 Article at Investors.com on April 8th, 2013

Monetization: Investor Relations

April 2nd, 2013: SEC Approves Use of Social Media For IR

- Since, 12 companies on-boarded
- Includes CBS (Fortune 100) and 11 small-cap clients each paying \$500 per month.
- Accomplished without a sales staff and no marketing budget.
- The company is now projecting profitability this year.

Status: Previous Funding and Current Round

Raised Angel Round of \$1.7M

Investors Include:

- Bill Harris, CEO of Personal Capital, former CEO of PayPal and Intuit
- Adam Townsend, EVP & Head of IR at CBS, former Head of IR at E*Trade
- M. Scott Havens, President of The Atlantic Media Group

Raising a \$1M Series A

Use of Capital:

- Scale operations and development of a sales force targeting Investor Relations Officers and IR agencies
- Accelerate technical product roadmap to fully support demand
 - Outbound content federation
 - Automatic disclosure integration
 - IR Dashboard(see next slide for full roadmap)

Growth Path

Product Development

2013

Outbound content API
Trending/Recent
LinkedIn Connect
IR dashboard
Company data
Pay-to-follow

2014

Yodlee/Intuit Integration
In-Stream Trading
Targeted Adv Platform
Stockr App Store
Proprietary Pay-to-Follow

2015

Peer-to-Peer Stock Exchange
The “Stockr 100” Mutual Fund
Crowdfunding Marketplace
Enterprise Product
Myriad Uses of Aggregated Data

Team Growth

Product

Product Manager
Mobile Designer
Web App Designer

Engineers

Python/Django Devs
Front-End Dev
Data Scientist
Mobile Engineer

Business

Investor Relations Outreach
Publishers Relationship Mgr.
E-Brokerage Relationship Mgr.
Chief Financial Officer
Support Staff

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