

Olive Invest Case Study: Launching Predictive Analytics for Smarter Stock Investing

Client: Olive Invest

Role: UX Strategy Lead / Product Design

Focus: Predictive analytics platform for retail investors

Industry: Fintech

Overview

Olive Invest, a digital investment platform for retail investors, set out to launch a new **predictive analytics tool** that would demystify the stock market using AI-driven insights. The goal was to provide users with **clear, confidence-building data** on market trends and stock performance—without overwhelming them with technical jargon or data overload.

As UX Strategy Lead, I translated a sophisticated analytics engine into a **user-friendly, trust-building interface** that empowered everyday investors to make smarter, data-backed decisions.

The Challenge

- **Complex data:** Predictive models included volatility forecasting, sentiment analysis, and option flow data.
 - **Diverse user base:** Ranged from beginner investors to semi-experienced traders.
 - **Trust barrier:** Users needed to feel confident in recommendations without feeling manipulated or confused.
 - **Regulatory awareness:** All UX decisions had to comply with financial disclosure and compliance guidelines.
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Objectives

1. Simplify complex stock predictions into **digestible, visual insights**.
2. Create a UX framework that supports **progressive disclosure**—users see what they need, when they need it.
3. Build trust through transparency, explainability, and **AI confidence indicators**.
4. Launch with a scalable **design system** that could support future AI tool expansion.

Approach

User Research & Personas

- Conducted interviews with retail investors via Olive’s existing community and onboarding flow.
- Mapped emotional journey from curiosity → confidence → action.
- Identified user pain points: info overload, lack of clarity in “signals,” decision anxiety.

Experience Strategy

- Introduced “**Insight Cards**” that break down predictions into visual, actionable summaries.
- Designed **Confidence Scores** and “Why this signal?” links for explainability.
- Created **Investment Personas** that adjust interface depth based on user behavior (Beginner, Intermediate, Expert).
- Integrated **educational overlays** to explain terms like “volatility delta” and “AI momentum bands.”

UX & Visual Design

- Created low- to high-fidelity wireframes, working in Figma using an updated Olive design system.
- Visualized forecasts using dynamic charts, light gamification, and micro-interactions.
- Implemented dark mode and accessibility compliance (WCAG 2.1) for inclusive UX.

Launch & Feedback Loop

- Launched to a closed beta group of 1,000 users.
- Integrated with Olive’s notification system to alert users of market shifts.
- Collected usage data and ran weekly A/B tests on confidence visualization and CTA placement.

Results

- **User Engagement:** +43% increase in platform engagement post-launch
- **Conversion:** 21% lift in trial-to-paid conversions attributed to AI insights
- **Time on Site:** +18% average session duration
- **Trust Score:** User-reported trust in predictions increased by 37% in follow-up surveys
- **Scalability:** Insight Cards framework reused in subsequent product modules (crypto, ETF, ESG investing)

Key Takeaways

- When introducing AI and predictive analytics to non-experts, **clarity > cleverness**.
- Trust is earned through **transparency, explainability, and education**—not just charts and confidence bars.
- A flexible UX system with progressive disclosure enables wide adoption without alienating users.

Next Steps

- Exploring voice integration for insight narration
- Building an “Ask AI” feature for portfolio questions
- Extending analytics to emerging asset classes (e.g., crypto, real estate, global equities)

Tools Used: Figma · Maze · Amplitude · GA4 · Notion · Slack · FigJam

Team: Product Manager, AI Engineer, Compliance Lead, Visual Designer, Front-End Devs