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**MOBILE INVESTING HABITS REVEALED**



**E\*TRADE®**

MOBILE INVESTING IS ABOUT MORE THAN  
**STOCK QUOTES  
& MONITORING**

*New insights paint a rich mosaic of how different investors use their smartphones*

**NEW YORK, December 3, 2014** — E\*TRADE Financial Corporation (NASDAQ: ETFC) today released insights on mobile investing from the most recent wave of *StreetWise*, E\*TRADE's quarterly tracking study of experienced investors. The following insights pertain to smartphones — not tablets.

When managing personal finances, experienced investors most commonly use their smartphone to check stock quotes – the top selection at 38 percent. The second most common mobile activity is monitoring their investments, at 32 percent, which stands to reason as 55 percent of experienced investors check in on their portfolio once a week or more.

In peering below the surface, however, a more nuanced picture of the mobile investor emerges:

- When looking at age, investors under the age of 34 are almost twice as likely as the total population to use their smartphone to watch educational videos on investing (14 percent vs. 8 percent).
- When delineating by age and gender, male investors under the age of 34 are intensely engaged with their orders, with 61 percent saying they use their smartphone to check on order status — far more than any other activity
- Meanwhile females under the age of 30 are the most likely to use their smartphone to research investment products, at 44 percent.

- When looking at regions, while investors in the Bay Area are most likely to use their smartphone to monitor their portfolio (41 percent), Northeasterners are some of the most likely investors to check the market (36 percent).
- E\*TRADE customers are very mobile-engaged, ranking as some of the most prolific mobile users for checking the market (37 percent), reading news about potential investments (23 percent) and watching educational videos (13 percent).

“Mobile investing is not a uniform activity — it means different things to different people,” said John Matos, who oversees digital channels at E\*TRADE Financial. “This is because the life of an investor is not static — on one hand, their investing and trading needs evolve as they enter different life stages. On the other hand, different generations are adapting to new technologies in new ways. Mobile investing today is about so much more than placing trades.”

With respect to the future of mobile investing, Matos offered the following insights:

- Service will grow more collaborative. Mobile will enable greater interaction between service reps and customers, e.g., investors will be able to screen share with reps through their smartphone in order to get a helping hand.
- Investors will not need a phone to keep a watchful eye. They will simply check their wearable technologies (for instance, smart watches) to review their portfolio or get stock quotes.
- Experiences will blend. Platforms, tools, sites and devices are integrating rapidly. Accordingly, the native app will no longer be thought of as a distinct experience, but as one part of a unified experience with their provider — from desktop to tablet to smartphone.

E\*TRADE offers intuitive, hassle-free and seamless digital platforms backed by professional guidance. E\*TRADE’s mobile offerings include investing applications for popular devices, including iPhone®, iPad®, Android™ Phone and Tablet, Windows® Phone, and Kindle Fire Tablet and Amazon Fire Phone. Investors and traders use [E\\*TRADE mobile](#) apps to manage their accounts on the go, place stock, option, ETF and mutual fund trades, as well as access real-time quotes, news, charts and educational content anywhere.

For useful insight from E\*TRADE and third-party investment professionals, follow the Company on Twitter, [@ETRADE](#).

### **About E\*TRADE Financial**

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**About the Survey**

This wave of the survey was conducted from Sept. 29 to Oct. 6 of 2014 among an online U.S. sample of 925 self-directed active investors who manage at least \$10,000 in an online brokerage account. The survey has a margin of error of  $\pm 3.6$  percent at the 95 percent confidence level. It was fielded and administered by ResearchNow. The panel is 65 percent male and 35 percent female with an even distribution across online brokerages, geographic regions and age bands.

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