

Ally Invest

Trade Ticket Re-Design

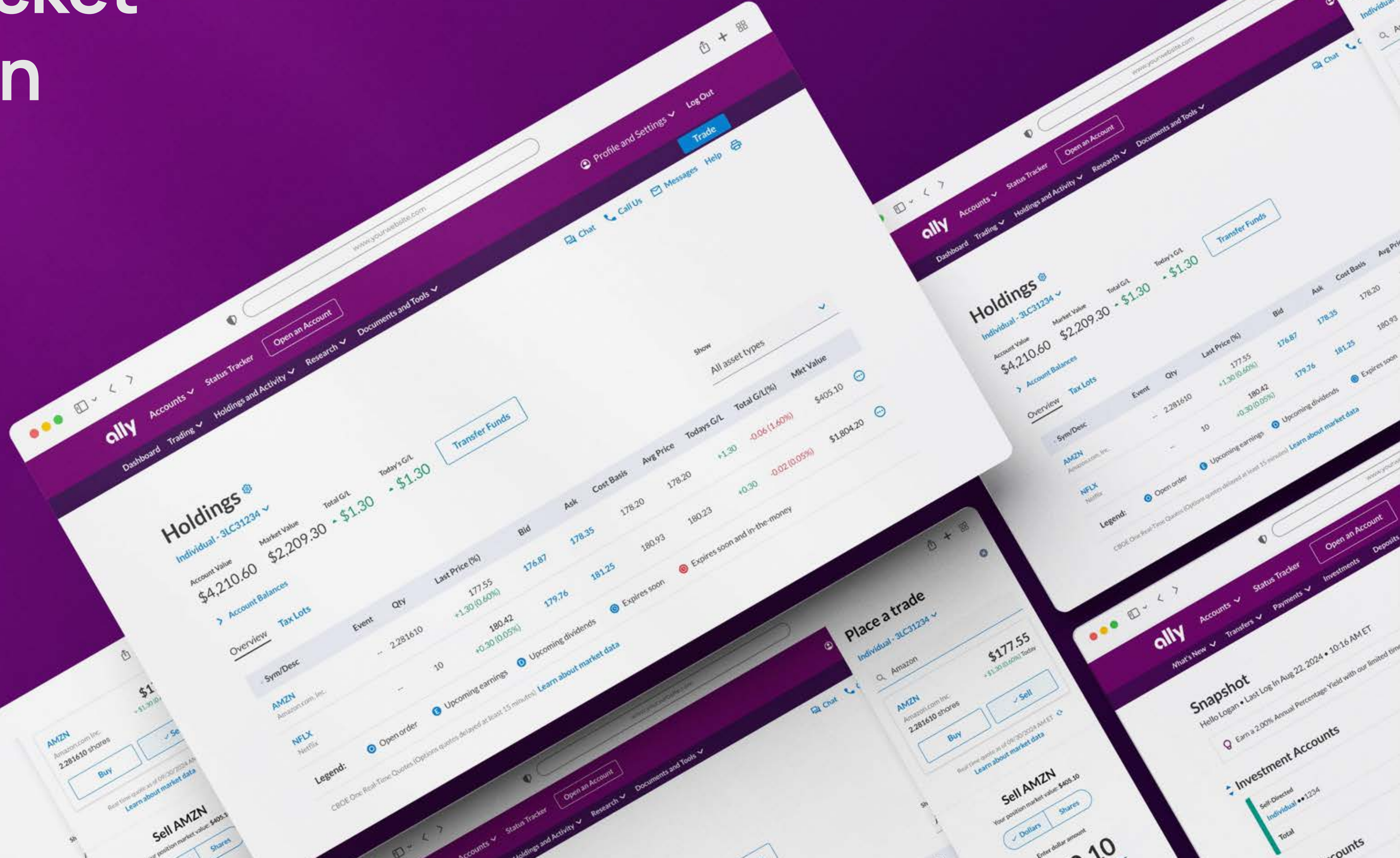


Trade Ticket Redesign

PROJECT TYPE

UX + UI Design

Web and Mobile Web



Problem To Solve

More Trade Features

Don't have the ability to trade in dollars or do Fractional trading.

No Parity

Lack of mobile and web parity, specially around buying power terminology.

Complex experience

The trading experience is very complex and overwhelming for a novice investor.

Our Primary Goals



Build User Trust

Use real-time feedback to make users feel in control and informed. Lower confusion and support calls.



Streamlined Trade Ticket

Combine all trade actions into one easy-to-use entry point.



Support Fractional Trading

Let users buy small amounts of stock in a simple, understandable way.



Simplify for New Investors

Create a beginner-friendly experience that builds confidence and trust.

HMW

How might we simplify the trading experience to support newer investors without sacrificing core functionality?

How might we introduce fractional trading in a way that feels approachable and valuable to all investors?

How might we streamline the trade ticket so users can take action from a single, intuitive entry point?

Start of the experience is **HOLDINGS**

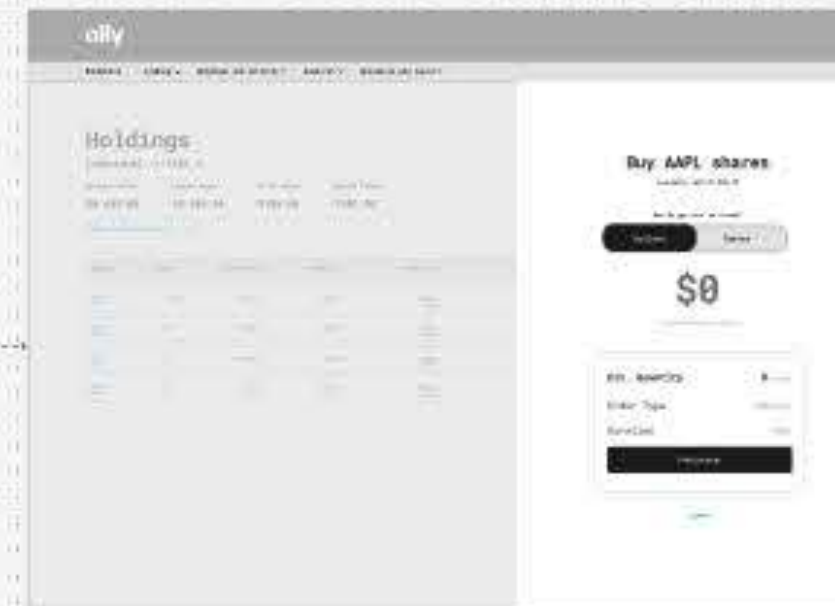
Holdings -- Simple Version



Holdings -- Advance Version



Buy panel -- Dollars



Buy panel -- Shares



Order Preview



Shares



Success Trade Message

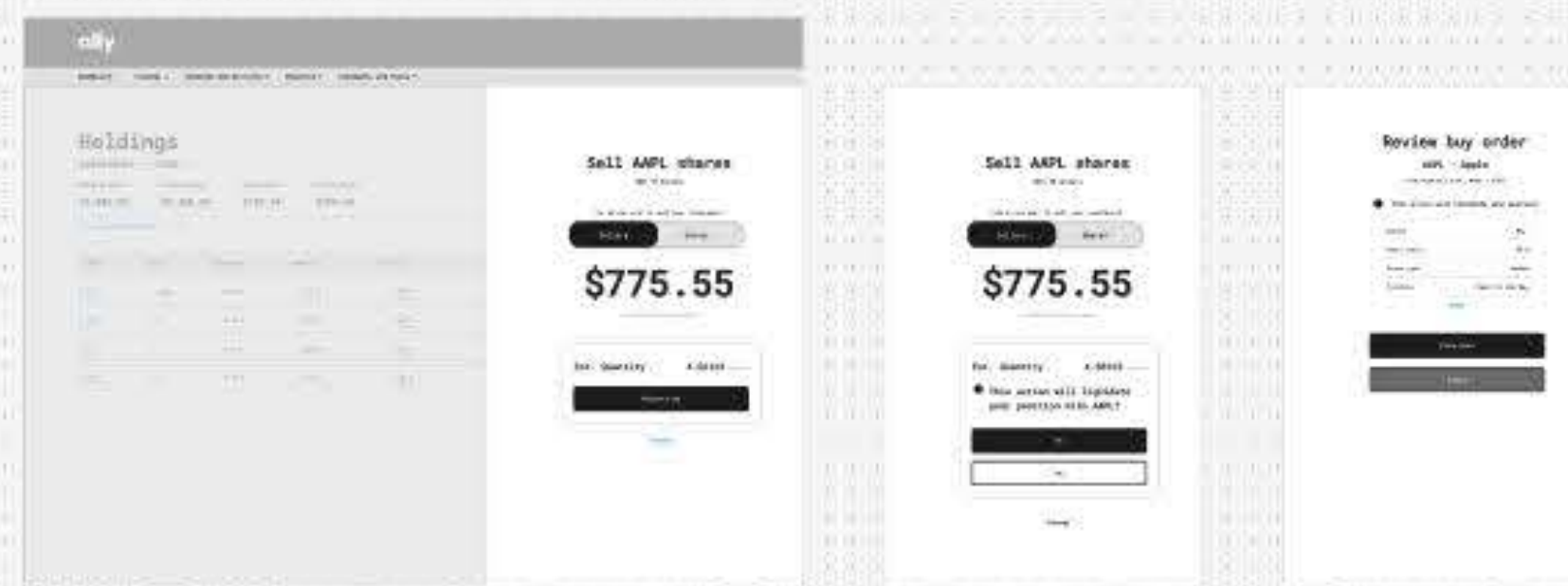
Sell panel -- Dollars



Sell panel -- Shares



Sell Liquidation of shares



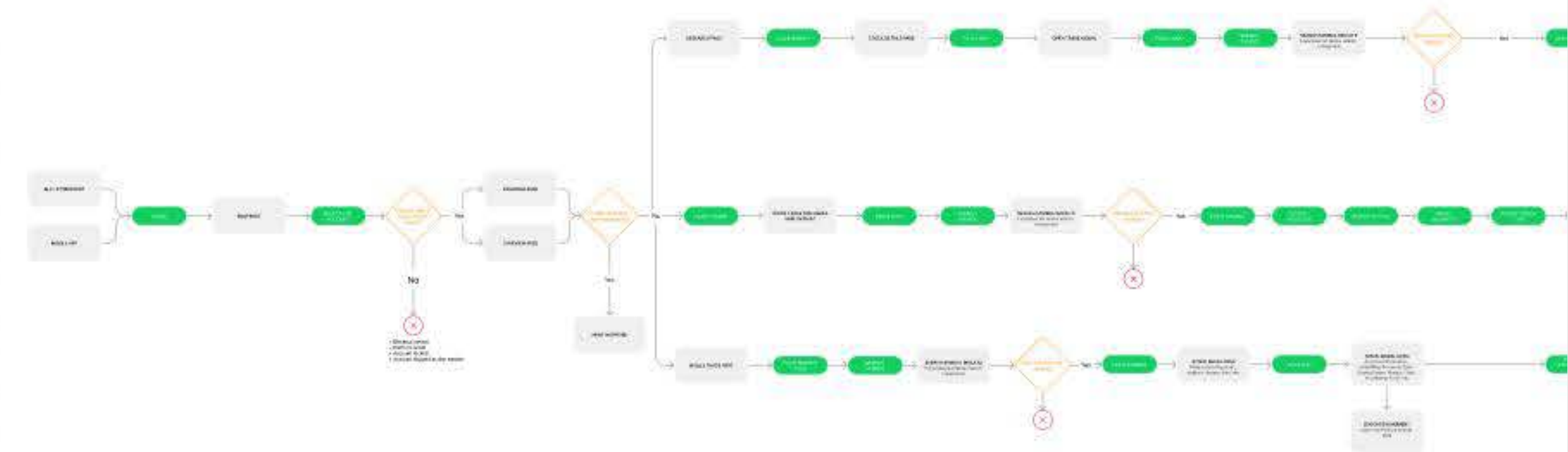
Flows

The integration of various trading features into a single, dynamic trading panel offers investors a streamlined experience. This panel provides clear and concise information, empowering users to make informed trading decisions and execute trades with greater confidence and ease.

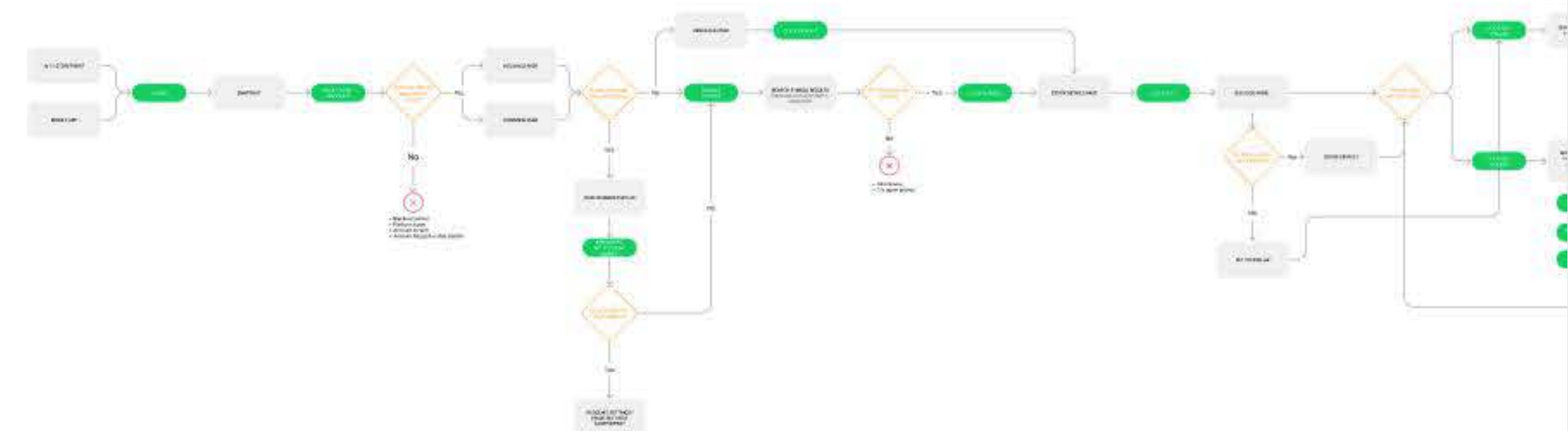
UX requirements

- Easy-to-Find Trade Entry Point
- Consolidated Trade Panel
- Streamlined Trade Flow
- Clear Confirmation Feedback
- Fractional Share Support
- Beginner-Friendly Language
- Real-Time Information

Current State User Flow



Future State User Flow



New Trading Panel

- Update UI patterns and Accessibility standard for a more consistent and modern look.
- Reduced number of data point and fields necessary for basic trading actions.
- Improved focus on quantity and primary actions

×

Place a trade

Individual - 3LC31234 ▾

Q Amazon

AMZN

Amazon.com Inc.

0.281610 shares

\$177.55

+ \$1.30 (0.60%) Today

✓ Buy

Sell

Real time quote as of 09/30/2024 AM ET ↺
[Learn about market data](#)

Buy AMZN

✓ Dollars Shares

Enter amount

\$0

Place a trade

Individual - 3LC31234

Q

Amazon

AMZN

Amazon.com Inc.

\$177.55

+ \$1.30 (0.60%) Day

Real time quote as of 09/30/2024 AM ET
[Learn about market data](#)

Buy AMZN

Dollars

✓ Shares

Quantity

0

Order type

Choose one

?

Available to trade

\$2,000.00

Estimated total

\$0.00

Preview Order

Clear

Apply for Options trading.

Place a trade

Individual - 3LC31234

Q

Amazon

AMZN

Amazon.com Inc.

\$177.55

+ \$1.30 (0.60%) Day

Real time quote as of 09/30/2024 AM ET
[Learn about market data](#)

Buy AMZN

Dollars

✓ Shares

Quantity

2

Order type

Choose one

?

Available to trade

\$2,000.00

Estimated total

\$0.00

Preview Order

Clear

Apply for Options trading.

Order preview

You're about to place an order in your
Individual - 3LC31234.

Buying

AMZN

Amazon.com, Inc.

\$177.55

+ 1.30 (0.60%)

NYSE x 100

Market info

?

Bid

\$176.87 NYSE x 1

Ask

\$178.35 NYSE x 1

Volume

15.47 M

Real time quote as of 09/30/2024 AM ET
[Learn about market data](#)

Quantity	2 Shares
Order type	Market
Duration	Good for Day
Estimated fee	\$0.00
Estimated comision	\$0.00
Estimated total	\$355.10

Place Order

Edit

Cancel

Order placed

Individual - 3LC31234



You placed an order to
Buy 2 shares of AMZN
for an estimated total of \$355.10

It may take up to a few minutes to see it in
your open orders.

Go to Dashboard

Place a New Trade

Order Status

Place a trade

Individual - 3LC31234

Amazon

AMZN

Amazon.com Inc.

0.281610 shares

\$177.55

+ \$1.30 (0.60%) Today

Buy

Sell

Real time quote as of 09/30/2024 AM ET

Learn about market data

Buy AMZN

Dollars

Shares

Enter amount

\$0

Buy AMZN

Dollars

Shares

Quantity

2

Order type

Market

Available to trade

\$1,951.30

Estimated total

\$355.10

Preview Order

Clear

Apply for Options trading.

Selling

AMZN

Amazon.com, Inc.

\$177.55

+ 1.30 (0.60%)

Market info

Bid

\$176.87 x 1

Ask

\$178.35 x 1

Volume

15.47 M

Real time quote as of 09/30/2024 AM ET

Learn about market data

Quantity

1 Shares

Order type

Market

Duration

Good for Day

Estimated fee

\$0.00

Estimated commission

\$0.00

Estimated credit

\$177.55

Edit

Cancel