

**My
Design
Stuff**

Case study

JPMorgan Traders Dashboard

Traders Dashboard

JPMorgan Traders Dashboard

Visual Design, UX, UI

Working with existing data and tools used by bond traders. Our team designed an application that better-interpreted data, thus making it more useful. At the same time creating a centralized customizable dashboard that gives the trader, smarter information empowering them to make better and more timely trade decisions.

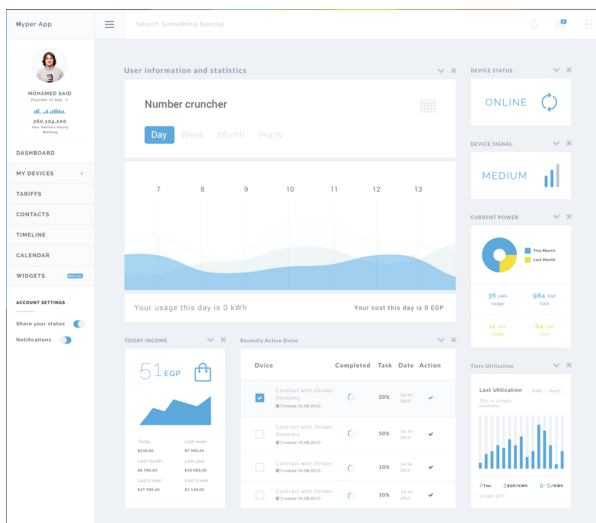
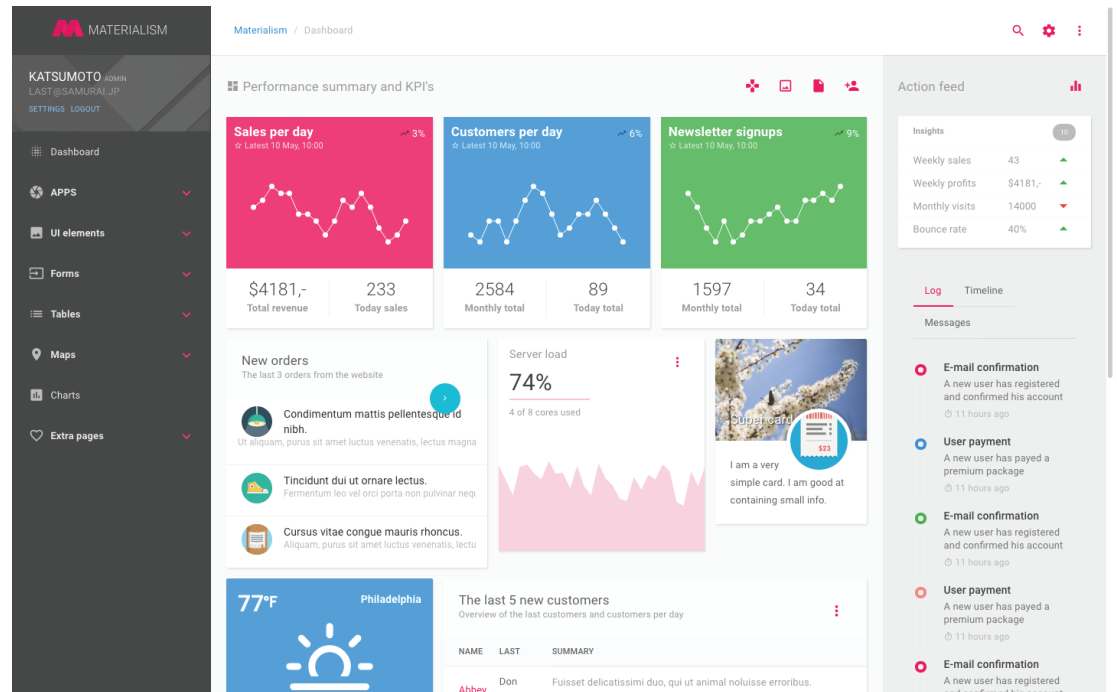
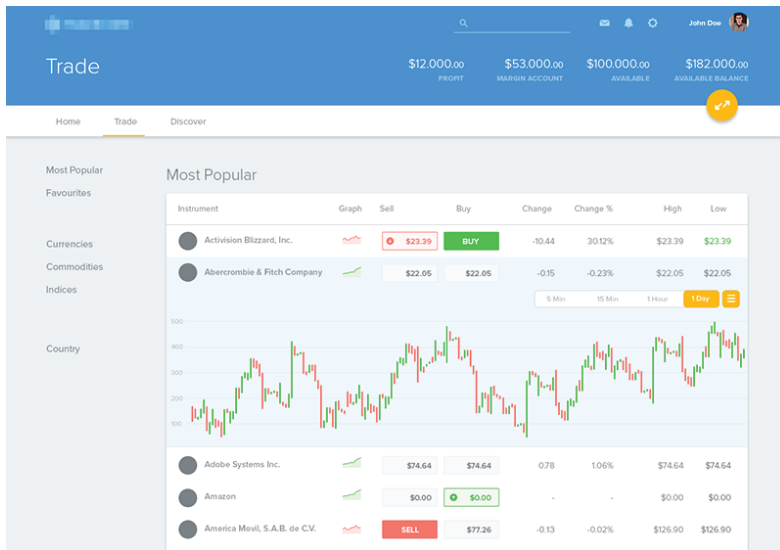
Primarily my role was the visual designer, working within the JPMorgan brand and two dashboard modes (Night and Day). Leading the UI effort in envisioning how this new dashboard of tools would look and feel.

To understand the pain-points of the trader we shadowed and interviewed the traders, in addition to critical stakeholders. We also had lengthy discussions with data scientists to interpret the meaning of different datasets.

After that, we delivered an extensive brand brief including the strategy of the platform and how the widgets of the customizable dashboard worked together and independently. I also created a design specification document which I walked through the developers.

Dashboard exploration

Going into this project I always knew it would not be possible to really expand the visual identity in terms of the colors used. But, I wanted to expand the visual utilitarian design system. especially from a framework lens, what are the interaction patterns and UI elements that go with it.



Dashboard framework

Here is a breakdown of the components that make up the dashboard.

TRADER DASHBOARD

SEARCH

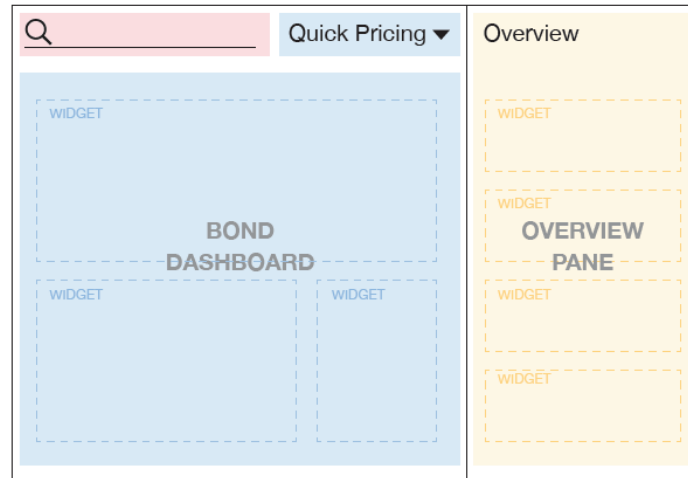
for a bond to load into the Bond Dashboard

ANALYZE

bonds using widgets in the Bond Dashboard

MONITOR

current market activity using the Overview Pane



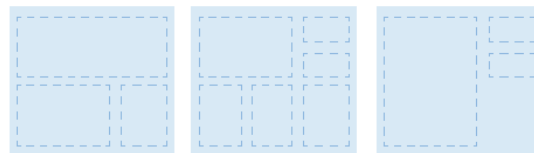
Search

- Look up specific bonds
- Quickly navigate using recent history

Q Kellogg			
🕒	K	7.450	04/01/2031
🕒	K	4.450	05/30/2016
	K	4.000	12/15/2020
	K	4.150	11/15/2019
	K	3.250	05/21/2018

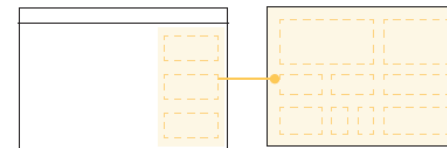
Bond Dashboard

- A collection of flexible widgets providing data and insights around a single bond
- Access different dashboard templates to apply to the same bond in focus through the dashboard picker (currently showing the Quick Pricing dashboard).



Overview Pane

- A collection of widgets tracking activity outside the scope of the bond in focus (overall market activity, sector activity, etc.)
- Monitor the ongoings of the market, the client base, or other factors affecting the trader role
- Pop out the pane into a separate window for a more detailed view



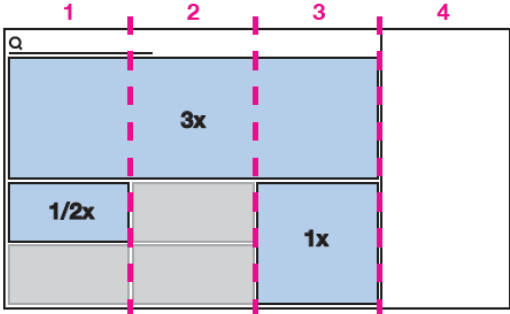
Widget framework

What Makes a Widget?

Widgets are flexible. They can display data, communicate insights, indicate changes, or show trends. They can be broad or more nuanced according to the trader's workflow and preferences.

Size

Widgets can be created in 3 sizes based on a 4 column grid. The 1/2x widget is half the height of the 1x and 3x widgets.



Change the View

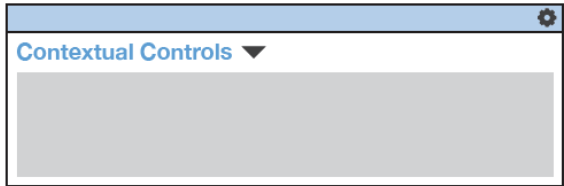
Along with multiple sizes, there are 3 different types of views available for widgets. Not all display views are available for all sizes.

	Chart	Table	Indicator
3x	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1x	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1/2x			<input checked="" type="checkbox"/>

Note: The indicator can be displayed as part of the 3x and 1x widgets. However, it is the only display type for the 1/2x widget size.

Set Preferences

Important contextual controls can be surfaced. Otherwise, traders can set widget preferences through global settings.

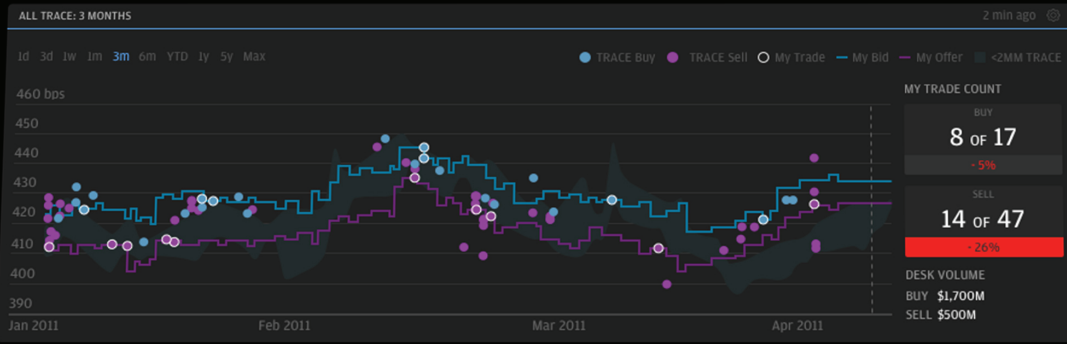


Q K 4% 12/15/2020

CUSIP 487836D9 Rating Baa2, BBB, BBB Call Date 12/11/2016
Outstanding \$850MM of \$1MM Market Iss. Reg S View in DES

Pricing Dashboard

Overview



WATCHLIST: 1 WEEK 1 min ago

- JULI: 191.81bp
+ \$2.95 bp (0.55%)
- CDX IG NA: 116bps
+ 6.95bp (4.50%)
- SPX IND: 1,991.81
- 9.95bp (0.50%)
- WTI Crude Oil: \$36.55
- \$3.65 (10.16%)

ALL TRACE: 3 MONTHS 2 min ago

Time	D	Spread	Size	Priced
12:14:58	S	435.0	5,000M+	
12:14:58	S	435.0	5,000M+	×
11:49:13	S-D	427.0	3,000M	
11:41:05	S	435.5	5,000M+	✓
9:49:08	B	435.0	5,000M+	✓
9:45:00	B	425.4	2,000M	×
9:40:25	B	425.8	2,000M	✓
9:34:45	B-A	430.2	5,000M+	
03/31/11	B	438.6	5,000M+	×

INVENTORY 6 hrs ago

JPM POSITION

ME	DESK
\$3,000M + 25% this week	\$4,100M + 130% this week

TRACE VOLUME: 1 WEEK \$3,000M (+ 87.5%)

INTEREST LEVEL: 1 WEEK 1 min ago

RFQ COUNT

BIDS	OFFERS
11 - 5%	117 + 31%

RFQ VOLUME BID \$12,200M OFFER \$50,000M

RELATED PRICES: 1 DAY < 1 min ago

K: \$69.95 + \$1.42 (2.07%)	S&P BBB: \$106.10 + \$0.60 (0.56%)
5YR CDS: 63bp + 8bp (0.08%)	GTS: 1.74% - 1bp (0.01%)

NEWS 1 min ago

LATEST EARNINGS: Apr 5, Q1 earnings outperform most...

ANALYST RATING: Neutral (downgraded Feb 5 2016)

- 1hr Kellogg Board of Directors Announce...
- 1d Kellogg announces acquisition of small local...

HG DESK CASH ACTIVITY: 1 DAY 5 min ago

TRADE VOLUME

BUYS	SELLS
\$102,700M - 16%	\$289,250M + 25%

TRADE COUNT BUY 134 SELL 367

HG DESK CDS ACTIVITY: 1 DAY 2 min ago

TRADE VOLUME

BUY PROTECTION	SELL PROTECTION
\$172,300M + 32%	\$89,000M - 13%

TRADE COUNT BUY 34 SELL 67

