

Modernizing an Enterprise Investments Platform

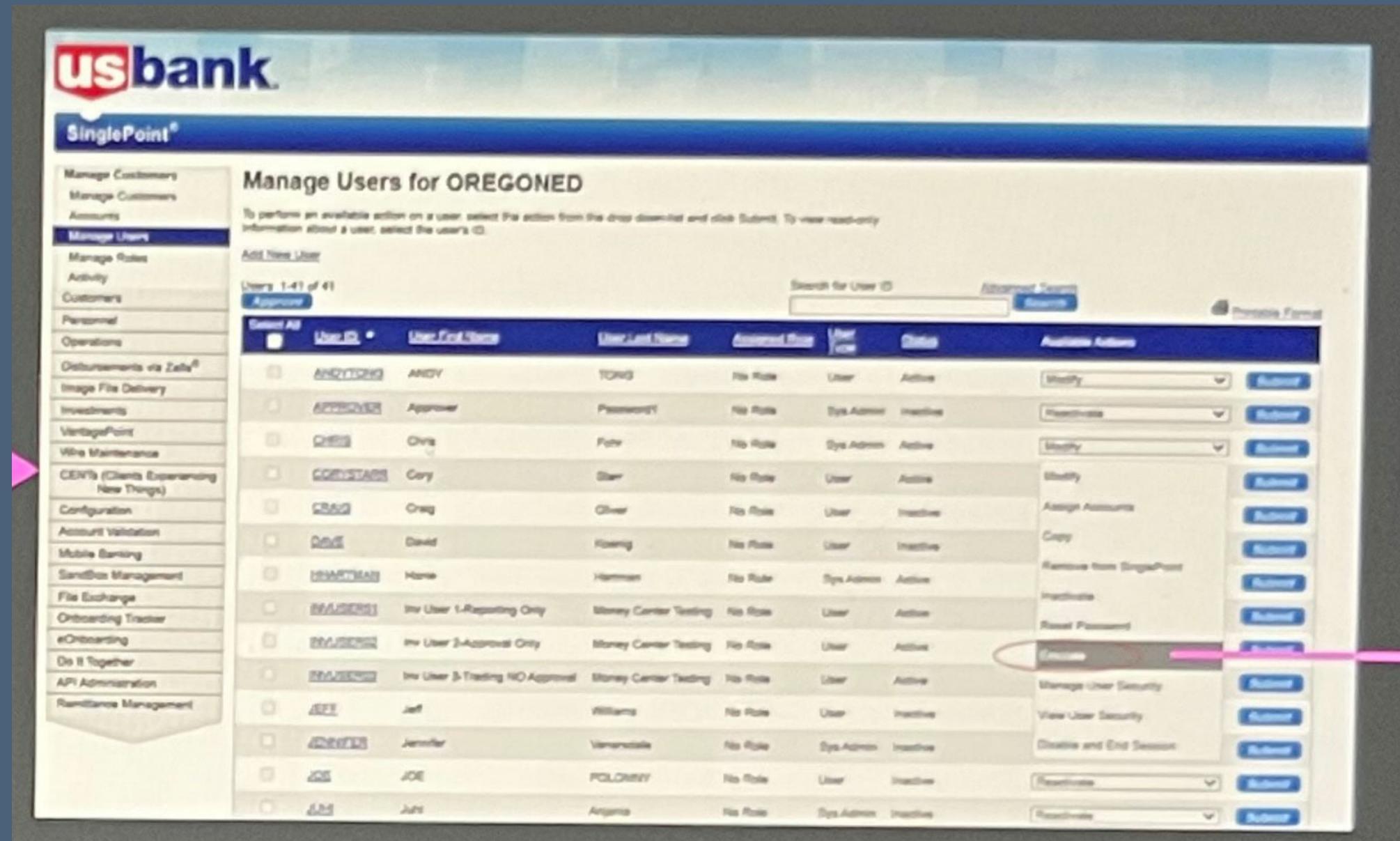
Executive Summary Case Study

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Current State

Fragmented, Legacy Investments Experience at Scale

- Fragmented information architecture across features
- Legacy UI patterns and inconsistent navigation models
- High cognitive load for investment analysis and trades



Future State

Unified Investments Experience Designed for Scale

- Unified information architecture centered on core investment intent
- Clearer structural separation between analysis and execution
- Consistent interaction patterns across core investment tasks
- Scalable, accessible foundation aligned with enterprise design standards

Access Investment Summary



Review Key Investment Details

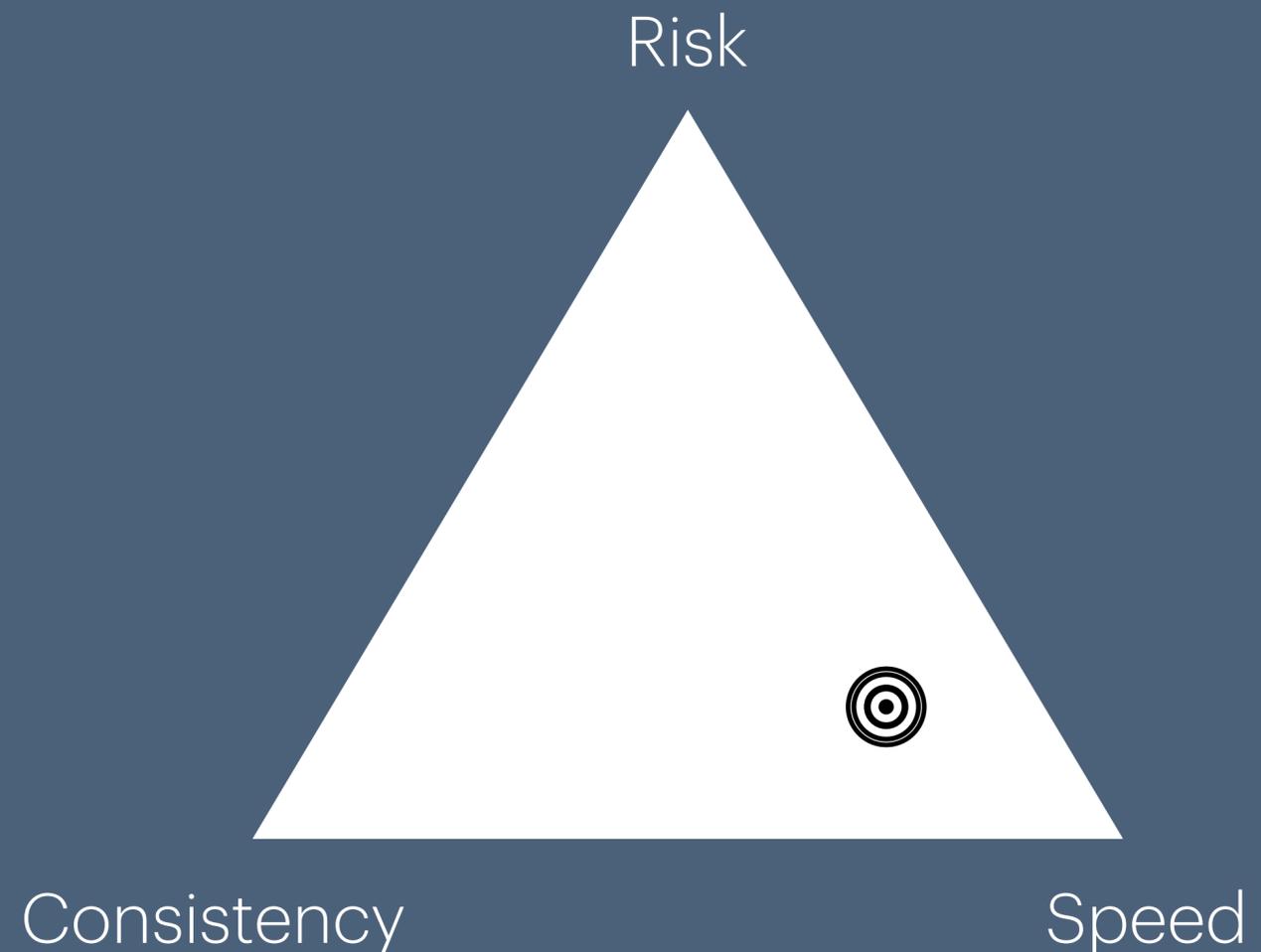


Execute Trade

Feedback and Constraints

Balancing Speed, Consistency, and Risk

- Primary business driver was speed-to-market and visual alignment
- Formal research was not available for this phase
- Accessibility and content compliance treated as baseline requirements
- Design decisions optimized for reuse of design system components



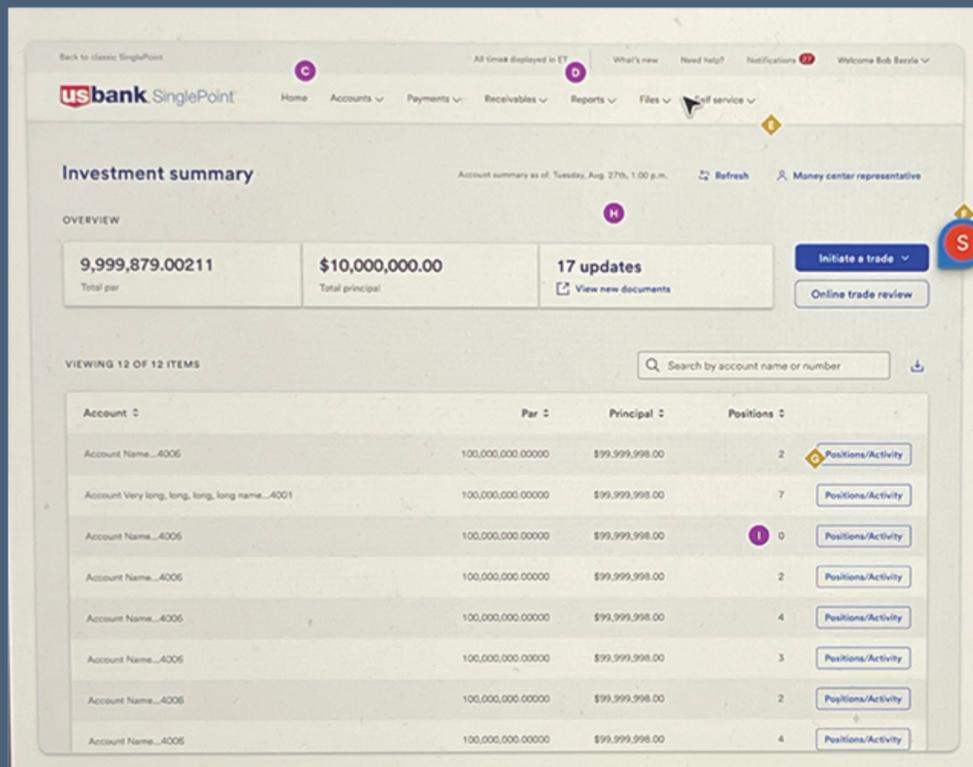
What Was Proposed

Foundational Modernization of the Investments Experience

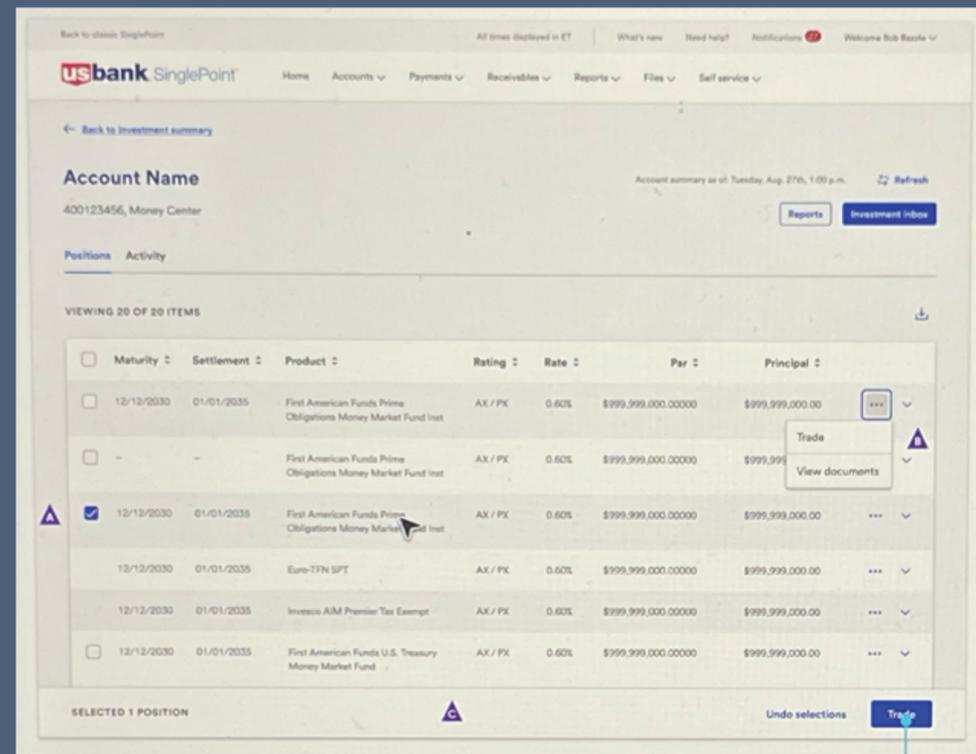
- Modernized investment flows using enterprise design system components
- Clarified and structured distinct liquid and term trading flows within a unified framework
- Standardized layouts, content, and interaction patterns across trading experiences
- Defined a scalable baseline for future investment features

What Was Proposed

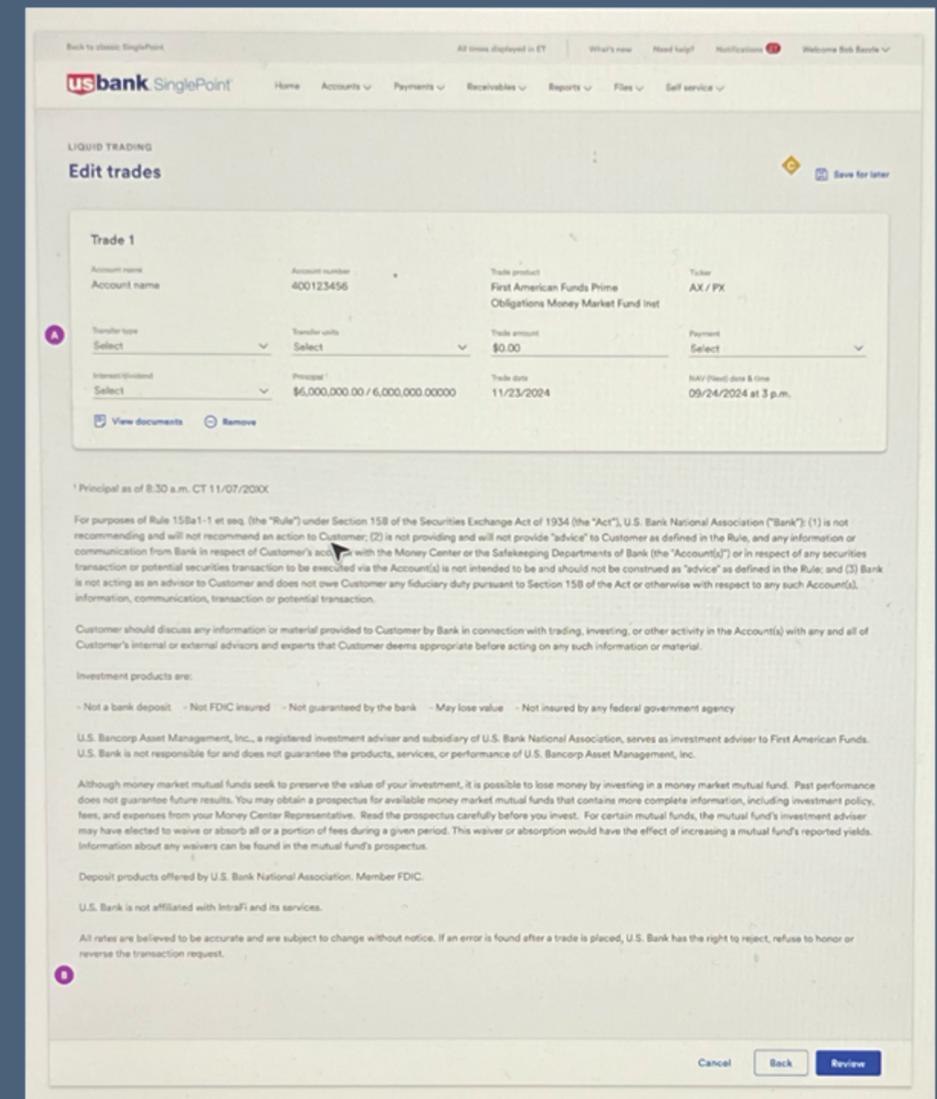
Liquid Trading Flow



User goal: select account



User goal: select position



User goal: review & submit

Illustrates the proposed, system-aligned liquid trading flow optimized for speed and clarity

What Was Delivered

Production-ready modernization aligned to enterprise standards

- Modernized Investments experience successfully deployed within SinglePoint
- Liquid and Term trading delivered as distinct, clearly defined flows
- Fully aligned with enterprise design system, accessibility, and content standards
- Enabled incremental rollout through phased engineering delivery

