

UI/UX design for a web-based broker platform and native mobile app

A Unified Platform for Novices and Experts Alike

Client & Context

A Romanian brokerage firm asked us to merge its separate currency platforms into one accessible, transparent trading solution. We delivered a simplified, intuitive interface to streamline operations and attract new users.



Project Team

Cristian

Product Manager & Strategy

Coz

Creative Director and Lead UX/UI Designer on the project

Adina

UX/UI Designer and Project Manager on the project. Did wireframing, Design system and information hierarchy

Adrian

UI/UX Designer. Research and design. Design system and themes.



1. Research & Briefing Phase

This phase lays the strategic foundation. It ensures that every design decision is informed by real user needs, business goals, and market context.

Stakeholder Interviews & Workshops

- Gather insights from internal teams and external stakeholders.
- Define business objectives, user expectations, and technical constraints.

User Research

- Conduct surveys and competitor analysis.
- Identify user personas, pain points, and behavioral patterns.

Market & Regulatory Analysis

- Understand the financial brokerage landscape.
- Ensure compliance with relevant regulations (e.g., KYC, GDPR).

Briefing & Strategy Definition

- Consolidate findings into a strategic brief.
- Define project scope, success metrics, and design principles

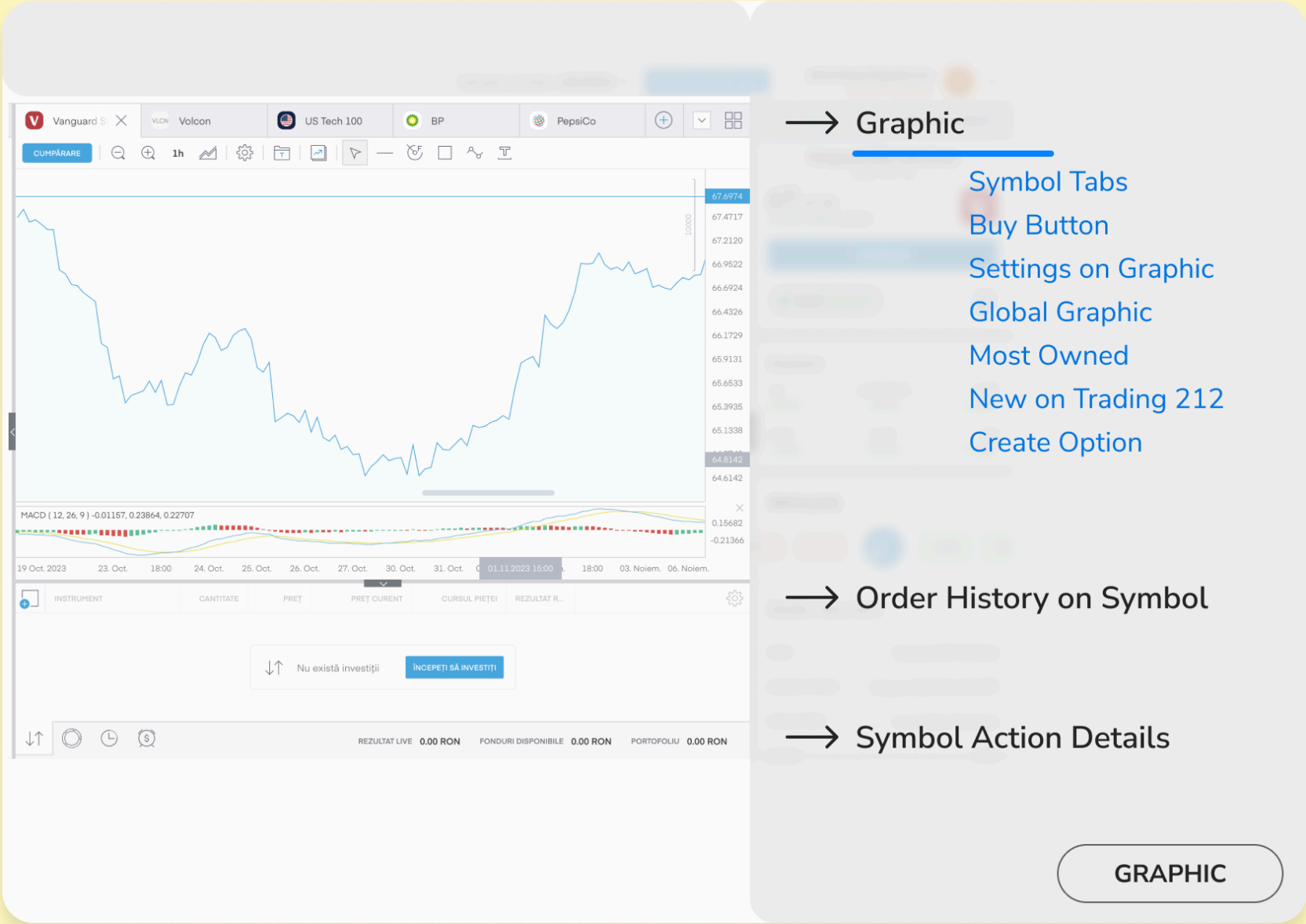
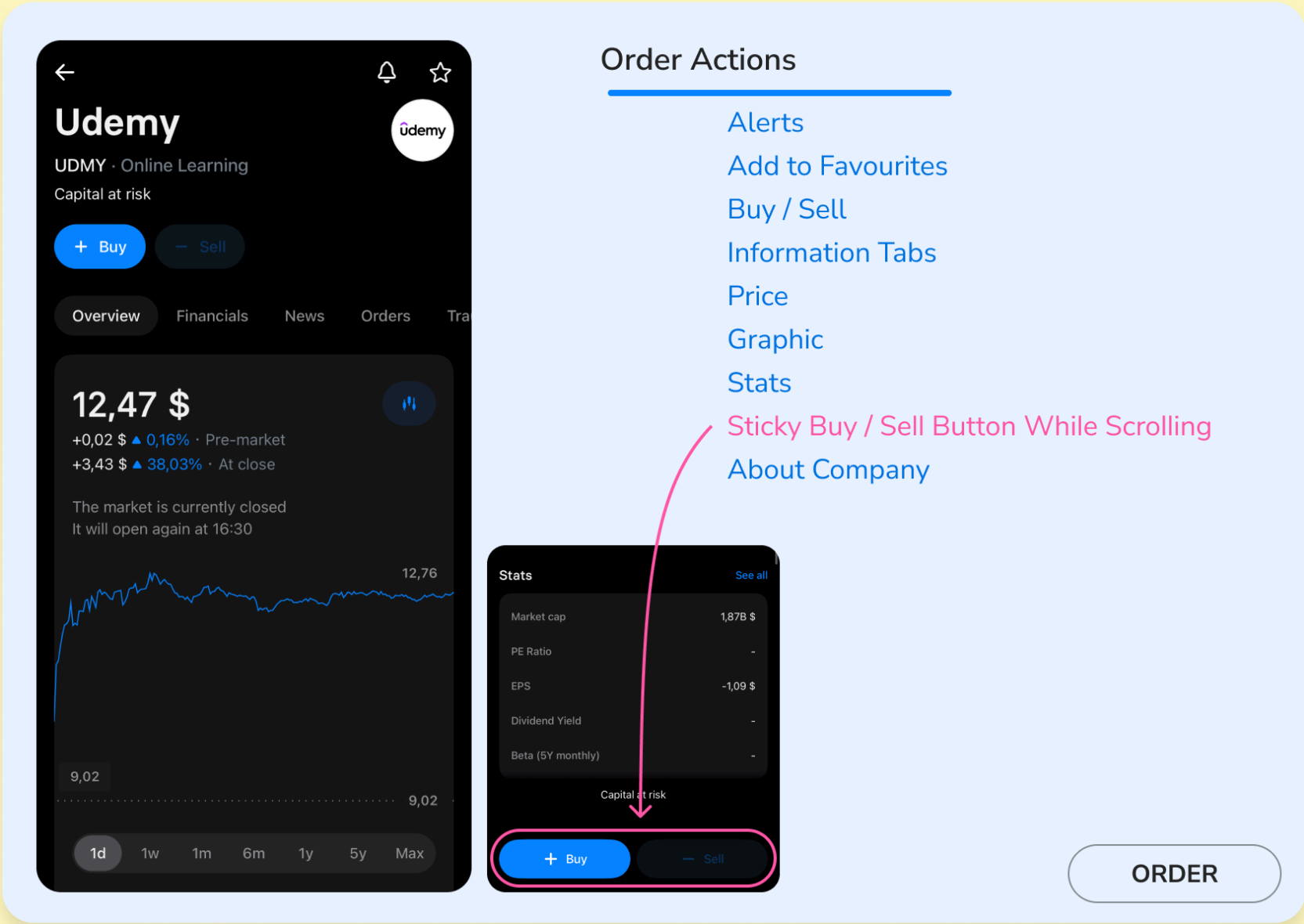
Stakeholder Interviews & Workshops

At project kickoff, our studio led a series of one-on-one interviews and collaborative workshops with product owners, compliance officers, developers, traders and client representatives.

By surfacing business goals, regulatory mandates and real-world user pain points, we aligned on strategic priorities and technical constraints.

User Research

By combining targeted surveys and interviews with a side-by-side audit of Revolut, Trading 212 and Interactive Brokers on web and mobile, we defined three core personas: Novice Investor, Active Trader and Institutional Manager and mapped their pain points, behaviors and feature gaps to drive our platform’s design priorities.



Trading ≡ × Heatmap +					
⋮	Watchlist	S&P 500 ×		Watchlist	+
	Symbol	Last	Net Chng	Bid	Ask
	TER	129.30	0.33	128.00	129.21
	IPG	31.11	0.00	30.80	31.11
	LVS	42.04	0.06	41.88	42.18
	WYNN	79.72	-0.01	79.70	80.10
	TFC	42.50	0.18	42.35	42.55
	DFS	142.99	0.46	142.35	143.00
	TSLA	241.95	3.58	241.94	241.95
	GLW	44.72	0.22	44.50	44.62
	CDW	225.99	0.62	211.01	229.74
	BBY	97.28	0.00	97.51	98.01
	UHS	240.00	2.00	238.05	242.49
	CEG	262.49	7.38	262.16	262.50
	HON	203.79	0.44	202.30	204.00
	TFX	242.35	0.00	239.00	242.00
	ABBV	193.39	-0.04	193.00	193.46

Simbol	Cumparare	Vanzare	Pret
ASP	0.0000	0.0000	0.0000
ARS	2.726	9.1000	9.1200
AG	9.336	1.4100	1.4200
ARCU	0.0000	4.2200	4.9800
2P	4.766	2.3200	2.3800
AAB26	0.0000	98.1300	98.9900
ALB25B	0.0000	0.0000	0.0000

Simbol	Balanta Efectiva	Disponibil Efectiv	Imobilizari	Pret Plata	Valoarea de Plata	% Investitie	% Castig/Pierdere	Sume
% din Total								

Market & Regulatory Analysis

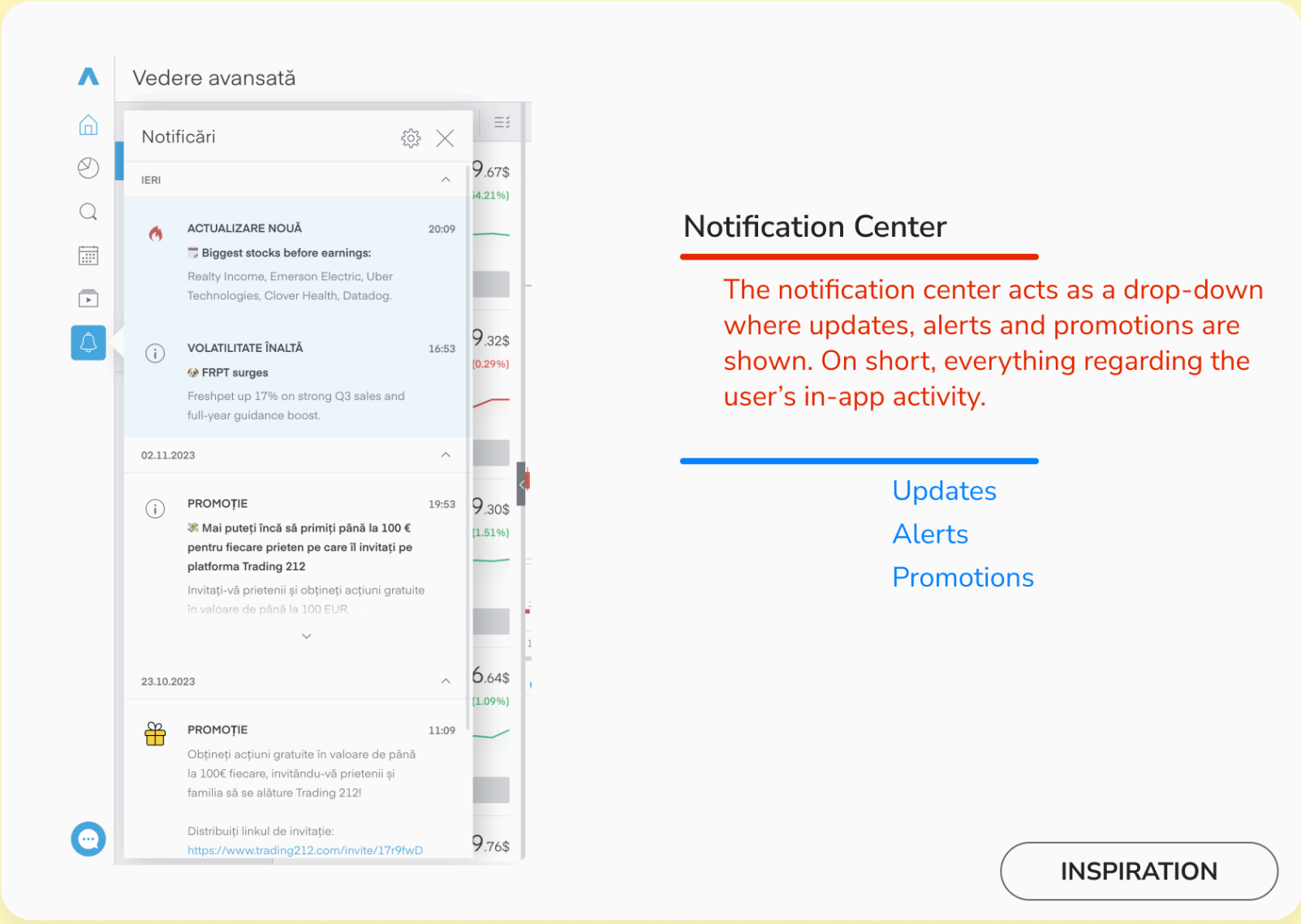
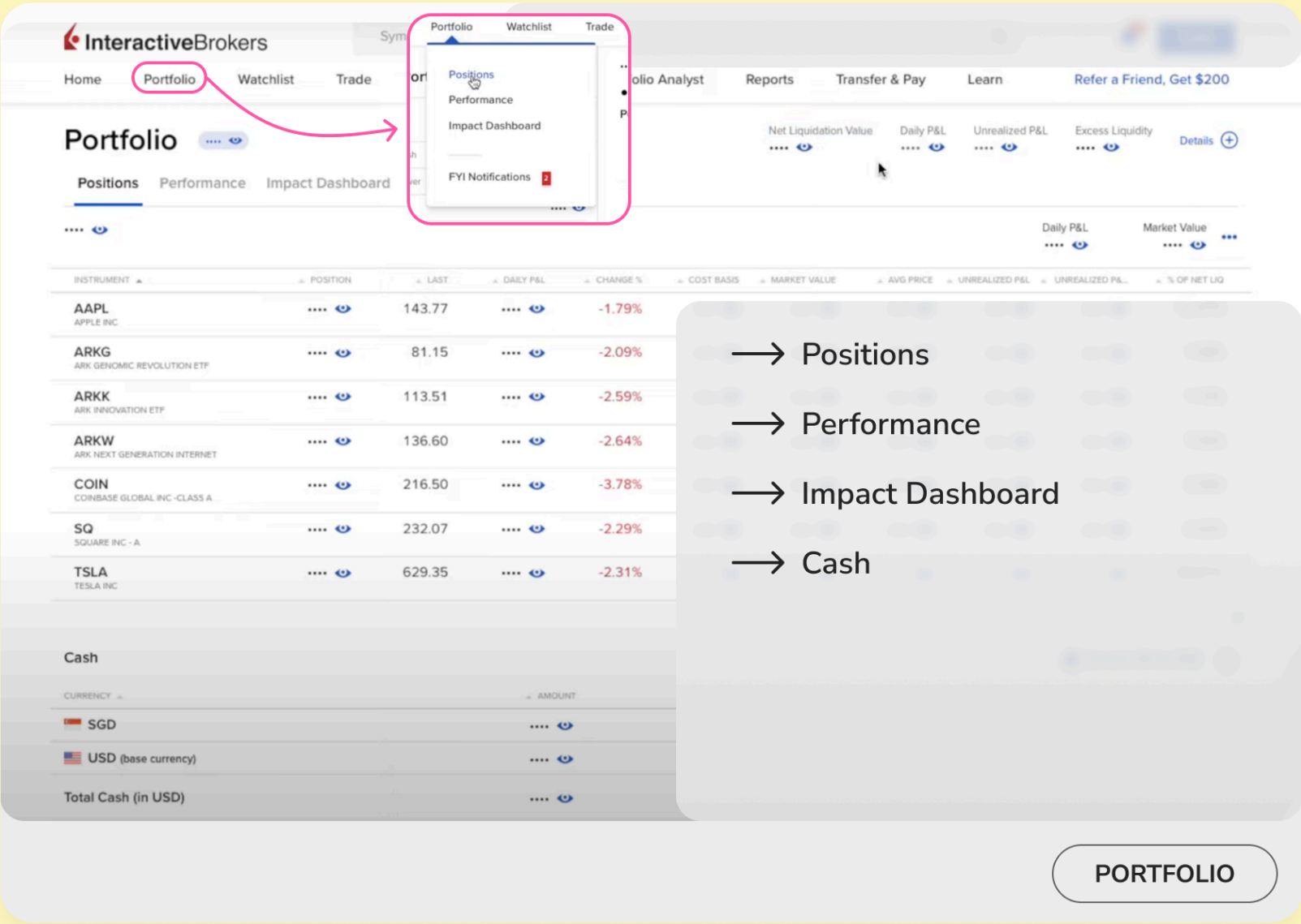
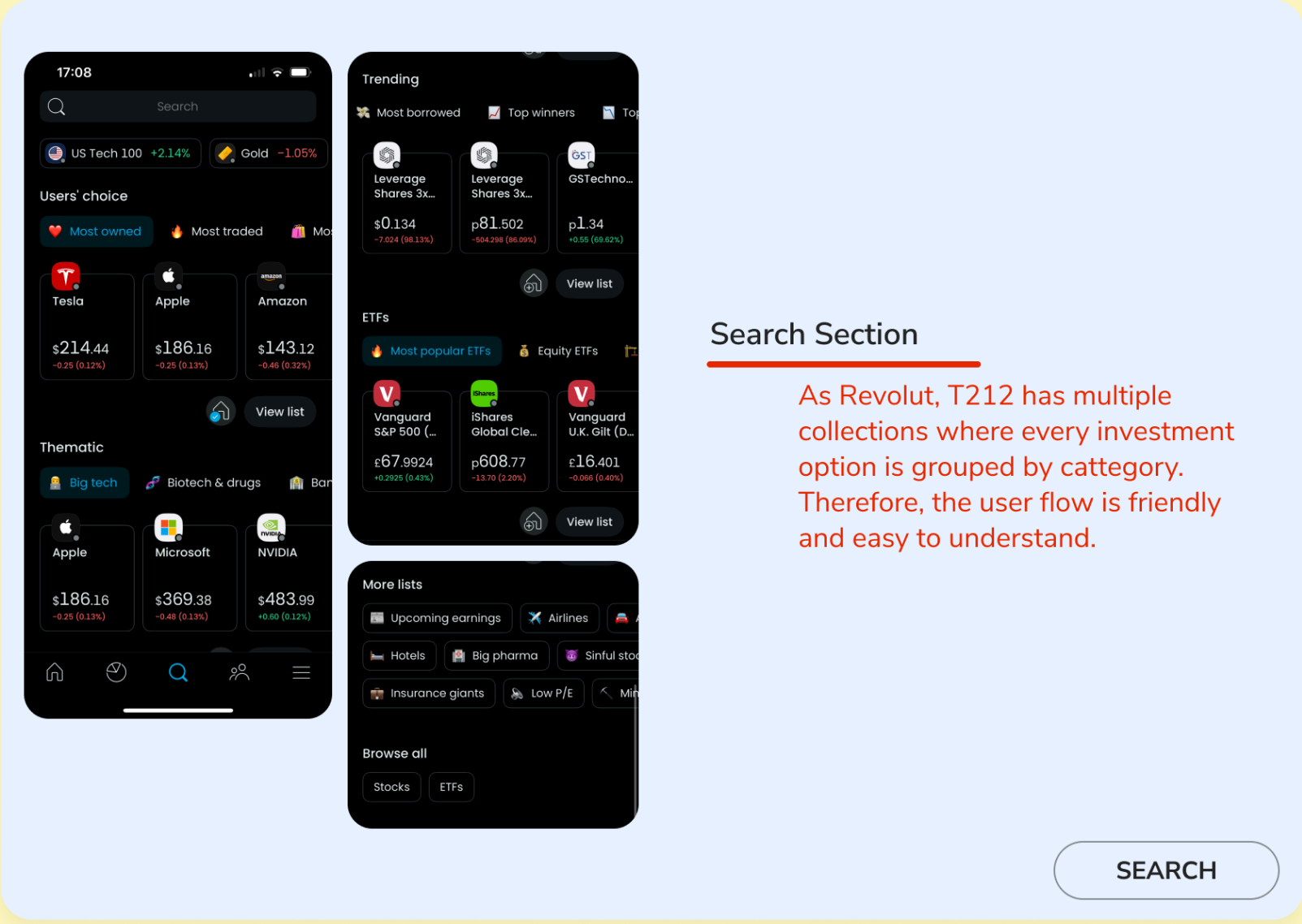
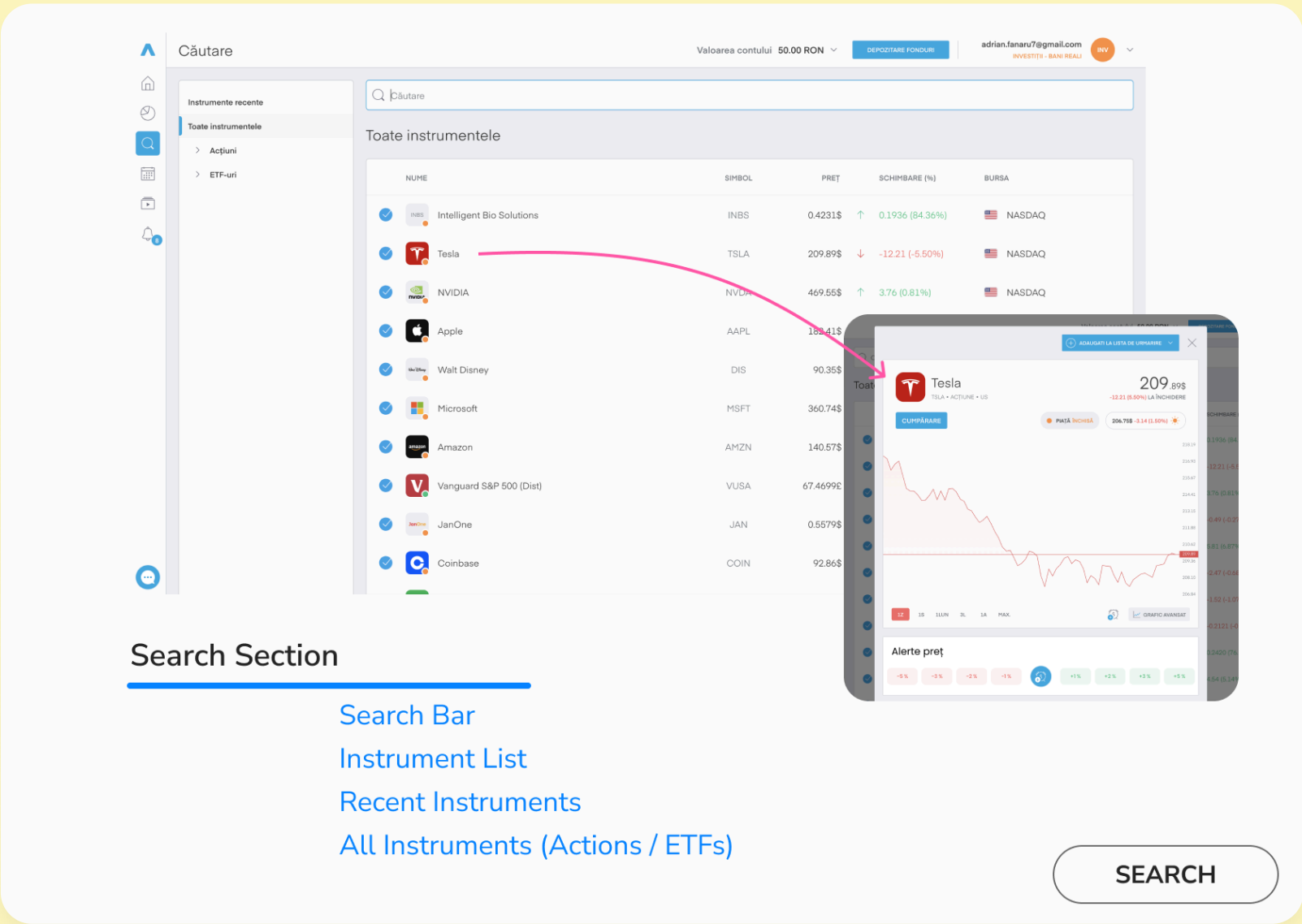
Through a detailed market scan and regulatory audit, we mapped key brokerage features and industry trends, then embedded KYC, GDPR and AML requirements into our onboarding flows and UI components to deliver a secure, compliant trading experience.

Briefing & Strategy Definition

We distilled our insights into a strategic brief defining project scope, success metrics, and core design principles: clear market displays and intuitive navigation at the forefront.

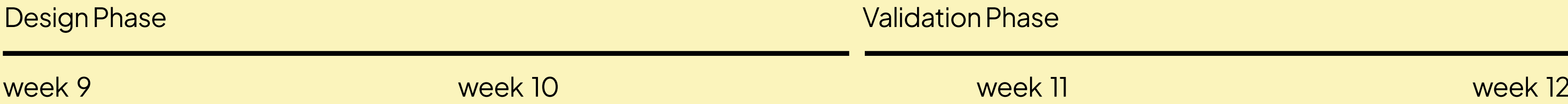
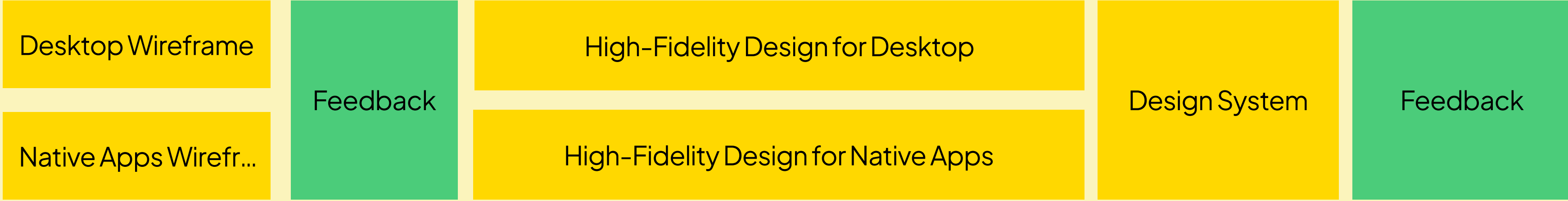
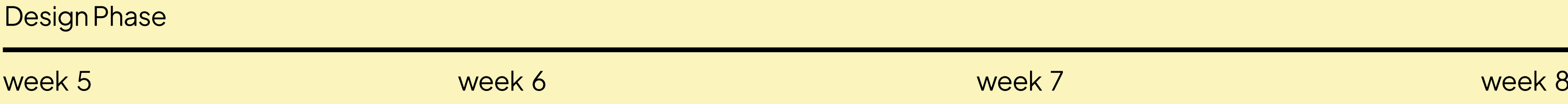
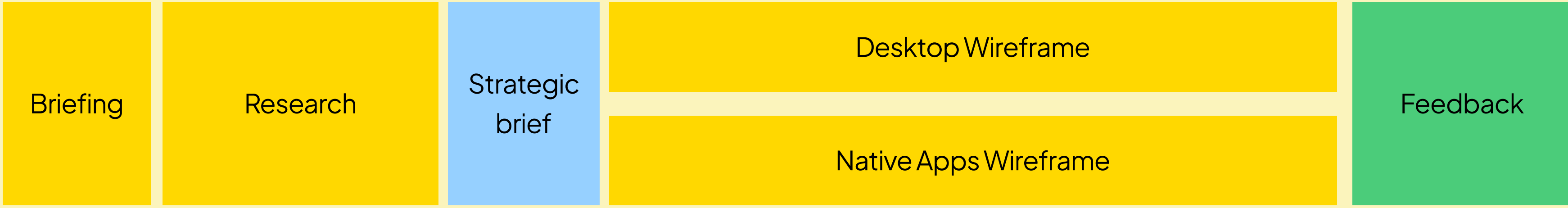
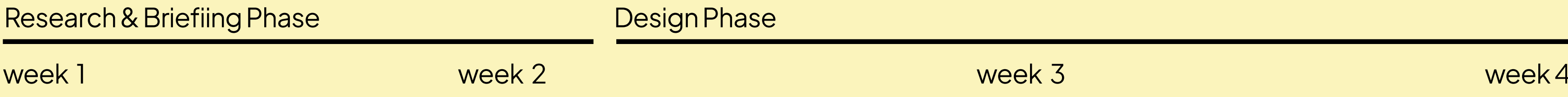
Light and dark modes enhance readability, streamlined portfolio views and personalized notifications boost usability, and quick access to settings drives engagement and trust.

Effortless order placement, even from within portfolios, paired with support for multiple markets and currency accounts (up to four unique portfolios per currency), anchors our roadmap and measurable goals.



Timeline

We outlined the full project timeline from initial briefing to final sign-off. Milestones were tracked collaboratively, keeping stakeholders informed and the project on course for a successful launch.



2. Design Phase

This is where strategy becomes tangible. Our goal was to craft intuitive, engaging, and scalable interfaces for both web and mobile.

Information Architecture

- Map out user flows and navigation structures.
- Define content hierarchy and interaction logic

Wireframing

- Create low-fidelity wireframes for key screens.
- Focus on layout, usability, and functional clarity.

Visual Design

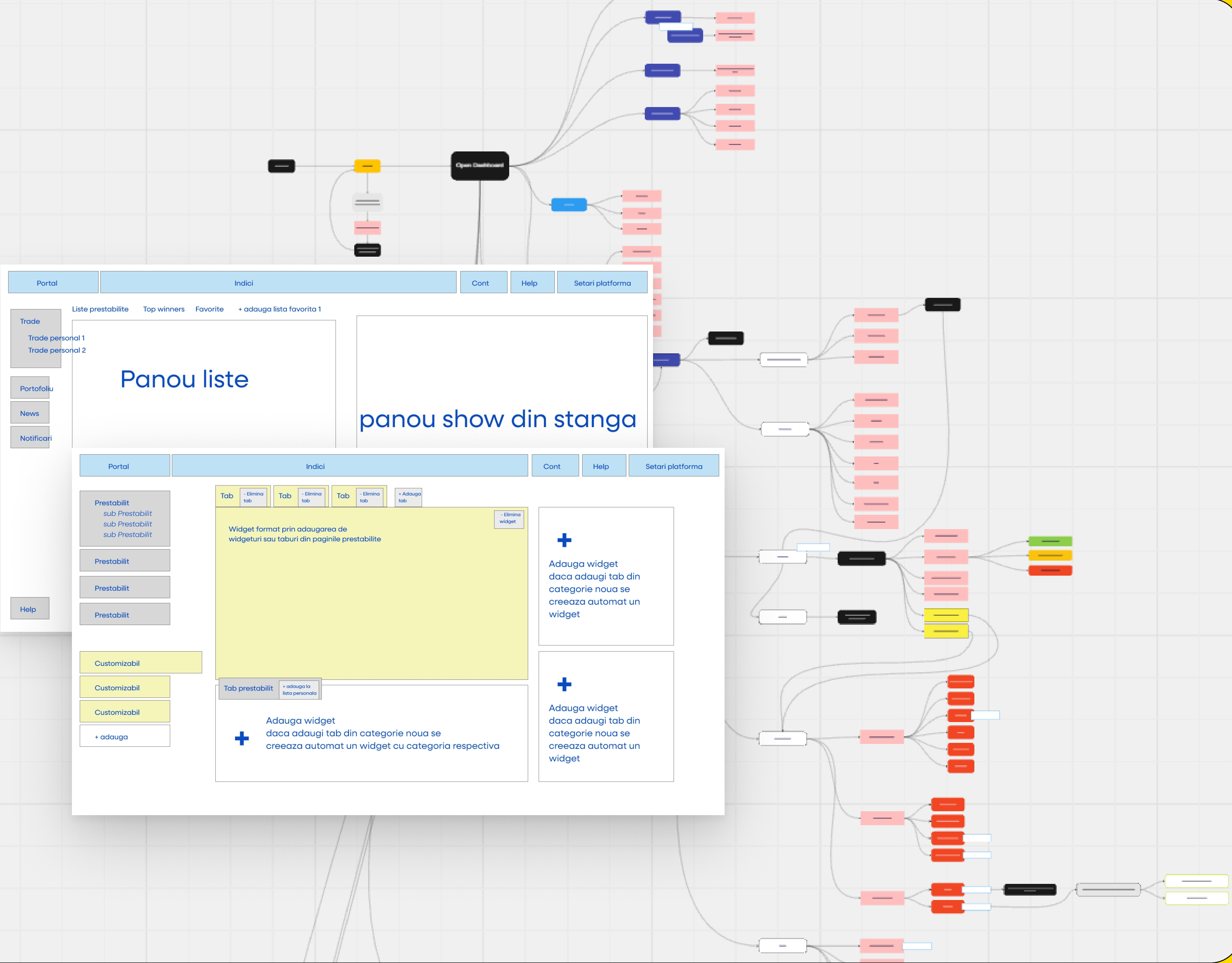
- Develop a cohesive design system (typography, color, components).
- Apply branding and accessibility standards across platforms.

Prototyping

- Build interactive prototypes for web and mobile.
- Simulate real user interactions for testing and stakeholder feedback.

Information Architecture

We crafted detailed user flows and navigation maps to streamline core tasks: trading, portfolio management, account settings and established a clear content hierarchy and interaction logic to guide users intuitively through both the web platform and native mobile app.

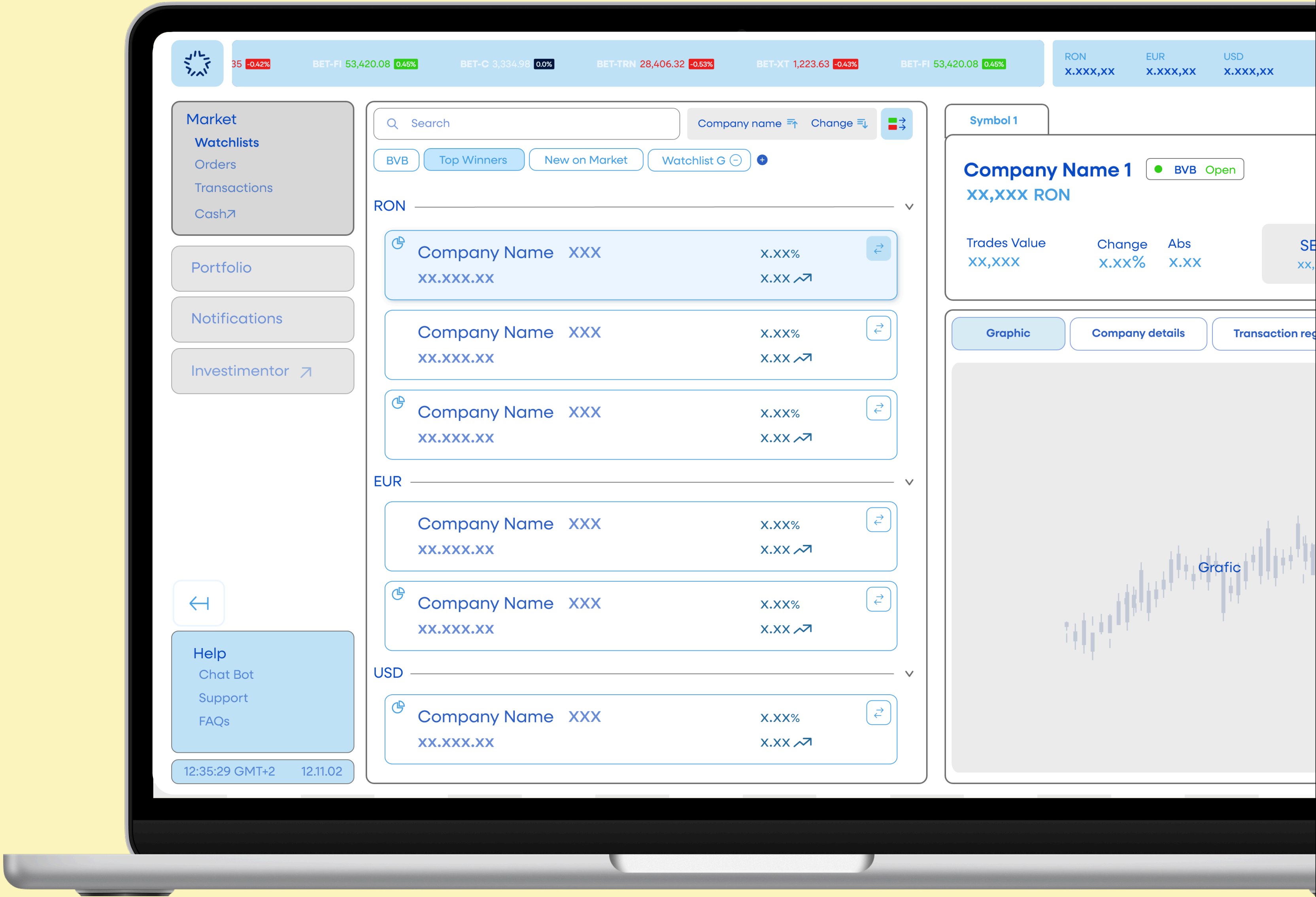


Wireframing (1/2)

Our team sketched low-fidelity wireframes for all primary screens: trading dashboard, portfolio overview, order flows and settings focusing on spatial layout and content hierarchy.

By stripping away visual styling, we highlighted key interaction zones and mapped intuitive pathways for core tasks.

Early stakeholder reviews confirmed that the proposed layouts minimized cognitive load and streamlined user journeys.

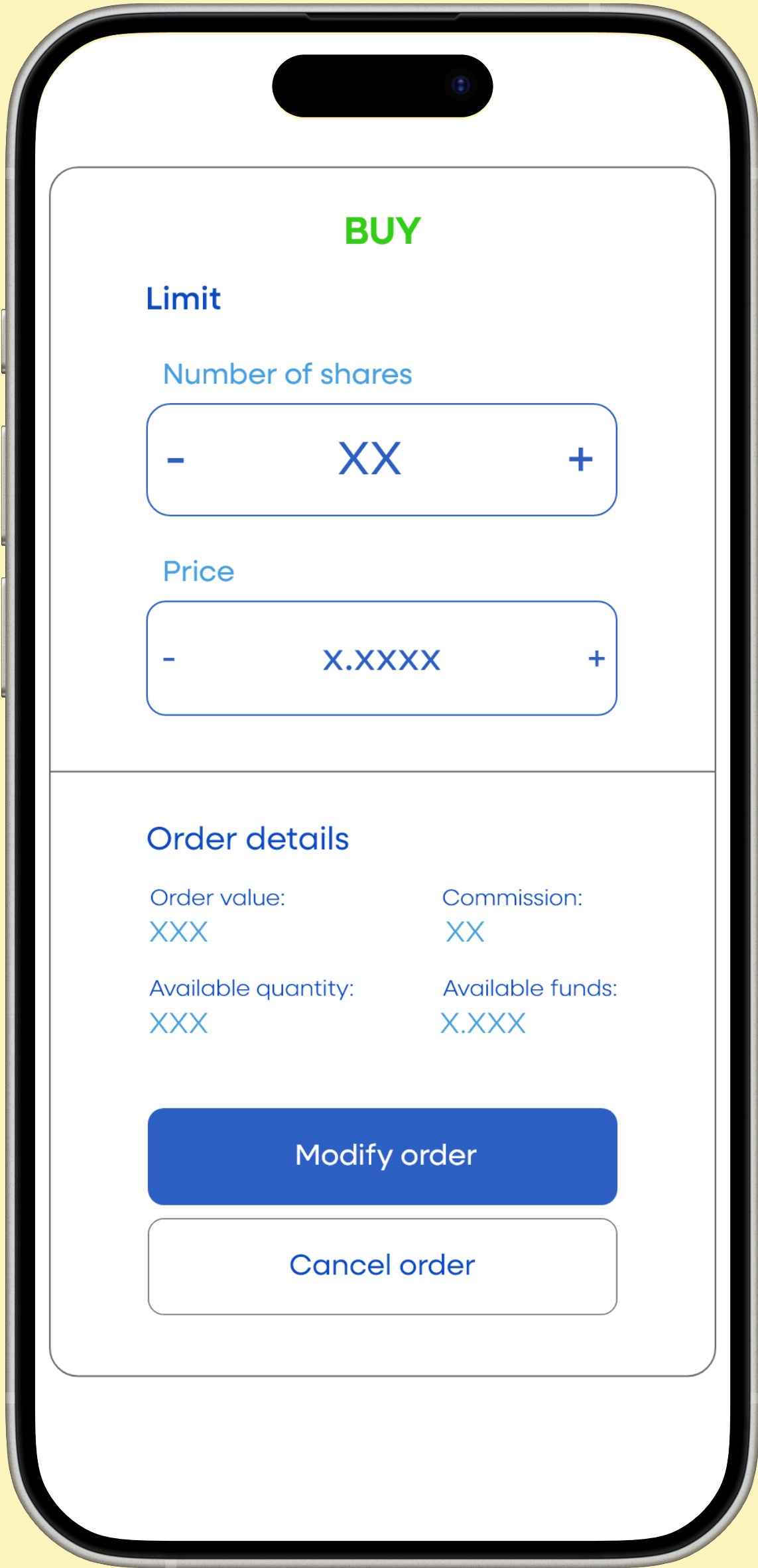
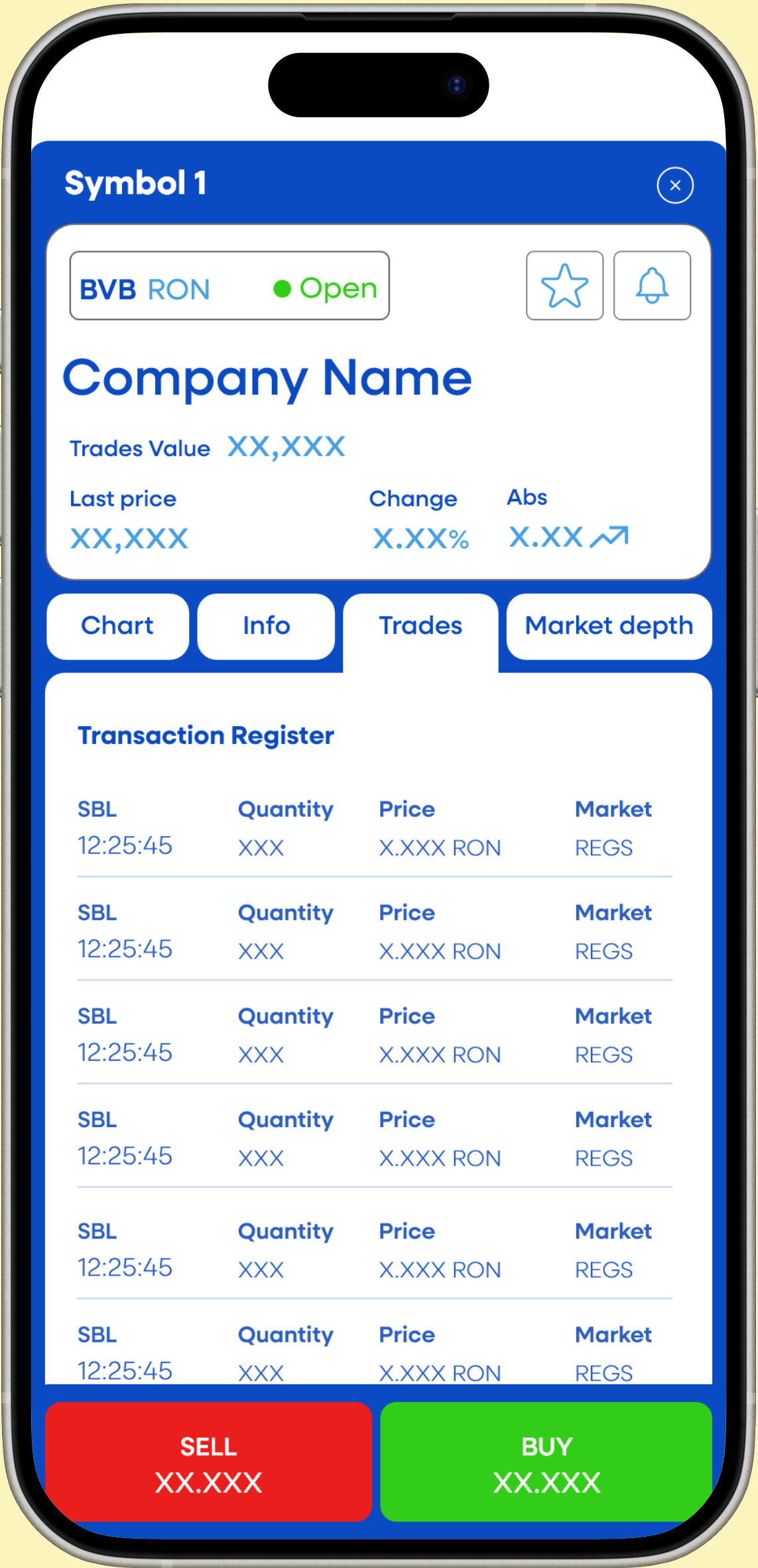


Wireframing (2/2)

Through rapid iteration cycles, we refined each wireframe’s interaction logic and functional clarity, incorporating developer feedback to ensure technical feasibility.

Usability check-ins with internal teams validated that buttons, navigation elements and data panels aligned with user expectations.

This wireframe phase established a solid blueprint for our component library and high-fidelity designs.

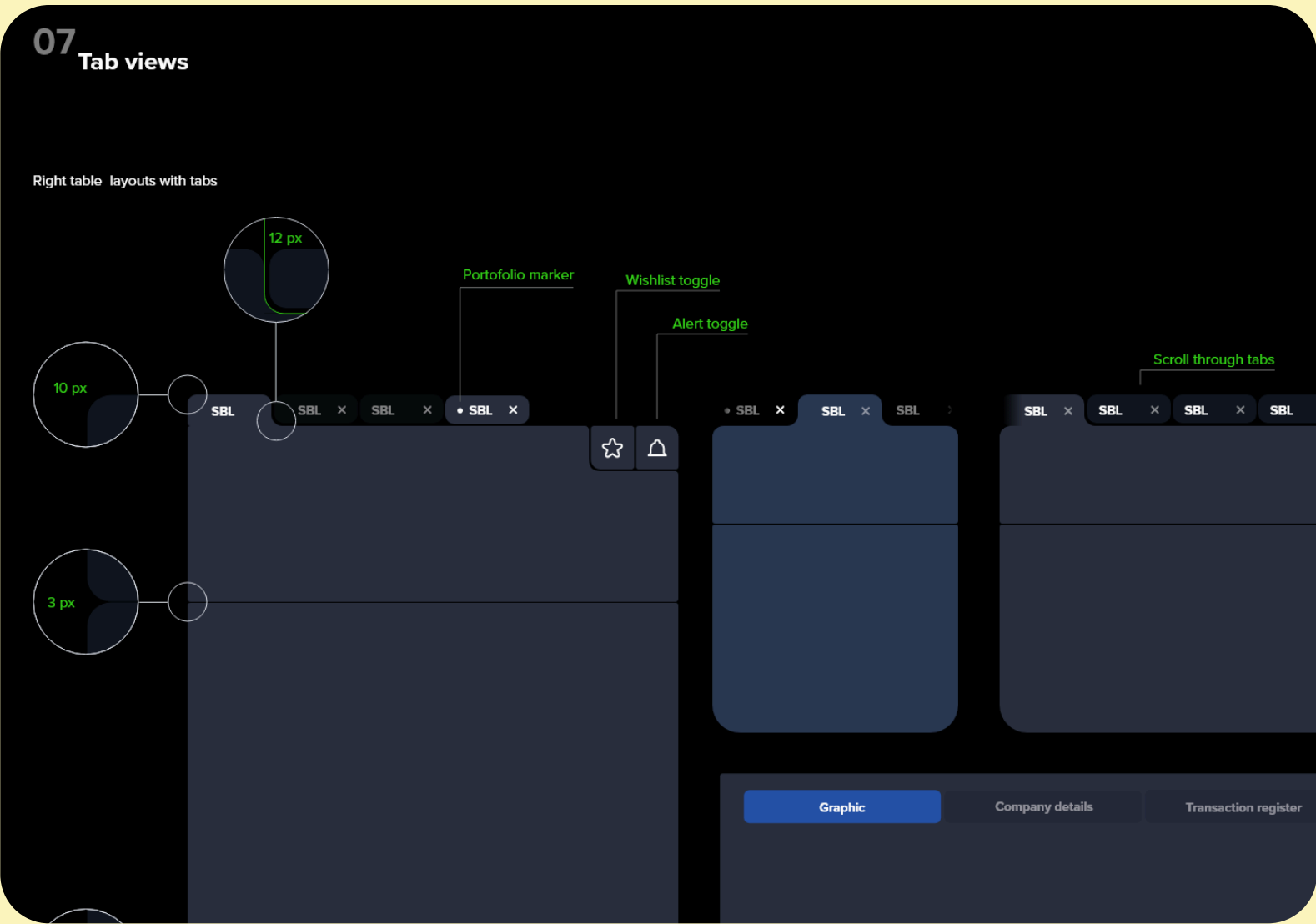
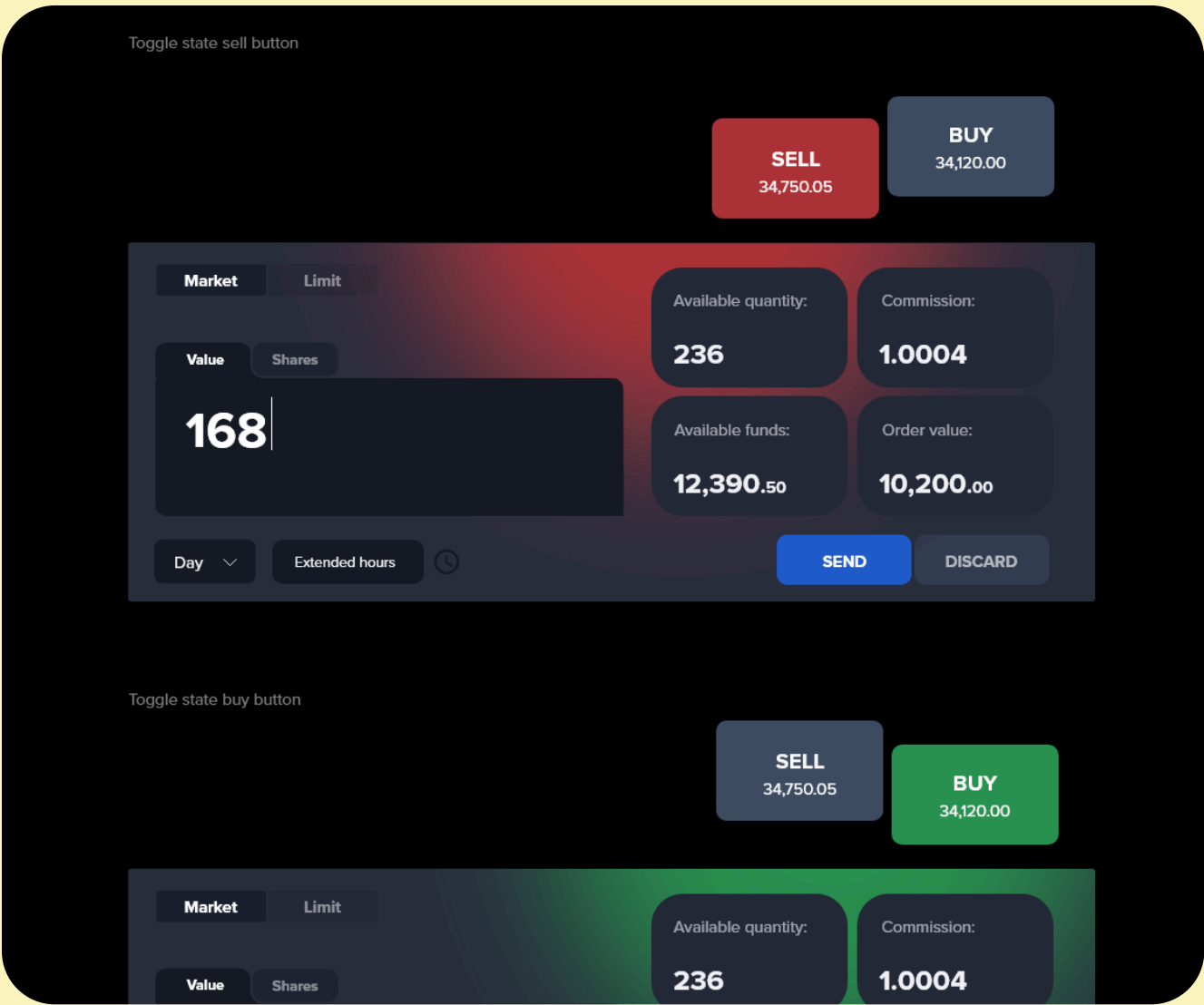
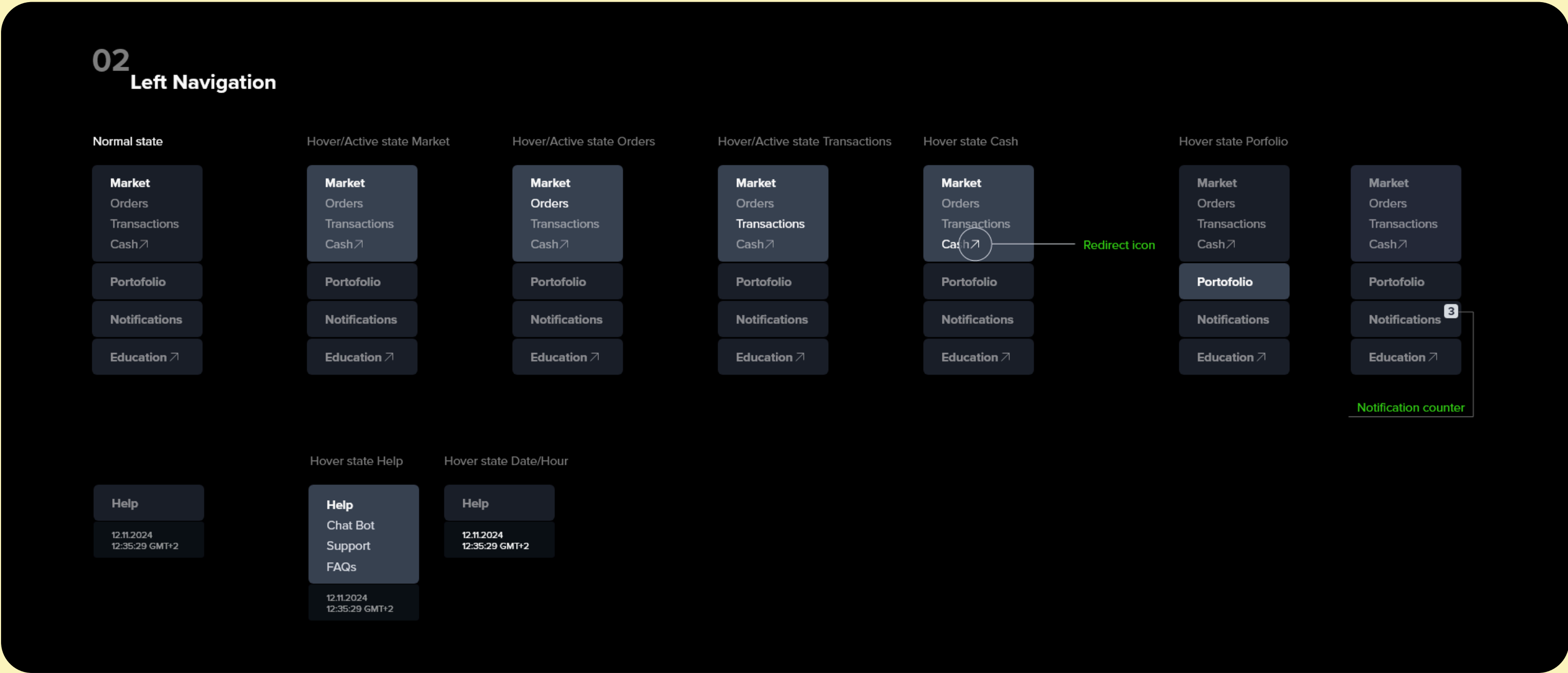


Visual Design & Design System

Our team crafted two cohesive design systems: one for web, one for mobile, that share core principles while adapting to each platform’s unique needs.

Each system meets WCAG accessibility standards with a carefully defined color palette and contrast ratios for optimal readability.

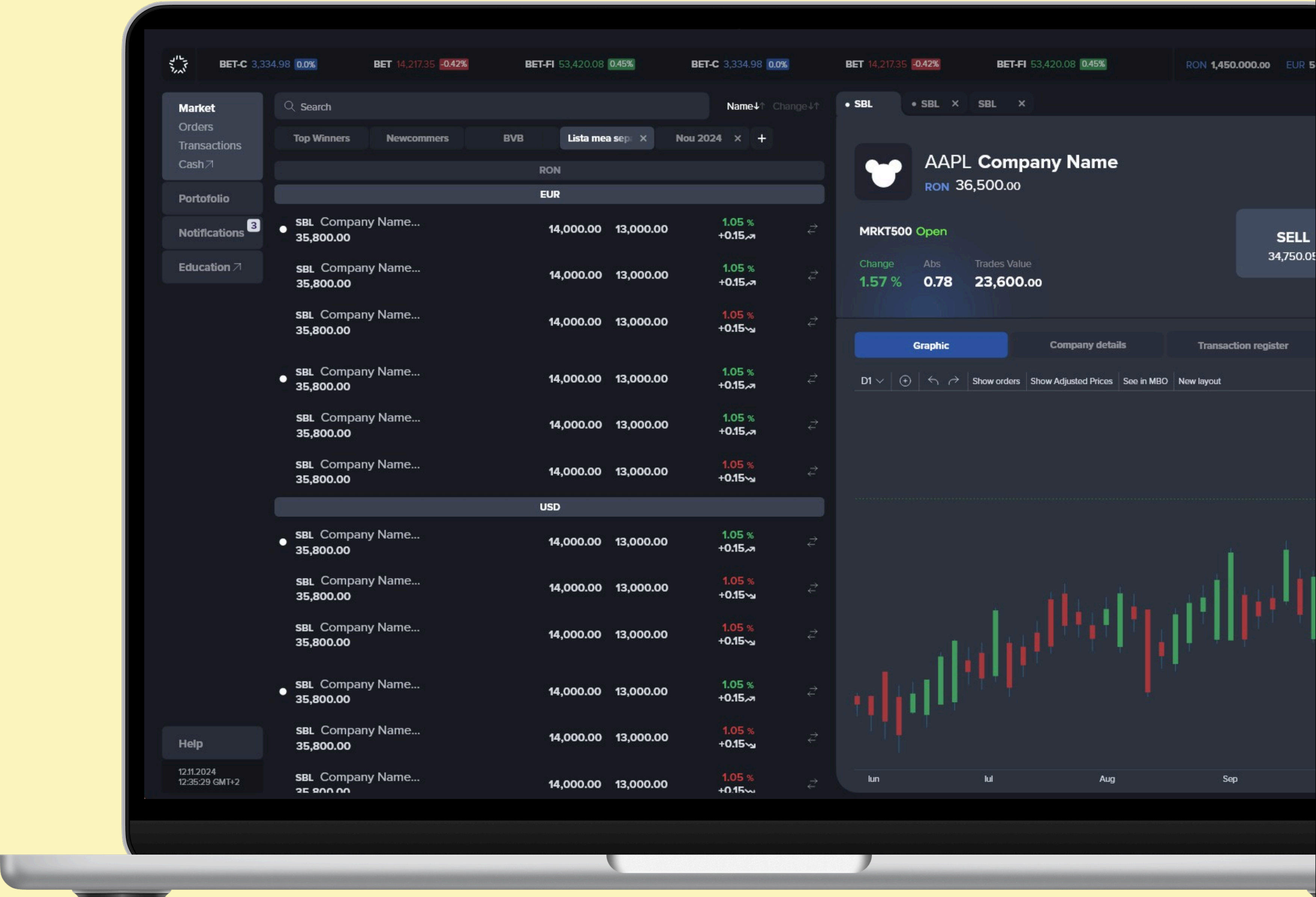
We established clear typography scales and iconography to reinforce hierarchy and built a library of documented, reusable components (buttons, form fields, tables, modals) to ensure consistency and speed up development.



Desktop High Fidelity Design

We transform our approved wireframes for the desktop platform into polished desktop interfaces, bringing the web platform’s design system to life through real-data dashboards, tables, and interactive components rendered in pixel-perfect detail.

This phase focuses on applying color, typography, imagery, and interactive details to ensure every element feels cohesive, accessible, and intuitive on larger screens.



Orders

BET-C

3,334.98

0.0%

BET

14,217.35

-0.42%

BET-FI

53,420.08

0.45%

BET-C

3,334.98

0.0%

BET

14,217.35

-0.42%

BET-FI

53,420.08

0.45%

RON

1,450,000.00

EUR

50,800.00

USD

205,040.00

Market

Orders

Transactions

Cash ↗

Portofolio

Notifications

3

Education ↗

Search

Filters

RON

2023-10-16 12:45:37

SBL

SELL

300 shares

Working Limit/Day +

2023-10-16 12:45:37

SBL

BUY

300 shares

Placed Limit/Day +

2023-10-16 12:45:37

SBL

BUY

300 shares

Initiated Limit/Day +

2023-10-16 12:45:37

SBL

SELL

300 shares

Rejected Limit/Day +

2023-10-16 12:45:37

SBL

BUY

300 shares

Filled Limit/Day +

EUR

USD

2023-10-16 12:45:37

SBL

BUY

300 shares

Filled Limit/Day +

2023-10-16 12:45:37

SBL

BUY

300 shares

Working Limit/Day +

2023-10-16 12:45:37

SBL

SELL

300 shares

Placed Limit/Day +

2023-10-16 12:45:37

SBL

BUY

300 shares

Initiated Limit/Day +

2023-10-16 12:45:37

SBL

SELL

300 shares

Rejected Limit/Day +

2023-10-16 12:45:37

SBL

BUY

300 shares

Initiated Limit/Day +

2023-10-16 12:45:37

SBL

BUY

300 shares

Working Limit/Day +

2023-10-16 12:45:37

SBL

SELL

300 shares

Placed Limit/Day +

ID 1234

AAPL Company Name

BVB RON

AM100202RR1

2023-10-16 12:45:37

Sell Rejected

History

2023-10-16 12:45:37

SBL

300 shares

13,000.00 RON

Rejected

2023-10-16 12:45:37

SBL

300 shares

13,000.00 RON

Filled

2023-10-16 12:45:37

SBL

300 shares

13,000.00 RON

Working

2023-10-16 12:45:37

SBL

300 shares

13,000.00 RON

Placed

2023-10-16 12:45:37

SBL

300 shares

13,000.00 RON

Initiated

Market

Available quantity: 236

Commission: 1.0004

Value 168

Available funds: 12,390.50

Order value: 10,200.00

MODIFY ORDER

CANCEL ORDER

Market

BET-C

3,334.98

0.0%

BET

14,217.35

-0.42%

BET-FI

53,420.08

0.45%

BET-C

3,334.98

0.0%

BET

14,217.35

-0.42%

BET-FI

53,420.08

0.45%

RON

1,450,000.00

EUR

50,800.00

USD

205,040.00

Market

Orders

Transactions

Cash ↗

Portofolio

Notifications

3

Education ↗

Search

Name

Change

Top Winners

Newcomers

BVB

Lista mea sep

Nou 2024

RON

EUR

SBL Company Name...

35,800.00

14,000.00

13,000.00

1.05 % +0.15 ↗

SBL Company Name...

35,800.00

14,000.00

13,000.00

1.05 % +0.15 ↗

SBL Company Name...

35,800.00

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1.05 % +0.15 ↘

SBL Company Name...

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SBL Company Name...

35,800.00

14,000.00

13,000.00

1.05 % +0.15 ↘

AAPL Company Name

RON 36,500.00

MRKT500 Open

Change 1.57 %

Abs 0.78

Trades Value 23,600.00

SELL 34,750.05

BUY 34,120.00

Graphic

Company details

Transaction register

N/A

D1

Show orders

Show Adjusted Prices

See in MBO

New layout

Graphic



Portfolio

Notifications

The image displays a modern fintech dashboard. The top navigation bar includes a dark sidebar on the left with a line chart and a main area with market data for various assets (BET-C, BET, BET-FI, RON, EUR, USD) and their percentage changes. The main content area is divided into two sections: a notification list on the left and an alerts table on the right. The notification list contains four items, each with a title, a checkbox, a description, and a timestamp. The alerts table lists various alerts for different companies (Tesla Inc, Apple Inc) with columns for date, time, company name, alert type, and a 'Go to Market' button. The right sidebar also features a dark sidebar with a line chart and a main area with market data for various assets (BET-C, BET, BET-FI, RON, EUR, USD) and their percentage changes. The main content area is divided into two sections: a notification list on the left and an alerts table on the right. The notification list contains four items, each with a title, a checkbox, a description, and a timestamp. The alerts table lists various alerts for different companies (Tesla Inc, Apple Inc) with columns for date, time, company name, alert type, and a 'Go to Market' button.

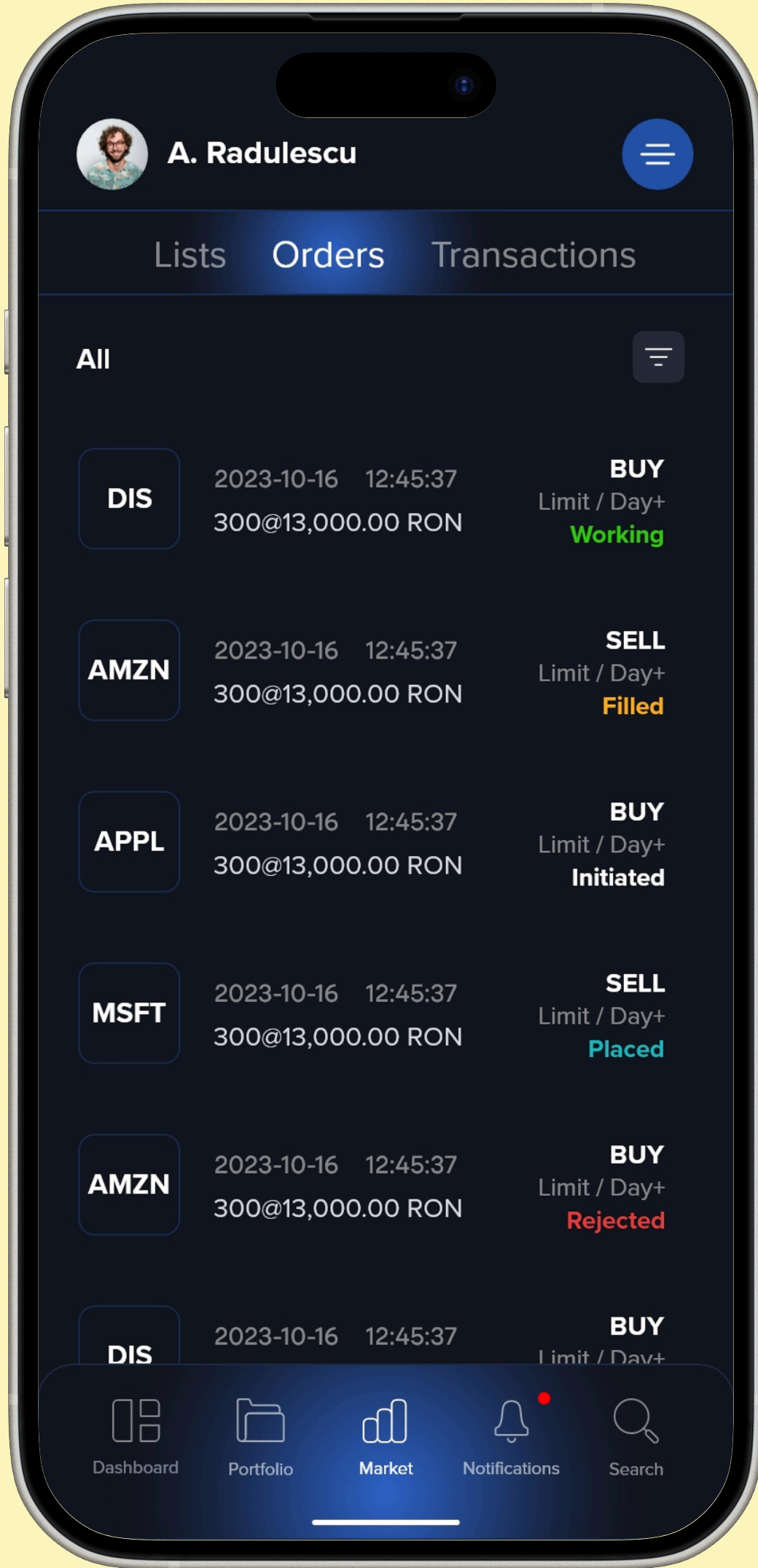
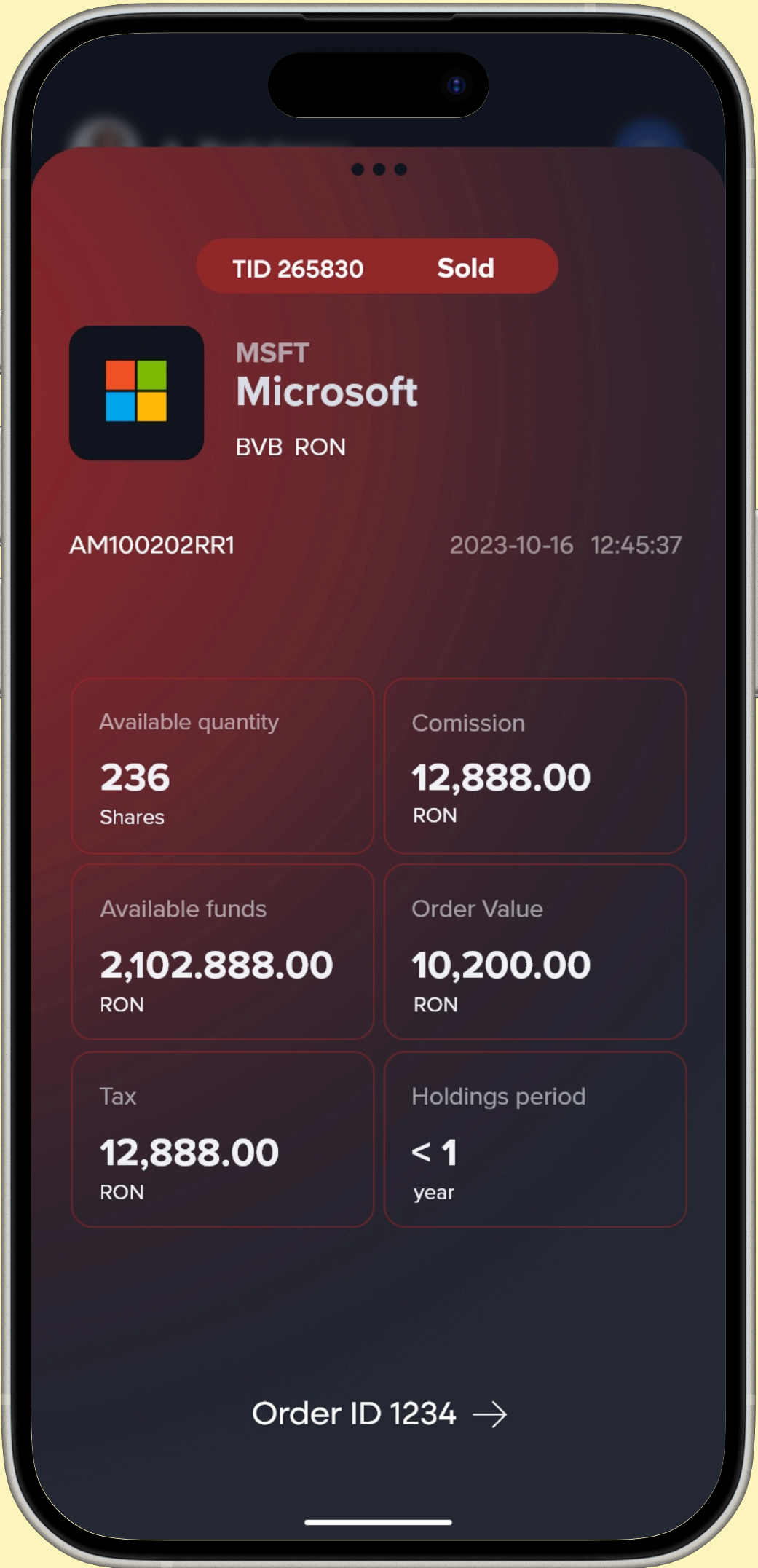
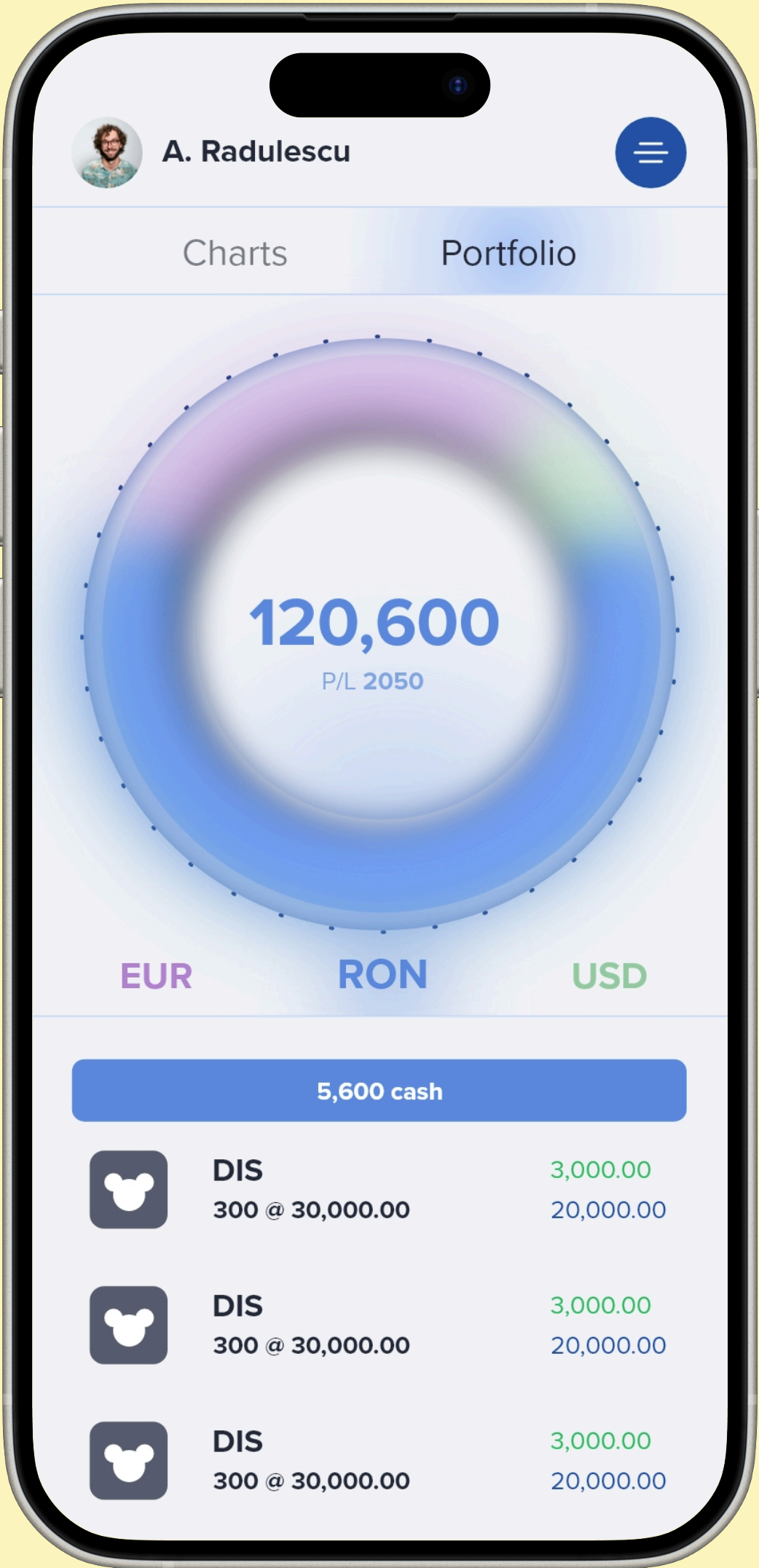
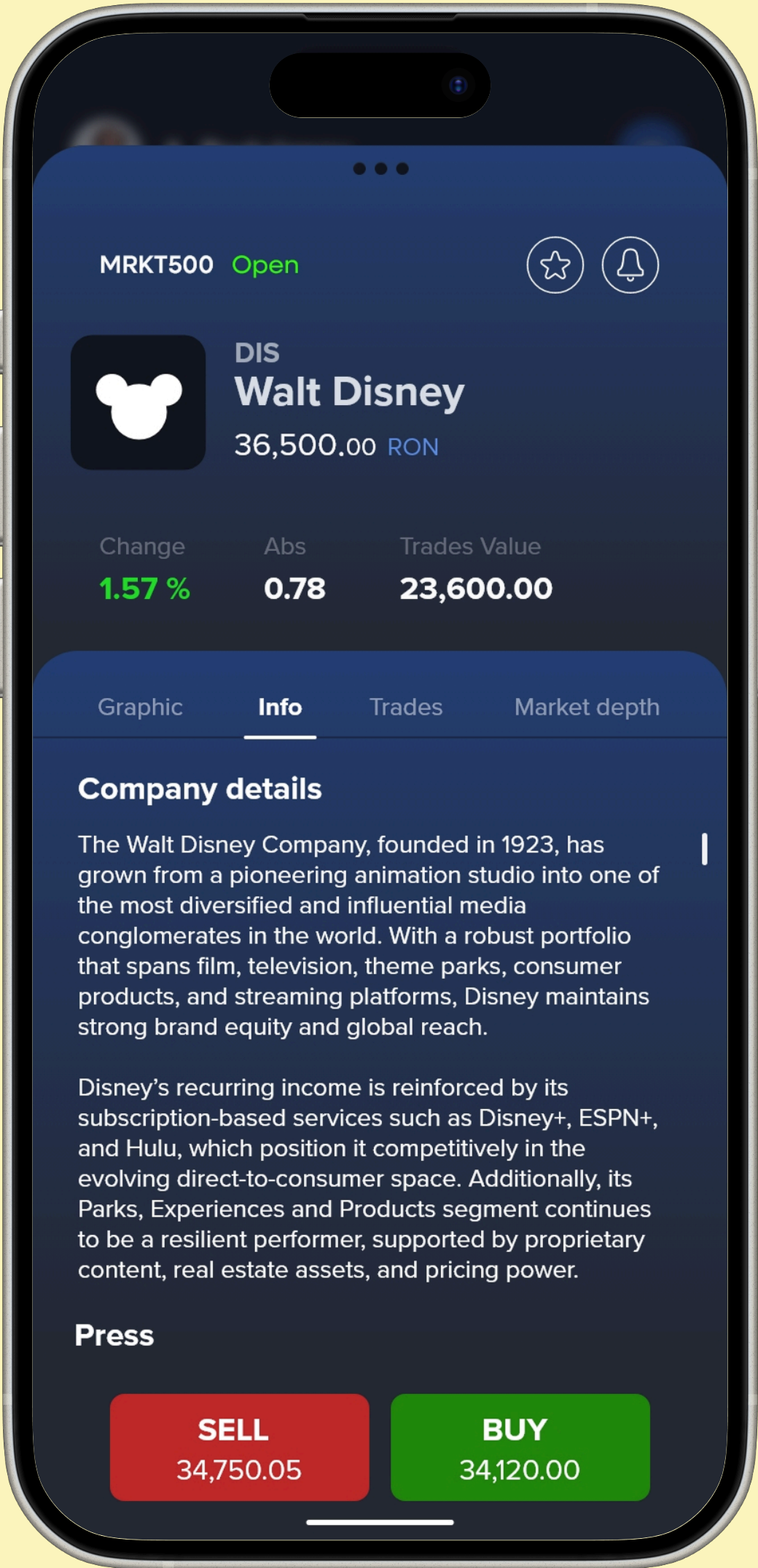
Mobile High Fidelity Design

We brought our design system to life on mobile by tailoring the color palette for small screens and varied lighting, with WCAG-compliant contrast ratios.

Typography scales support dynamic type and legibility, while spacing, elevation, and corner radii respect safe-area insets.

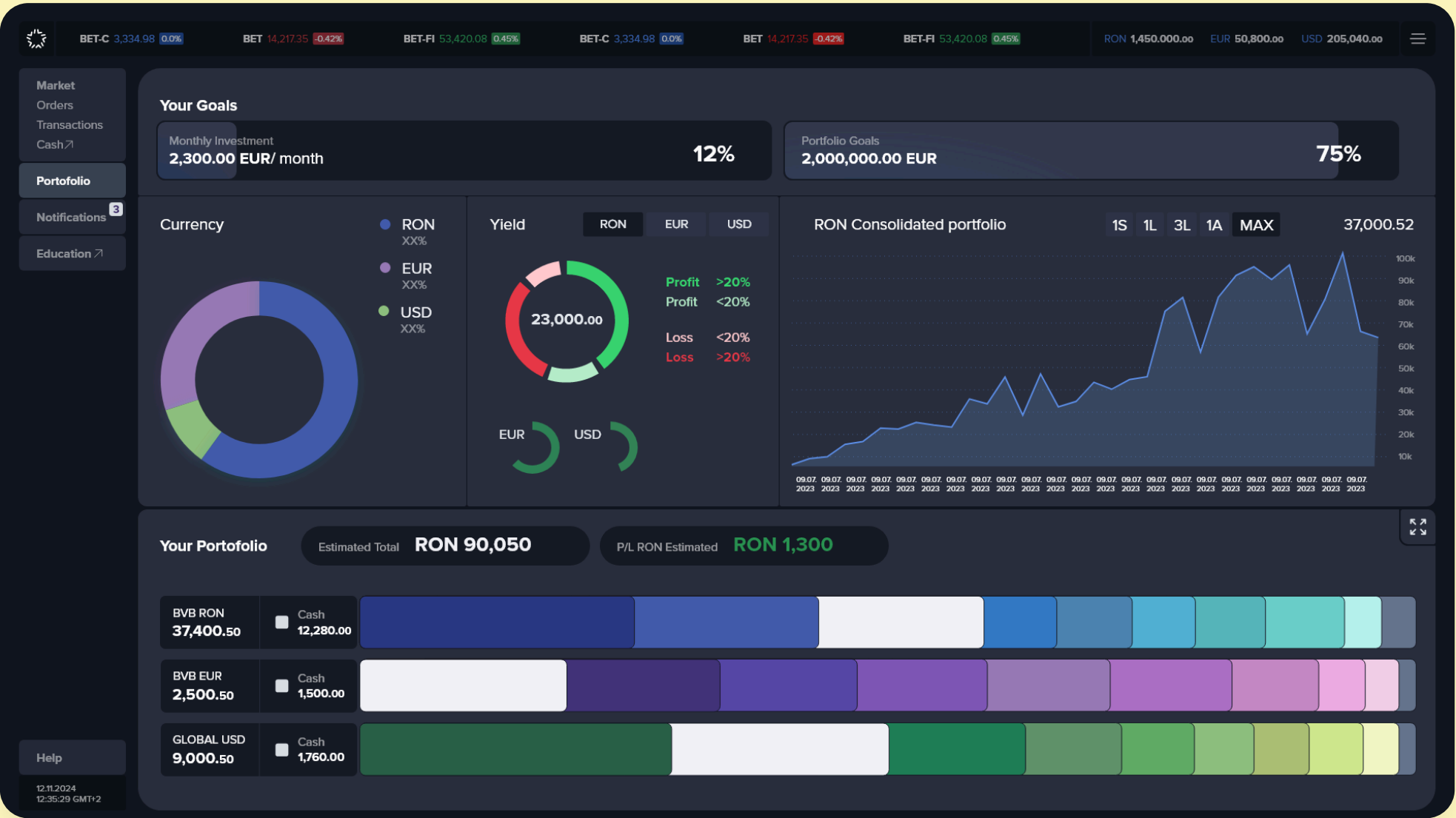
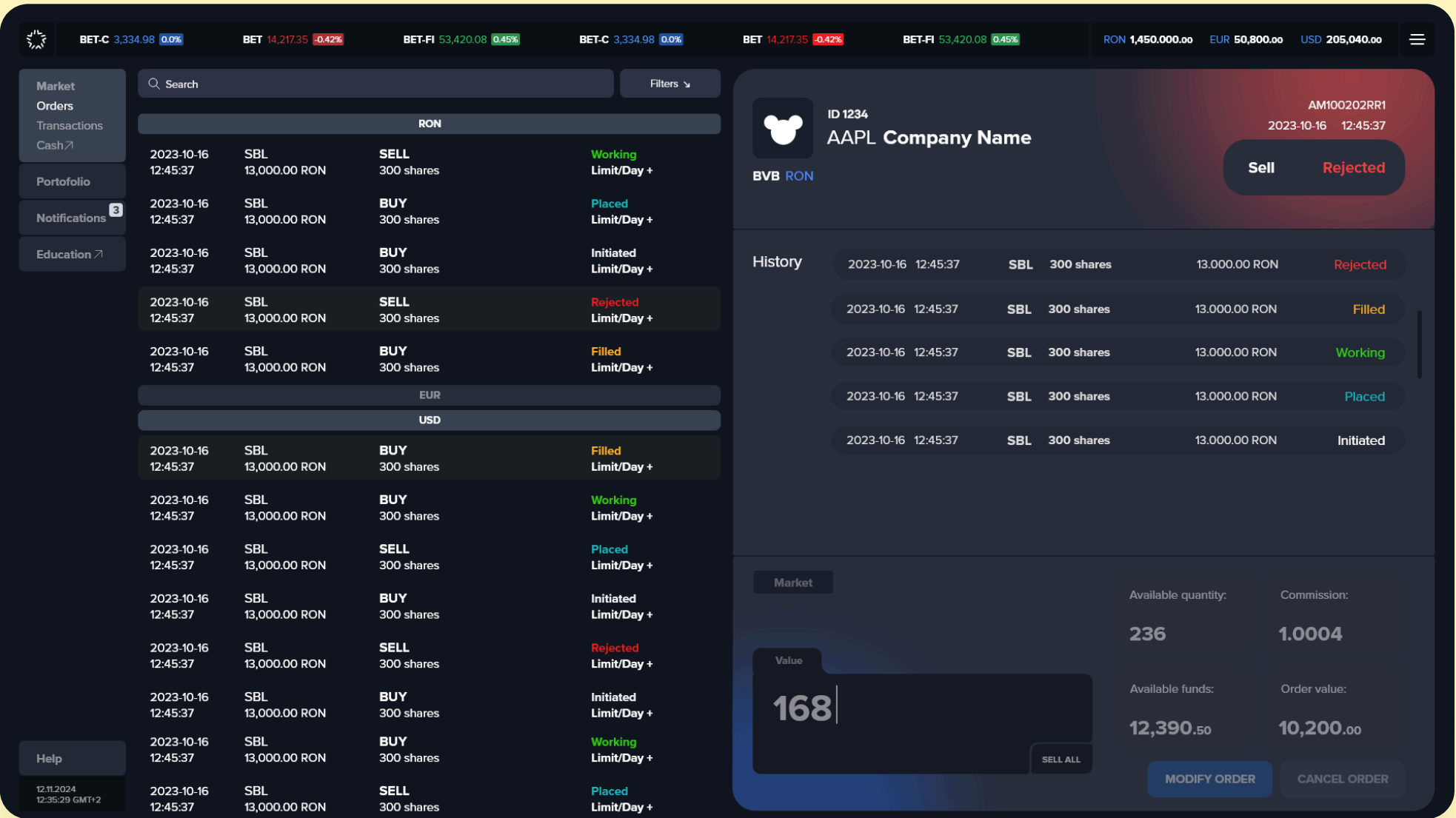
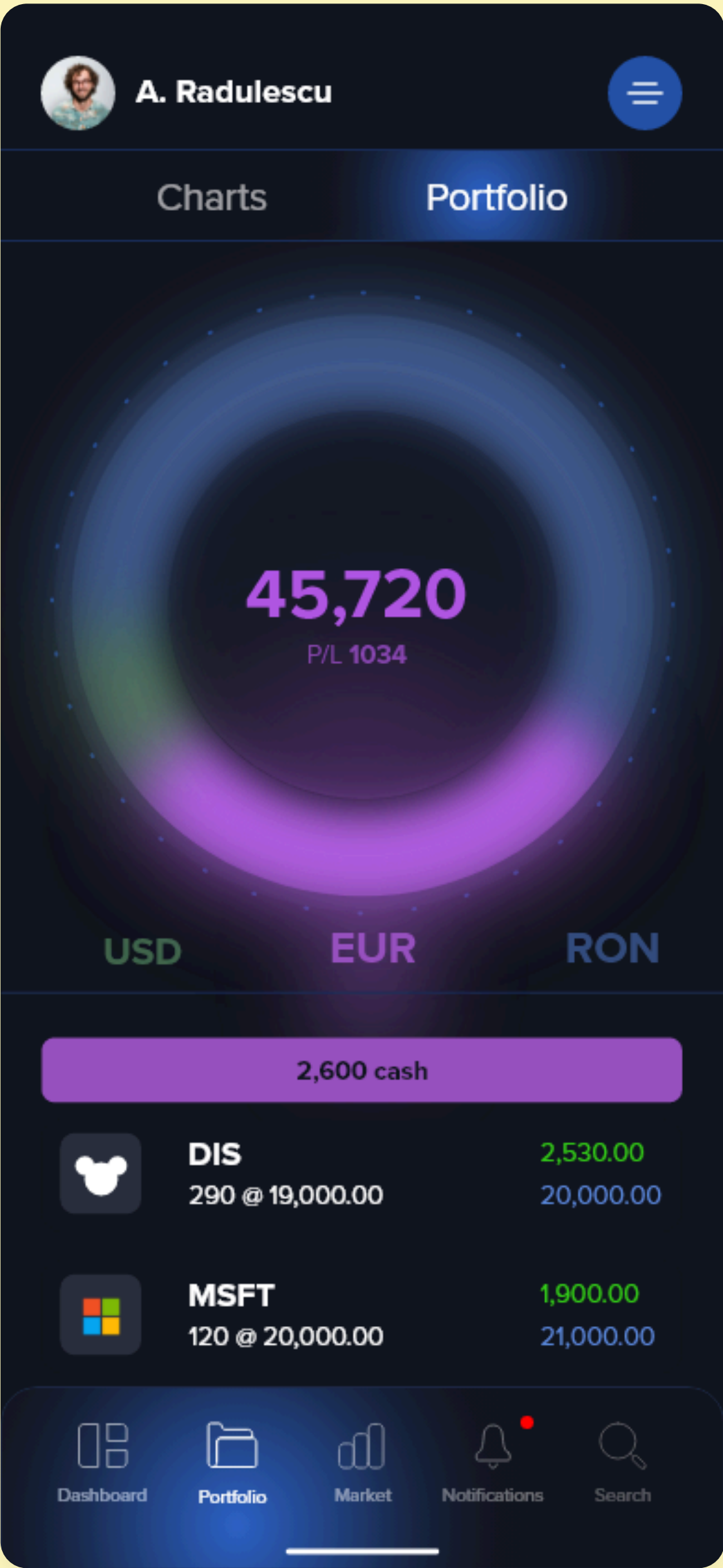
Key flows: from onboarding and authentication to order entry, trade confirmation, and watchlist management are seamless, and alerts, notifications, and settings deliver intuitive, accessible interactions.





Interactive Prototyping

This slide showcases our interactive web and mobile prototypes, simulating real user interactions to validate flows, uncover usability insights, and gather stakeholder feedback ahead of development.



3. Validation Phase

This phase ensures the product is usable, valuable, and ready for development.

Usability Testing

- Conduct moderated and unmoderated tests with target users.
- Identify friction points and areas for improvement.

Design Iteration

- Refine designs based on feedback and test results.
- Prioritize changes that enhance clarity, efficiency, and trust

Developer Handoff

- Prepare design specs, assets, and documentation.
- Collaborate with dev teams to ensure pixel-perfect implementation.

Final Review & Sign-Off

- Align with stakeholders on final deliverables.
- Confirm readiness for development and launch

Usability Testing

We ran both moderated and unmoderated sessions with target users to uncover pain points and friction in key flows. Insights around navigation, order entry, and notifications drove targeted refinements—streamlining interactions and boosting overall usability.

Design Iteration

We iteratively refined screens based on usability insights and stakeholder feedback, prioritizing changes that boost clarity, streamline task efficiency, and reinforce user trust throughout the trading journey.



Developer Handoff

We prepared detailed design specifications, exported assets, and compiled thorough documentation, then partnered closely with development teams to ensure pixel-perfect implementation and a seamless user experience.



Final Review & Sign-Off

We aligned with stakeholders on all final deliverables: confirming scope, feature set, and success criteria.

We finally ran comprehensive readiness checks to ensure designs are development-ready and primed for a smooth launch.



Launch



Forbés Abonare

Investimental Nova este o aplicație desktop și mobile-native, destinată investitorilor de retail. Aplicația facilitează accesul la tranzacții și eficientizează gestionarea portofoliilor de investiții.

Investitorii își pot seta și urmări obiective financiare, pot crea liste multi-monedă personalizate cu companiile preferate, pot tranzacționa fracționar și în afara orelor standard pentru piața din SUA și au previziunea costurilor, dar și acces la rapoarte centralizate, notificări și alerte referitoare la oportunități de investiții, potrivit companiei.

„Investimental Nova integrează acum bursa românească și cea americană. În curând vom oferi acces și la principalele piețe europene în aceeași aplicație. Totodată, sistemul de alimentare și retragere a fondurilor, unic în România, va fi implementat direct în platformă. Principala noastră preocupare



20 DE 20 DE ANI ÎMPREUNĂ

Investimental, primul broker autorizat de ASF pentru tranzacții bursiere pe BVB în ultimii 16 ani, lansează Investimental Nova, o aplicație desktop și mobile-native, destinată investitorilor de retail, care facilitează accesul la tranzacții și eficientizează gestionarea portofoliilor de investiții.

În noua aplicație, investitorii își pot seta și urmări obiective financiare, pot crea liste multi-monedă personalizate cu companiile preferate, pot tranzacționa fracționar și în afara orelor standard pentru piața din SUA și au previziunea costurilor, dar și acces la rapoarte centralizate, notificări și alerte referitoare la oportunități de investiții.

Principalele opțiuni din aplicația Investimental

„Investimental Nova integrează acum bursa românească și cea americană. În curând vom oferi acces și la principalele piețe europene în aceeași aplicație. Totodată, sistemul de alimentare și retragere a fondurilor, unic în România, va fi implementat direct în platformă. De la lansarea Investimental, am investit peste 10 milioane de lei în produse, soluții și servicii care au ca scop facilitarea accesului la piețele de capital, simplificând acest proces”, a declarat Mihaela Biciu, CEO al Investimental.

Citeste si:

- » **Investitorii răsufă ușurați... o zi: Leul, bursa și ROBOR își revin după alegeri**
- » **Dividende 2025: Ce venituri pasive poți avea anul viitor pe bursa românească**
- » **Comisioane la titluri de stat Fidelis: Cu cât te taxează brokerii și băncile**



Cromatic Studios