

# WEB-BASED TOOL DESIGN

# PORTFOLIO CREATOR & EDITOR

A Morningstar Project 2019



## THIS PROJECT

This project is to design a tool for portfolio creation, and it should also allow a shared use for portfolio editing. This portfolio creator/editor is a function in Morningstar Direct.

## MY ROLE

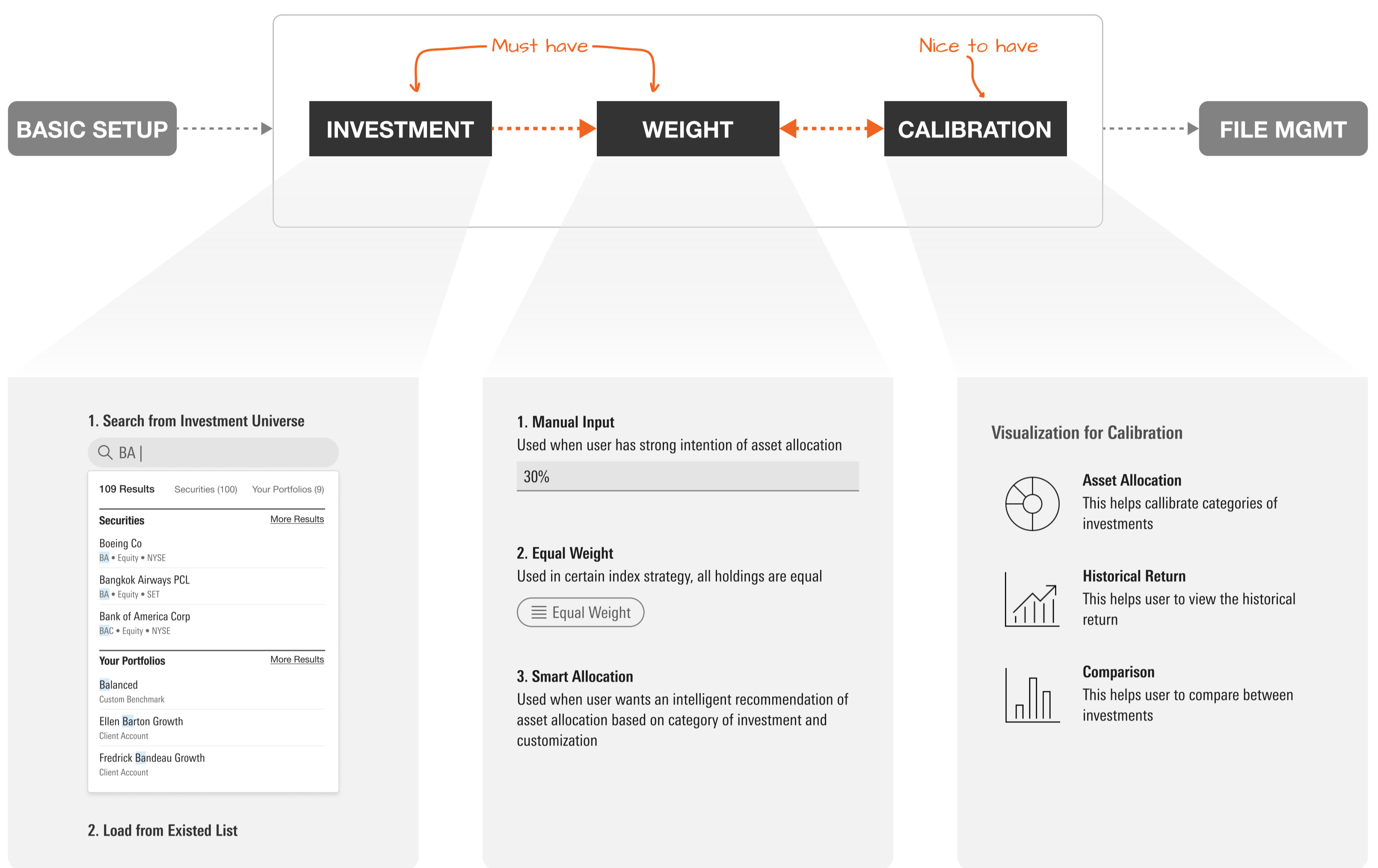
In this project, I was design lead, partnering with a visual designer and overseeing the design quality. It took about 3 months to complete. The challenge of design is how visualization aids the creation.

## THE USER

Portfolio strategist, responsible for constructing, monitoring and evangelizing proprietary model portfolios which represent the firm's best thinking for a specific strategy.

## USER FLOW

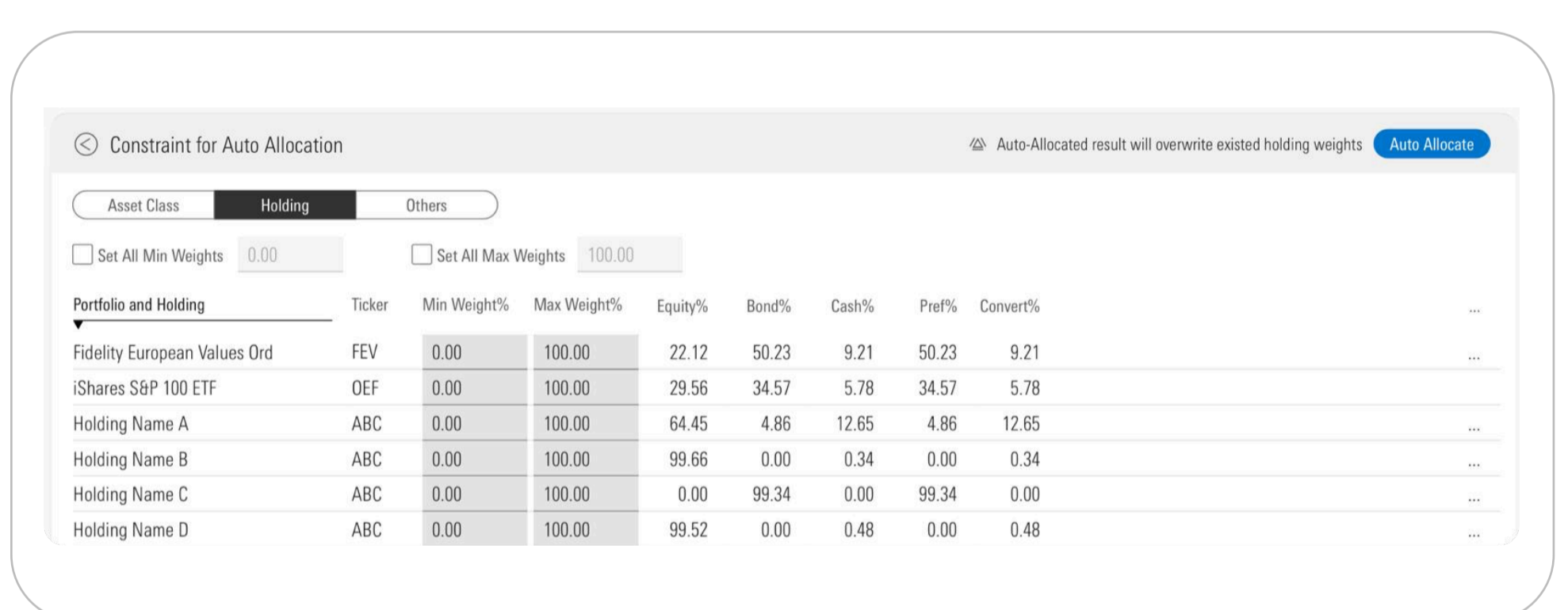
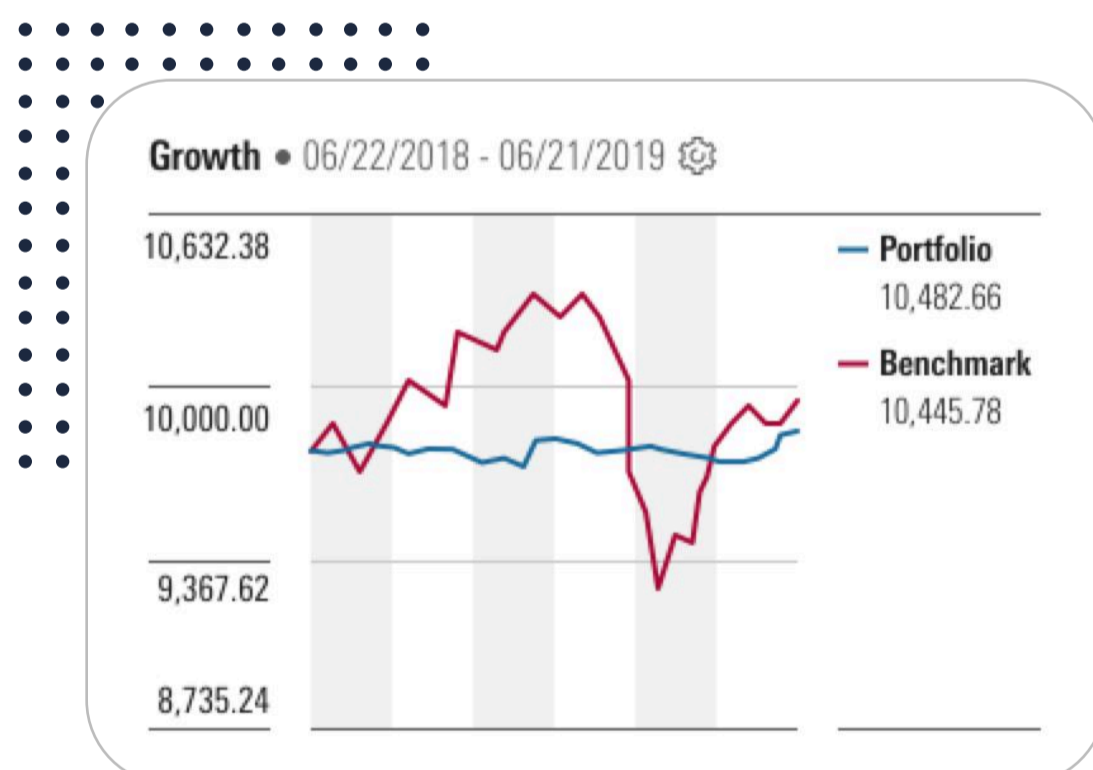
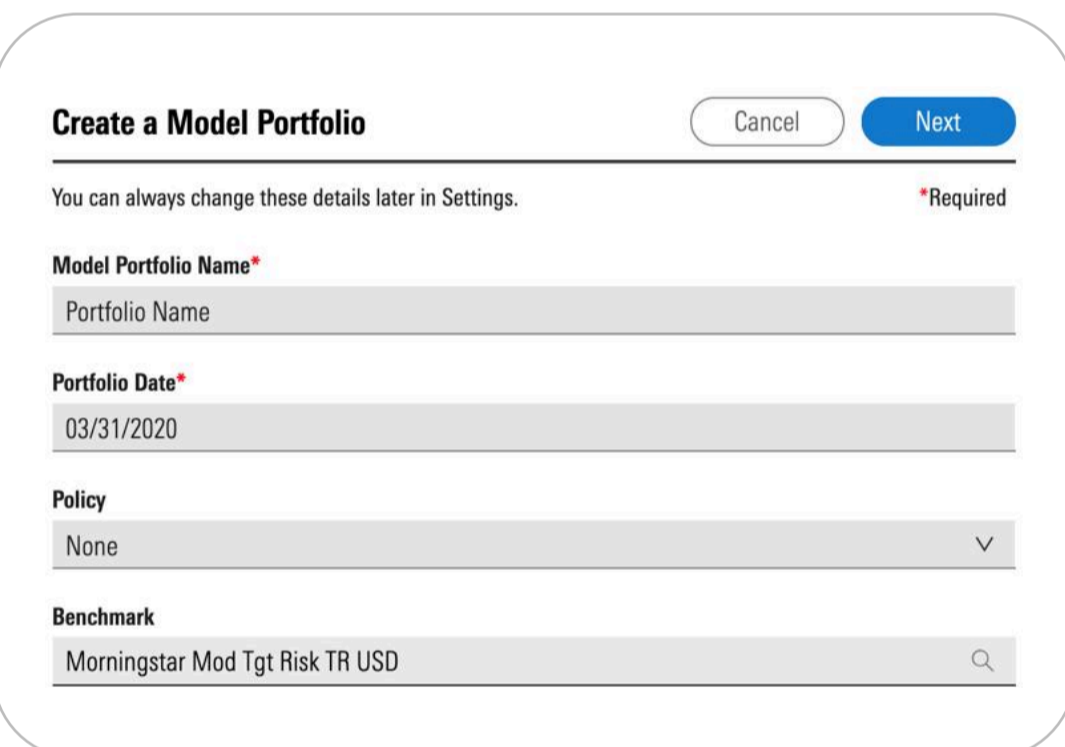
An portfolio is a set of financial assets owned by an investor that may include bonds, stocks, currencies, cash and cash equivalents, and commodities. Further, it refers to a group of investments that an investor uses in order to earn a profit while making sure that capital or assets are preserved.



## FLOW OF SMART ALLOCATION



## KEY SCREENS



## SCENARIO SIMULATION

