

# UXD DESIGN VISUALIZATIONS 1.0

Nectar Financial AG

by Robert Santore





## Category A - Visualizations

Option 1: Restrictions View

Option 2: Winners/Losers View





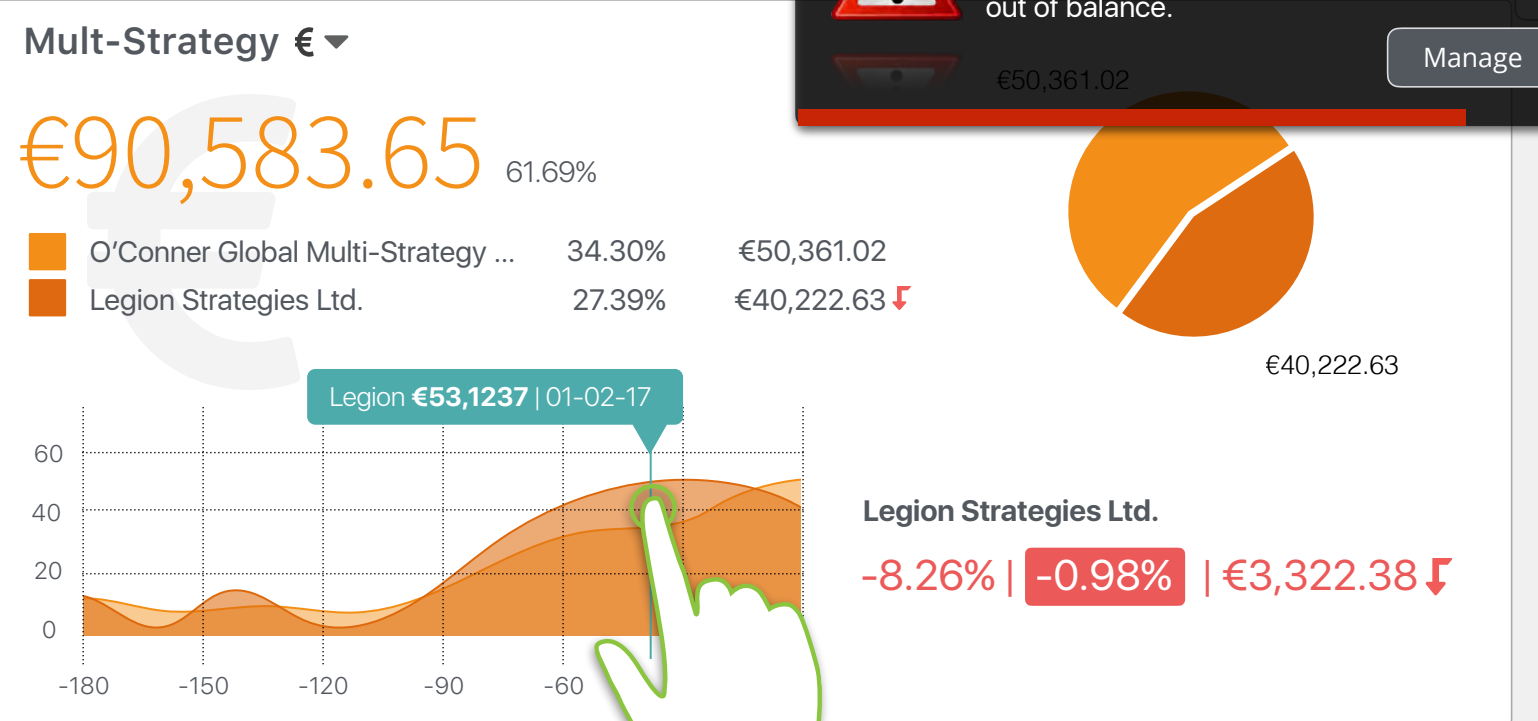
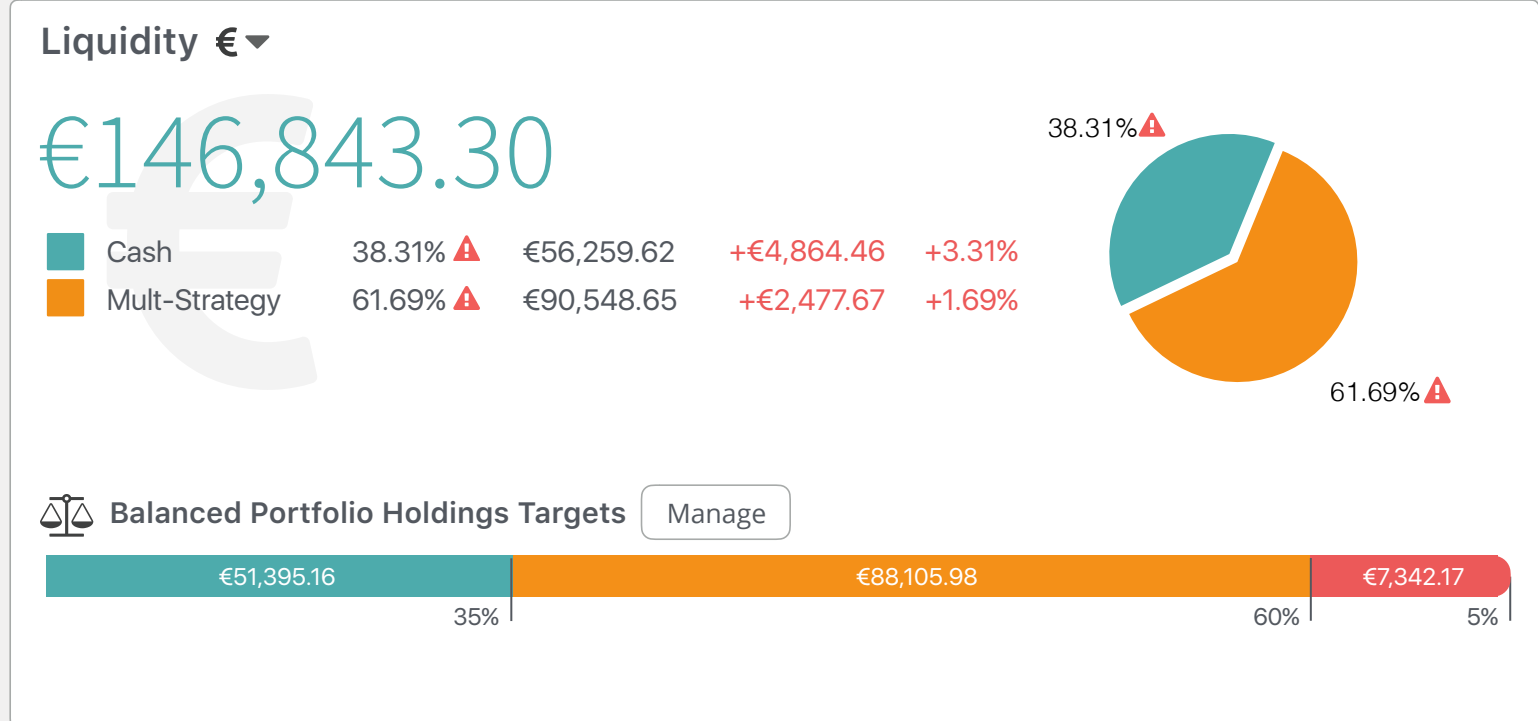
nectar

Welcome Robert  
Hurricane Capital, Inc.

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### Portfolio & Postions



**ALERT:** Your portfolio holdings threshold is out of balance.

Manage

### Portfolio

Show 10 entries

Excel PDF Filter... Advanced Filtering Column Prefs

Position	Amount w/un	Currency	Var. & S.I.	Contr. YTD	Inst. Per	Weight	Thresholds	FX	Value (Ai, PF)	Alert
▼ Liquidity						38.31%			€56,259.65	
▼ Cash						38.31%	+3.31%   €4,864.46		€56,259.65	
\$ USD Cash	0.00	USD	0.00%	0.03%	0.00%	0.00%		0.8726	0.00	
€ EUR Cash	56,259.62	EUR	0.00%	0.00%	0.00%	38.31%	+3.31%   €4,864.46	1.0000	€56,259.62	
F CHF Cash	0.03	CHF	0.00%	0.00%	0.00%	0.00%		0.9184	0.03	
▼ Alternative Investments						61.69%	+1.69%   €2,464.67		€90,583.65	
▼ Multi-Strategy						61.69%	+1.69%   €2,464.67		€90,583.65	
HF O'Conner Global Multi-Strategy ...	28.26	EUR	0.71%	-0.11%	-0.89%	34.30%		1.000	€50,361.02	
FOH Legion Strategies Ltd.	25.434	USD	-8.26%	-0.98%	-4.33%	27.39%		0.8769	€40,222.63	

Showing 1 to 5 of 5 entries



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Enter Global Keyword...

Alerts/Messages 4 Log-out

### Portfolio & Postions

#### Liquidity €

€146,843.30

38.31% ▲ €56,259.62 +€4,864.46 +3.31%

61.69% ▲ €90,548.65 +€2,477.67 +1.69%

Balanced Portfolio Holdings Targets Manage

€51,395.16 (35%) | €88,105.98 (60%) | €7,342.17 (5%)

#### Mult-Strategy €

€90,583.65 61.69%

- O'Conner Global Multi-Strategy ... 34.30% €50,361.02
- Legion Strategies Ltd. 27.39% €40,222.63

Legion €53,1237 | 01-02-17

Legion Strategies Ltd.  
-8.26% | -0.98% | €3,322.38

**ALERT:** Your portfolio holdings threshold is out of balance.

€50,361.02

Manage

Portfolio

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Clicking this button takes user to screen to manage investment thresholds

Portfolio balance threshold target displays what the portfolio values should be based on user settings

Total Liquidity KPI

TTL Cash

TTL Alternative Investments

Portfolio split

Holdings split. User could mouser over and get %.

User may select currency from drop down . This information displayed in this KPI would reflect selection

Gritter notification alerting the user his portfolio investments need to be addressed based on the users default settings.

Clicking this button takes user to screen to manage investment thresholds

Timed progress bar - when loads completely, notification fades away

Expand/ reload / collapse. Handy if other tiles are positioned below this grid container

Enter Global Keyword...

Alerts/Messages 4 | Log-out

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### Portfolio & Postions

**Liquidity €**

€147,018.28

Current portfolio value.

User's settings are 35% Cash / 60% Alternative Investments. Investments are out of line with settings - warnings are displayed until corrected

Cash	38.31%	€56,259.62	+€4,864.46	+3.31%
Multi-Strategy	61.69%	€90,548.65	+€2,477.67	+1.69%

Balanced Portfolio Holdings Targets

Cash	35%	€51,395.16
Alternative Investments	60%	€88,105.98
Other	5%	€7,342.17

**Multi-Strategy €**

€90,583.65

User may select currency from drop down . This information displayed in this KPI would reflect selection

O'Conner Global Multi-Strategy ...	34.30%	€50,361.02
Legion Strategies Ltd.	27.39%	€40,222.63

Holdings split. User could mouser over and get %. Helpful when more than 2 assets are listed

Indicates downtrend / loss

Legion Strategies Ltd.

-8.26% | -0.98% | €3,322.38

mouseover gives historical view of selected investment. Legion is down "today" -8.26% / €3,322.38 and weights the entire portfolios losses at -0.98%

Portfolio

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F CHF Cash	175.01	CHF	0.00%	0.00%	0.00%	0.00%		0.9184	175.01	
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Portfolio balance % & value warning based on portfolio balance threshold settings

Since we are only holding cash in Euros - alert is listed

User could set the option to split % of total cash held - if so it would be listed if threshold is violated

Percent of threshold error - in this case multi-strategy holdings are +1.69% over the set % of 60% for these positions

Currency value over set threshold - this about could be moved to another investment group to bring position back into compliance

Currency value & % of error displayed

Portfolio balance threshold target displays what the portfolio values should be based on user settings

Investment split of the whole and correct value based on user settings

When a parent position is classed -alert displayed user until corrected

Collapse/expand control for menu

