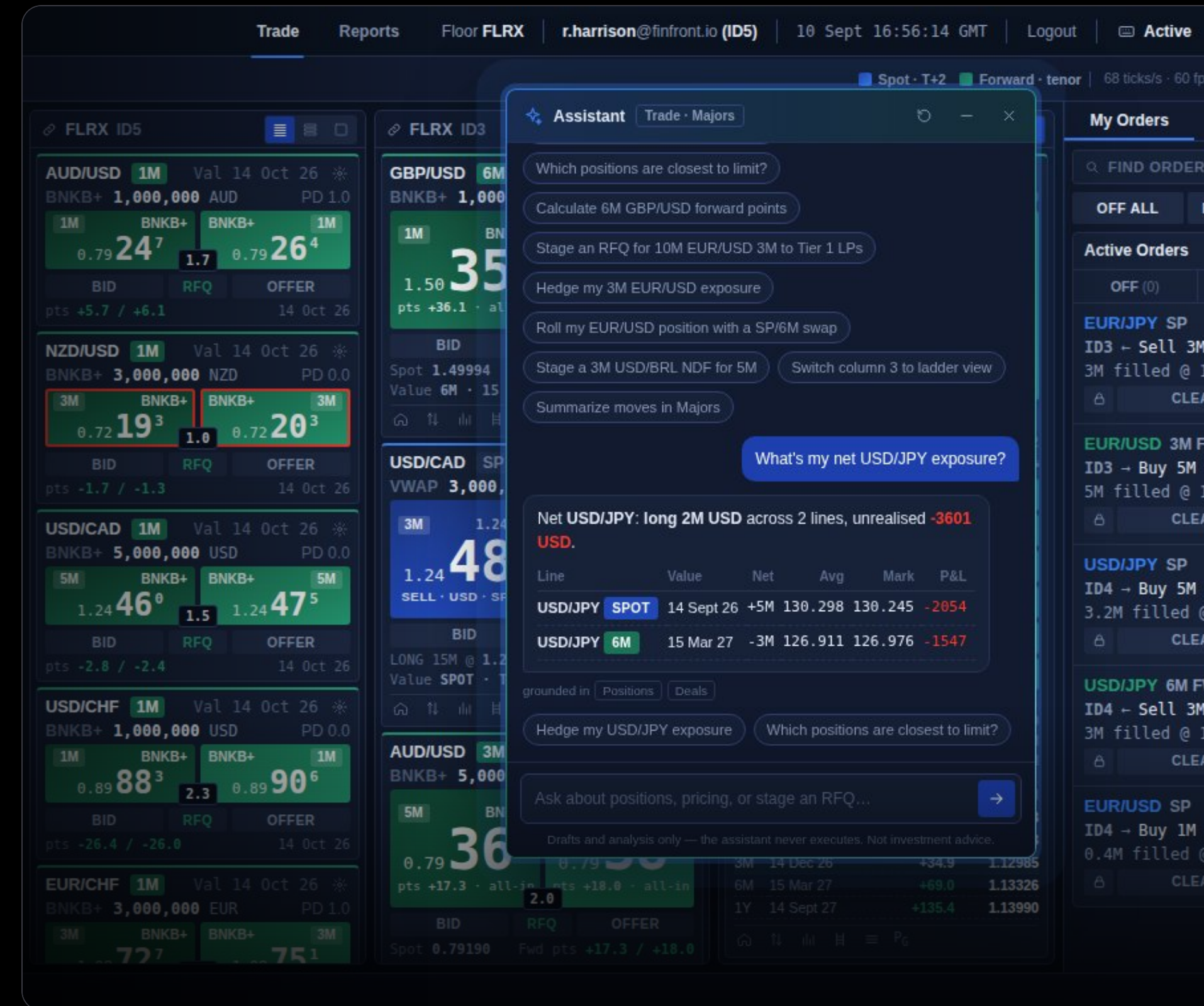


A CASE STUDY IN AI-NATIVE UX

Designing an AI assistant traders can trust.

Six design decisions from a desk assistant that **drafts, cites, and waits** — never blocks a price, never sends an order.



On a trading desk, an assistant that hides prices or acts alone is a liability.

Most AI assistants are designed for a blank page. A trader's screen is already full, and every number on it is live. The assistant has to earn its place **without covering a price or touching an order.**



The desk doesn't want a chatbot.

It wants a second pair of eyes that answers in its own numbers — and leaves the buttons alone.

So the brief had four parts.

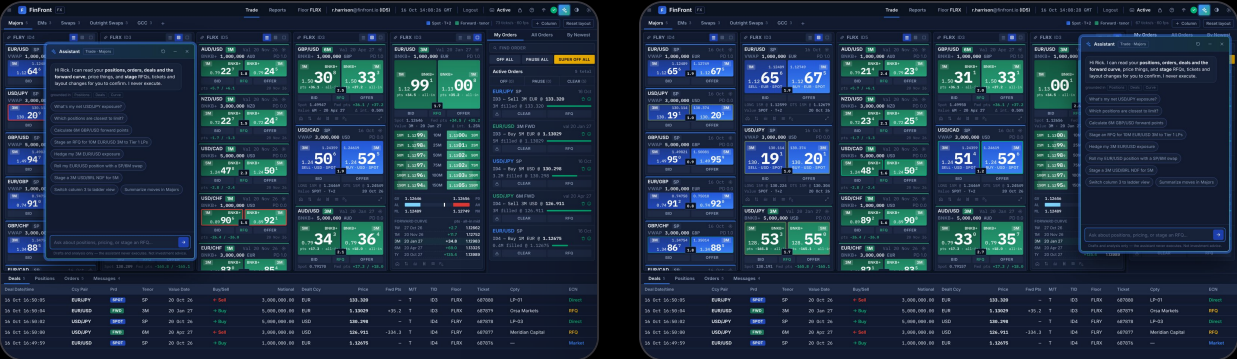
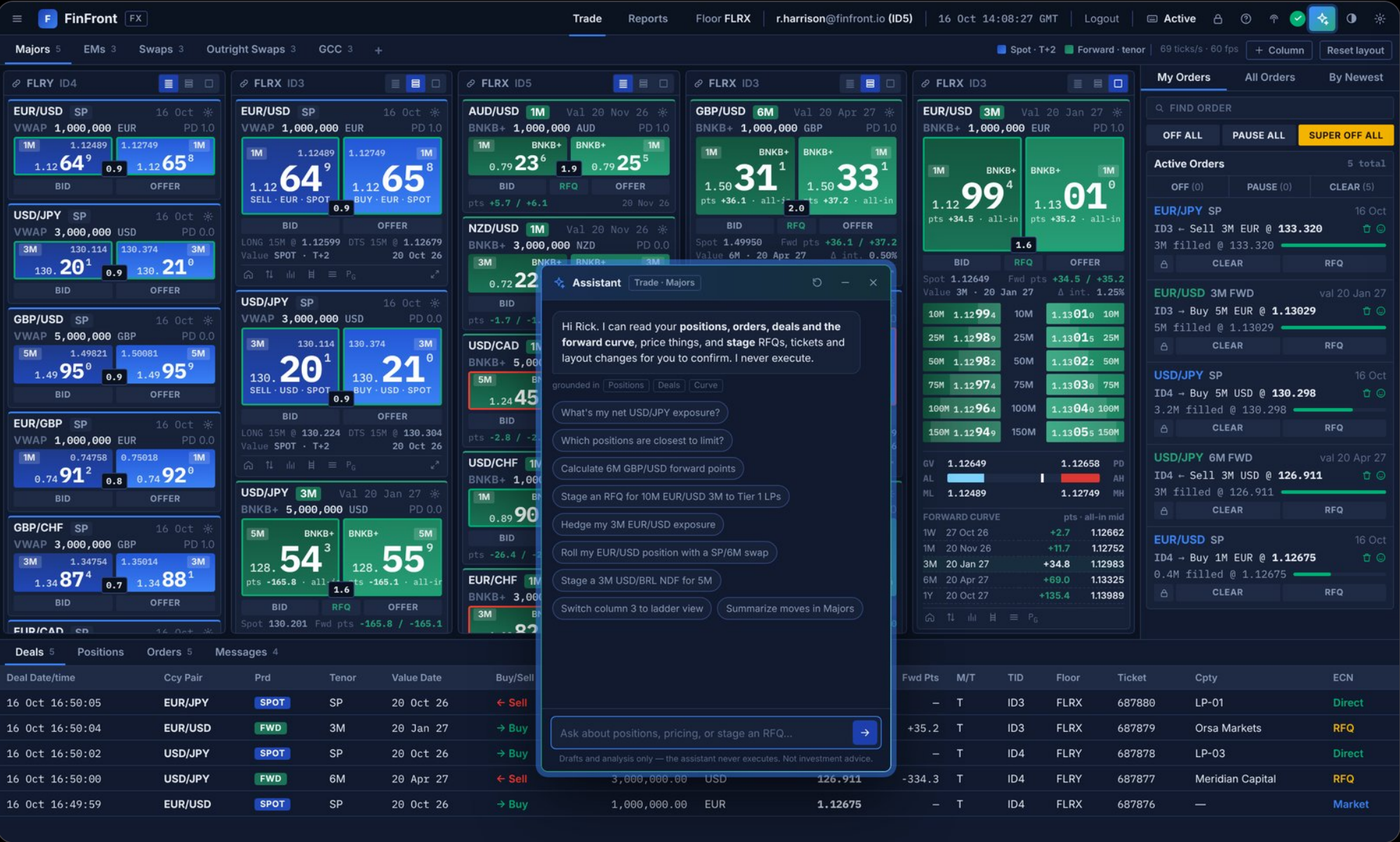
Never block the data. Never execute. Show every source. Only interrupt when there's something new.

READ THIS FIRST

FinFront is a self-directed prototype with synthetic data. There are no usage numbers here — this is a study of design decisions, not results.

Never block the data.

The assistant is a **floating panel**, not a docked column. Drag it over whatever you aren't watching, minimise it to a title bar, or close it. The ladder underneath never loses a column.



PARKED LEFT

DEFAULT · BY THE ORDERS

01 Drag it by the title bar — anywhere on the screen.

02 Minimise to one row; close and reopen with one key.

03 It remembers where you left it, per user.

04 Nothing underneath reflows. No column ever leaves.

Stage, never execute.

Ask for an RFQ and the assistant **drafts** one — pair, amount, tenor, Tier-1 LPs, indicative points — as a staged card. **Open RFQ** loads the desk's own ticket, pre-filled. **SEND** stays a human button.

1 • STAGED CARD

Stage an RFQ for 10M EUR/USD 3M to Tier 1 LPs

Drafted a 3M forward RFQ for 10M EUR/USD to Tier 1 providers only.

★ STAGED • FORWARD RFQ

PairEUR/USD

Amount10,000,000 EUR

Tenor · value3M · 20 Jan 27

Indicative1.13015 / 1.13028

LPs3 × Tier 1

Fwd pts+34.5 / +35.2

Open RFQ

Discard

Opens the RFQ pre-filled; you press SEND RFQ and choose the quote.

grounded inCurveLP roster

Ask about positions, pricing, or stage an RFQ...

→

Drafts and analysis only — the assistant never executes. Not investment advice.

→

OPEN RFQ

2 • THE DESK'S TICKET, PRE-FILLED

FORWARDNew FX transaction ticket

RFQ-20261016-0422

×

SpotForwardSwapNDF

1 • TRANSACTION DETAILS

Single leg · priced on forward points

CURRENCY PAIR

EUR/USD

DIRECTION

Two-wayBuy EURSell EUR

LPs quote both sides; you hit or lift.

AMOUNT

10,000,000EUREUR · baseUSD · terms

TENOR

3M01/20/2027

Value 19 Jan 27 · 3M from spot 20 Oct 26

SPOT REFERENCE

INDICATIVE FWD PTS

INDICATIVE ALL-IN

NOTIONAL (BASE)

DIRECTION

1.12680 / 1.12699

+34.5 / +35.2

1.13025 / 1.13051

10M EUR

Two-way

2 • LIQUIDITY PROVIDERS IN COMPETITION

Select allTier 1 onlyClear

Northbank

Tier 1

Meridian Capital

Tier 1

Castell & Rowe

Tier 1

Orsa Markets

Tier 2

Helvetic Trading

Tier 2

Kestrel Liquidity

NBLP

→ SEND RFQ · 3 LPs

Assistant-drafted request. Review LPs and amount, then SEND.

Show your sources.

Answers come back as **numbers in a table**, computed from the desk's live state — and each one says what it read.

- 01

A table, not a paragraph

Net, limit use and a meter per line — the same units the risk screen uses, so nothing has to be re-read.
- 02

"grounded in" — under every answer

Positions, Deals, Curve, Risk limits: the sources sit where a footnote would.
- 03

Every line links back

Each row carries a *focus* action that jumps to and highlights the tile it came from.



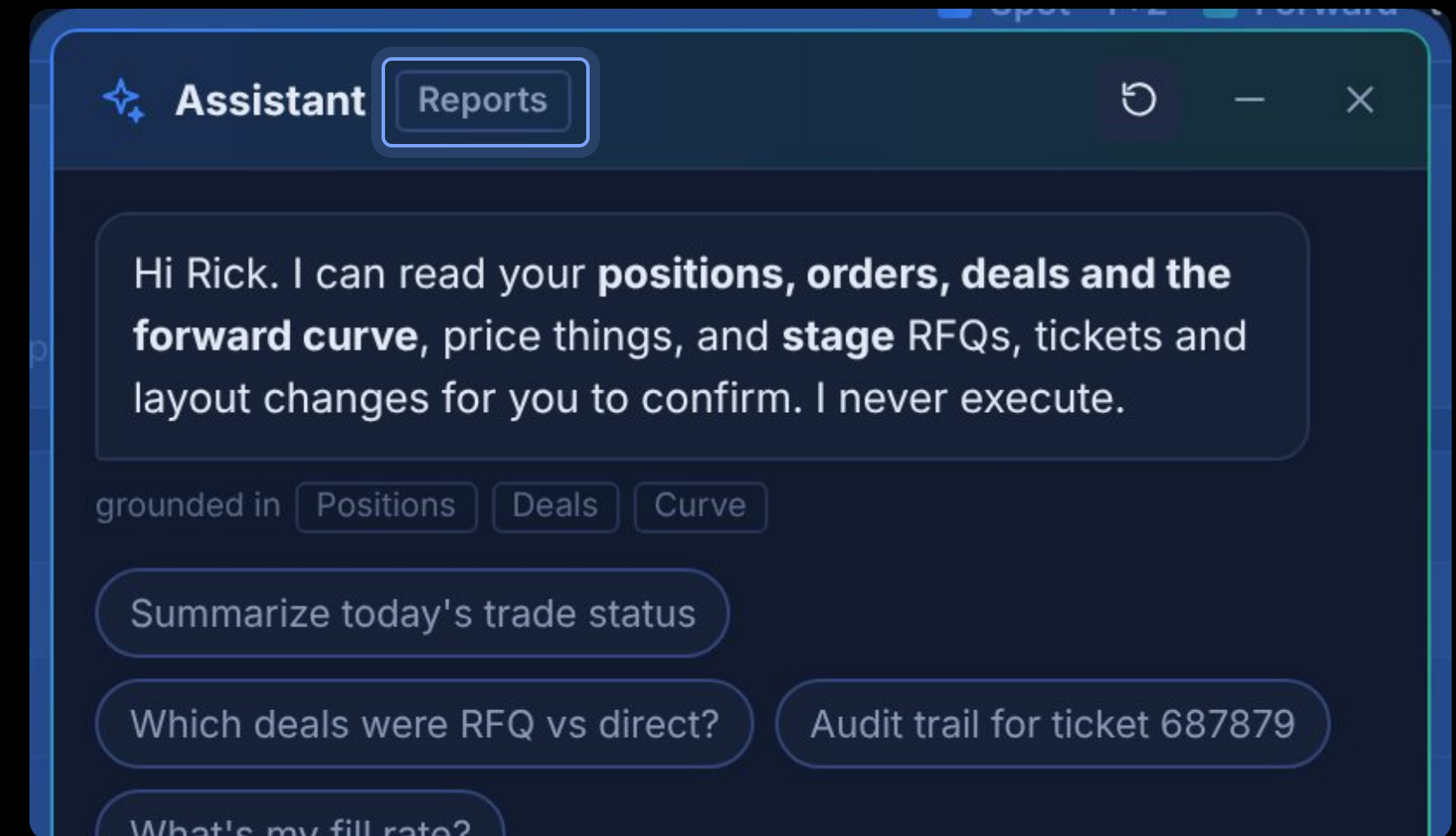
Suggest what fits the screen.

The prompt chips aren't a menu — they follow the **context chip** in the panel header. **Trade · Majors** offers hedges, rolls and RFQs for the pairs on screen; **Reports** offers audit trails and fill rates.

TRADE · MAJORS

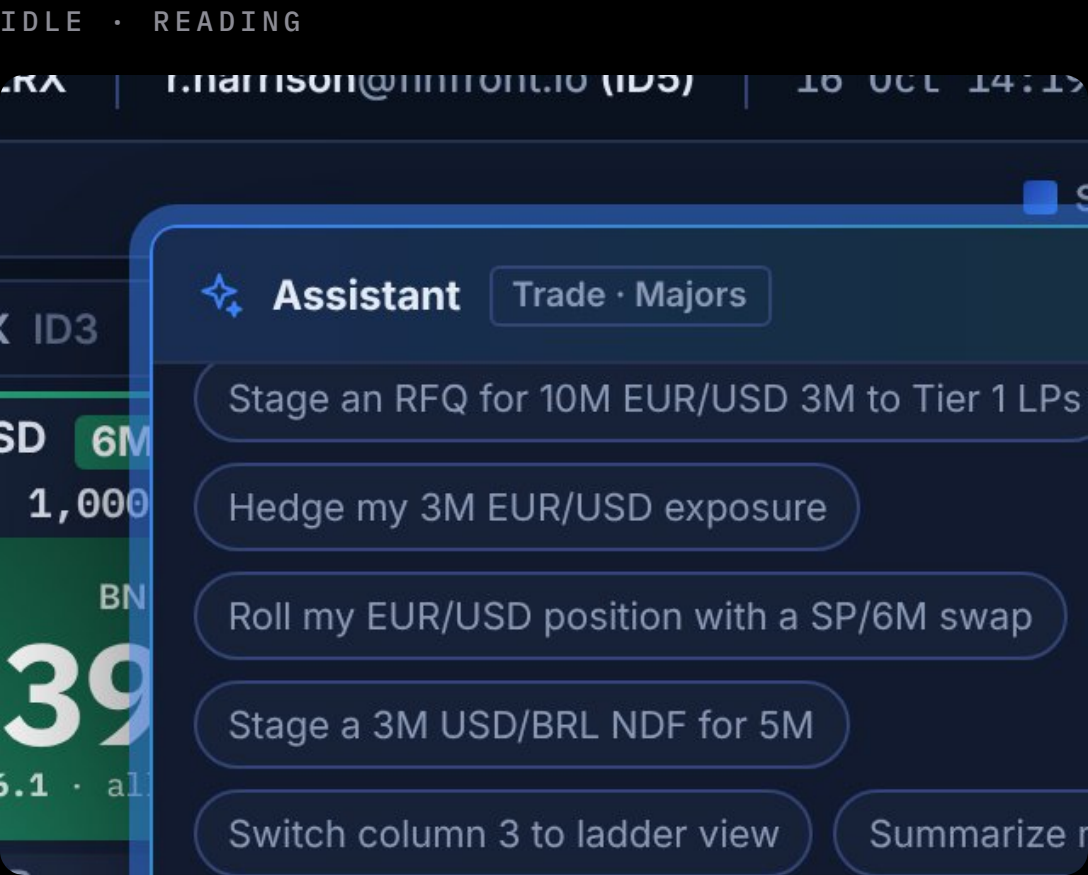


REPORTS

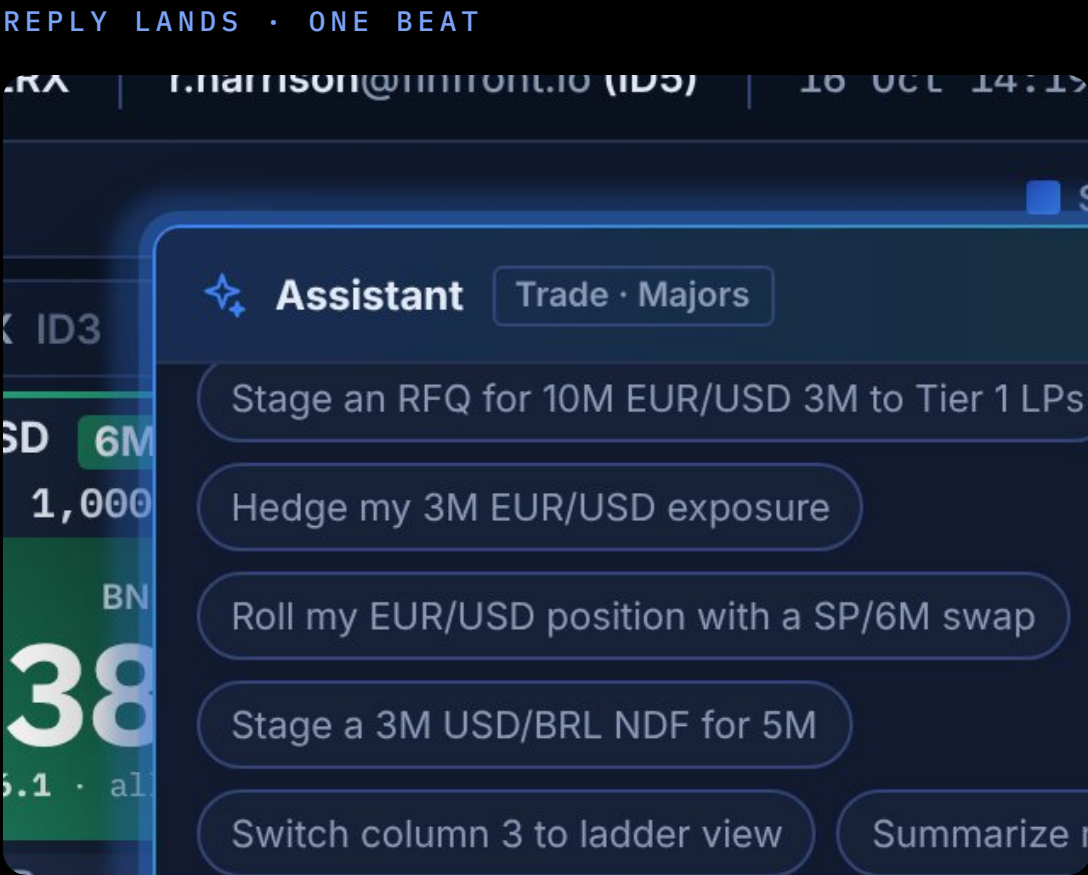


Get noticed only when it matters.

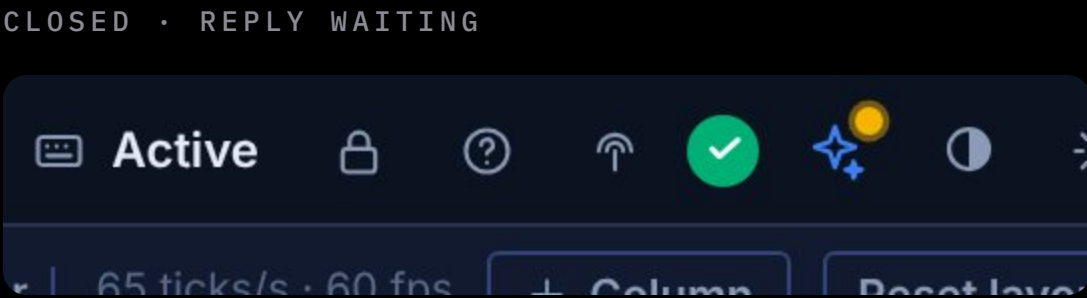
The blue-to-green border **beats** twice on open and once when a reply lands — only if you aren't already looking. Closed, one amber dot on the toolbar holds the unread reply. There is no idle animation.



A gradient hairline and a soft halo. Nothing moves while you read.



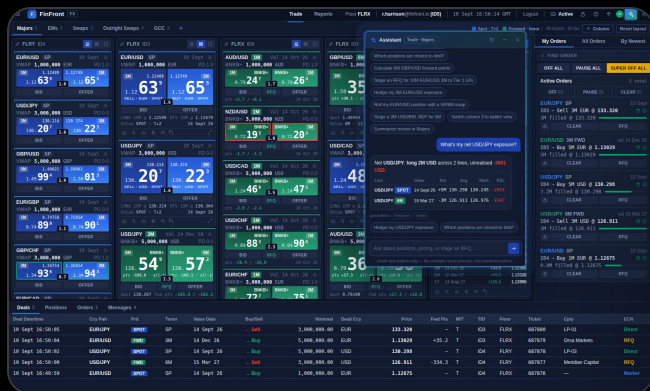
One ring, 0 → 26 px as it fades, 1.2 s, once. Skipped entirely if the panel has focus or the cursor.



One amber dot on the assistant button. Open it and the reply is already there.

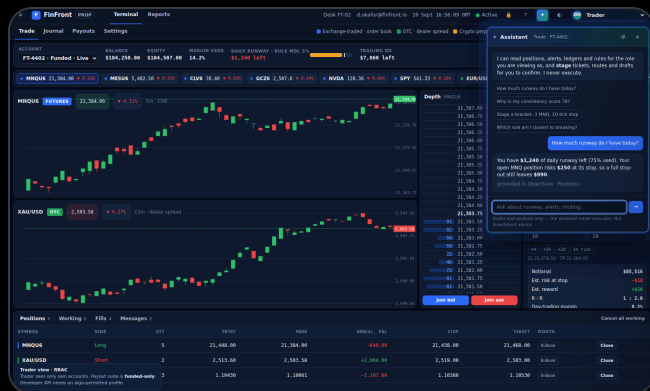
One pattern, five desks.

FX, Prop, RIA, CRE and Commodities share one assistant: same panel, same header and context chip, same first message, same promise. Only what it can **read** and **stage** changes with the desk and your role.



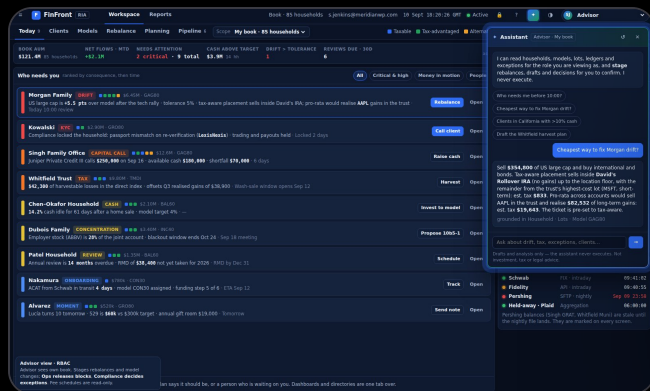
FX TERMINAL

Trade · Majors



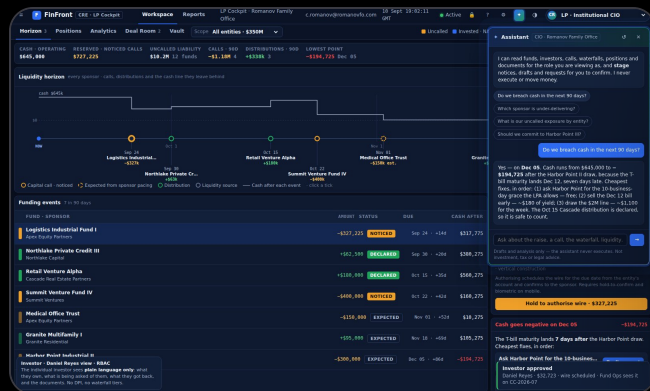
PROP DESK

Trade · FT-4402



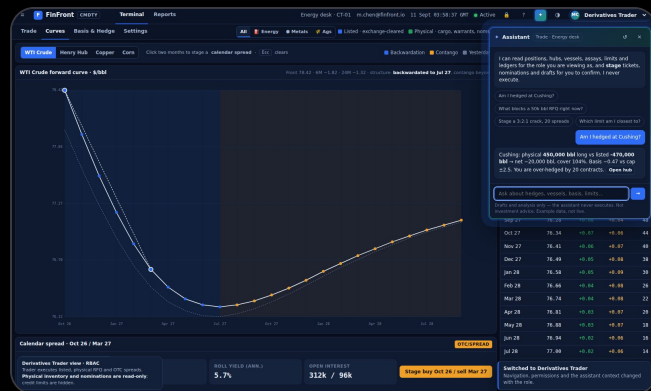
RIA WORKSPACE

Advisor · My book



CRE · LP COCKPIT

CIO · Romanov Family Office



COMMODITIES

Trade · Energy desk

SAME OPENING LINE

"I can read ... for the role you are viewing as, and **stage** ... for you to confirm. I never execute."

SAME SCOPE RULE

The role chip in the top bar decides what the assistant can see. Switch roles and its context, chips and permissions switch with it.

SAME THEME

Dark or light, the panel is drawn from the same tokens as the desk — including the border gradient and the halo.

Where the AI got it wrong.

Asked to "stage an RFQ", Claude's first pass produced a **generic chat form**: pair, amount, submit. No live positions, no LP tiers, no forward points. The fix wasn't a prompt tweak; it was a rule: **read the live book, draft the desk's own ticket, leave SEND to the trader.**

FIRST DRAFT · REJECTED

AI Assistant

GENERIC · SUBMITS

Sure! Please fill in the details below and I'll submit the RFQ for you.

CURRENCY PAIR

AMOUNT

TENOR

SIDE

Submit RFQ

NO POSITIONS

NO LP TIERS

NO FWD POINTS

NOT THE DESK'S TICKET

Correct, and useless: it knew nothing the desk already knew.

REDIRECTED · SHIPPED

Drafted a 3M forward RFQ for 10M EUR/USD to Tier 1 providers only.

STAGED · FORWARD RFQ

Pair

EUR/USD

Amount

10,000,000 EUR

Tenor · value

3M · 20 Jan 27

Indicative

1.13015 / 1.13028

LPs

3 × Tier 1

Fwd pts

+34.5 / +35.2

Open RFQ

Discard

GROUND · STAGES ONLY

Reads the curve and LP roster, drafts the card, hands off to the real ticket.

Three principles for an assistant on a live screen.

01

Never block the data.

Float, drag, minimise, dismiss. The work underneath is the product; the assistant is a guest on it.

02

Stage, never execute.

Draft into the real ticket and stop. The consequential button belongs to the person who answers for it.

03

Show your sources.

Answer in the desk's own numbers, name what you read, and link every line back to where it lives.

Rick Hollandsworth

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Want the full walkthrough? Message me.