

JULY 2019

ACCESSIBILITY SURVEY ISSUES

AllianceBernstein

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UX Consultant

OVERVIEW: ACCESSIBILITY & AB'S US RETAIL SITE

- The site's accessibility is good (7/10)—and better than our competitors
- The semantic CSS strategy is generally strong and needs just small tweaks
 - But UX styles don't match up with CSS semantics
- The color palette has one major weakness, the light gray background color isn't accessible
 - Compliant for most color blindness
- No videos are compliant
 - Need to improve text descriptions, and include transcripts and closed-captioning on all
- The homepage carousel isn't compliant
- Most charts are compliant
 - One major exception is side-by-side charts such as Risk Management
- No graphs are compliant
 - Use HighCharts to create fully accessible graphs
- Great examples of accessible implementation include disneycruise.disney.go.com, jetblue.com, apple.com, amazon.com, target.com



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PRODUCT FILTERS

Products

Mutual Fund

Closed-End Fund

Managed Account

Variable Product Series

Search by Fund Name or Ticker

Filter By: **These don't read as collapsed tabs**

☐ Equities

☐ Fixed Income

☐ Multi-Asset

Share Classes: ☐ ADVISOR

☐ unchecked, checkbox

User tabs into column, reads incorrectly (see below)

☐ Equities

☐ Equities 1 of 4

User tabs right, reads incorrectly

Reads Feature, Clear Filters, Share Class [Clear Filters](#)

☐ Alternatives

Feature

Share Class

☐ Alternatives, unchecked, checkbox 4 of 4

User tabs into column and it reads correctly

☐ Feature

User tabs into column, reads incorrectly (should read as a collapsed tab)

User selects Equities and dropdown should open (doesn't always work, esp the first time)

☐ Equities

☐ Fixed Income

☐ Multi-Asset

☐ Alternatives

Styles

☐ Core

☐ Growth

☐ Value

☐ Core, unchecked, checkbox 2 of 14

Users tabs into dropdown and it reads correctly

Asset Classes: ☐ MULTI-ASSET

Asset Classes: ☐ MULTI-ASSET

☐ heading level 6 Asset Classes:

☐ MULTI-ASSET

Tags are unusable since there is no indication that they are interactive buttons—users will just be confused



PRODUCT SECONDARY TABS & JUMP NAV

Showing 374 Results

Toggle works, but it isn't identified as a toggle in VoiceOver (though it is for PCs)

Daily Pricing & Yields

Performance

Literature

Month End as of 06/30/2019

Quarter End as of 06/30/2019

Jump nav doesn't work

Benchmark:

ON

OFF

Name	Share Class	YTD	1YR	3YR	5YR	10YR	Since Inception	Inception Date	Net Expense Ratio	Expenses Without Waiver	Expenses as of	Fee Waiver Expiration	Overall Morningstar Rating™
US Equities: Core													
AB Core Opportunities Fund	A @NAV	14.67	9.00	14.06	10.84	14.25	8.47	12/22/1999	1.09	1.11	02/28/2019	02/28/2020	★★★
	A With Sales Charges	9.78	4.37	12.41	9.89	13.76	8.23						
AB Core Opportunities Fund	B @NAV	14.58	8.81	13.87	10.63	14.01	8.19	12/22/1999	1.88	1.90	02/28/2019	02/28/2020	★★★
	B With Sales Charges	10.58	5.15	13.35	10.63	14.01	8.19						

The chart overall reads well, except it reads: Overall Morningstar Rating TM, blank—instead of reading number of stars

SEARCH

ab i

AB Income

AB Intermediate Bond

AB International Portfolio

AB International Value

AB Intermediate California Municipal Portfolio

AB Intermediate Diversified Municipal

AB Intermediate New York Municipal Portfolio

AB International Strategic Core

AB International Value ADR (SMA)

×

d

ab i

AB Income

AB Intermediate Bond

AB International Portfolio

AB International Value

AB Intermediate California Municipal Portfolio

AB Intermediate Diversified Municipal

AB Intermediate New York Municipal Portfolio

AB International Strategic Core

AB International Value ADR (SMA)

×

visited, link, AB International Portfolio 3 of 9

Search only sorta works.
The predictive results aren't shown but can be scrolled through

FUND LITERATURE TAB

Showing 75 Results

Daily Pricing & YieldsPerformanceLiterature

Select items below to download or email.

Name	Share Class	Fact Sheet	Commentary	Summary Prospectus	Prospectus	Annual Report	Semi-Annual Report	SAI
US Equities: Core								
AB Core Opportunities Fund	A	<input type="checkbox"/> PDF>		<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input checked="" type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>
AB FlexFee US Thematic Portfolio	Advisor	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input checked="" type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>
AB Select US Equity Portfolio	A	<input type="checkbox"/> PDF>		<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>
US Equities: Growth								
AB Concentrated Growth Fund	A	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>
AB Discovery Growth Fund	A	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>
AB FlexFee Large Cap Growth Portfolio							<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>
AB Growth Fund							<input type="checkbox"/> PDF>	<input type="checkbox"/> PDF>

Accordion doesn't read as a collapsed panel

Reads: Link, PDF.

The document popover can't be accessed by tabbing, only via rotor — Headings or Links

The PDF links lack labels (ie should read Summary Prospectus PDF. Right now the reader just reads out a bunch of unlabeled PDF links)

Link: <https://www.alliancebernstein.com/investments/us/fund-information.htm>?

Name	Share Class	Fact Sheet	Comr
US Equities: Core			
AB Core Opportunities Fund	A	<input type="checkbox"/> PDF>	
AB FlexFee US Thematic Portfolio			

Reader does read these correctly

Name	Share Class	Fact Sheet
US Equities: Core		
AB Core Opportunities Fund	A	<input type="checkbox"/> PDF>
AB FlexFee US Thematic Portfolio		

But in the rotor, the checkboxes and PDF links aren't labeled correctly

NULL RESULTS IN CHARTS

Showing 394 Results

Daily Pricing & Yields	Performance	Literature
------------------------	-------------	------------

As of 06/13/2019

Name	Share Class	NAV (\$)	NAV Change (%)	Change (\$)	Offer Price (\$)	YTD Performance (%)	Assets \$MM (as of 04/30/2019)	Distribution Yield (%)	Gross 30 Day SEC Yield (%)	Net 30 Day SEC Yield (%)
US Equities: Core										
AB Core Opportunities Fund	A	18.97	0.58%	0.11	19.81	12.65	265.00	--	--	--
AB Core Opportunities Fund	B	16.60	0.61%	0.10	16.60	12.54	265.00	--	--	--
AB Core Opportunities Fund	C	15.33	0.59%	0.09	15.33	12.31	265.00	--	--	--
AB Core Opportunities Fund	I	19.90	0.61%	0.12	19.90	12.81	265.00	--	--	--
AB Core Opportunities Fund	K	19.16	0.58%	0.11	19.16	12.57	265.00	--	--	--
AB Core Opportunities Fund	R	18.22	0.61%	0.11	18.22	12.47	265.00	--	--	--
AB Core Opportunities Fund	Advisor	19.63	0.62%	0.12	19.63	12.82	265.00	--	--	--
AB Core Opportunities Fund	Z	19.95	0.61%	0.12	19.95	12.84	265.00	--	--	--
AB FlexFee US Thematic Portfolio	Advisor	12.72	0.39%	0.05	12.72	20.11	87.70	--	--	--
AB Select US Equity Portfolio	A	16.47	0.55%	0.09	17.20	14.93	234.40	--	--	--

Reads: Net 30 Day SEC Yield Percent (skips the “- -”) Use N/A instead

1 2 3 4 5 6 7 8 9 10 ... NEXT >

No textual summary of contents

MORNINGSTAR RATINGS

Product Listings

Showing 394 Results

Daily Pricing & Yields		Performance				Literature							
Month End as of 05/31/2019		Quarter End as of 03/31/2019						Benchmark: <div>ON</div> <div>OFF</div>					
Name	Share Class	YTD	1YR	3YR	5YR	10YR	Since Inception	Inception Date	Net Expense Ratio	Expenses Without Waiver	Expenses as of	Fee Waiver Expiration	Overall Morningstar Rating™
US Equities: Core													
AB Core Opportunities Fund	A @NAV	8.31	3.71	11.15	9.83	13.72	8.19	12/22/1999	1.09	1.11	02/28/2019	02/28/2020	★★★
	A With Sales Charges	3.69	-0.68	9.55	8.89	13.23	7.95						
AB Core Opportunities Fund	B @NAV	8.20	3.48	10.94	9.61	13.48	7.91	12/22/1999	1.88	1.90	02/28/2019	02/28/2020	★★★
	B With Sales Charges	4.20	0.01	10.41	9.61	13.48	7.91						
AB Core Opportunities Fund	C @NAV	7.99	2.90	10.32	9.04	12.92	7.42	12/22/1999	1.84	1.87	02/28/2019	02/28/2020	★★★

Reads: Overall Morningstar Rating, TM, blank

Needs to read the number of stars

No textual summary of contents

Individual Product — Overview

US Investments Home / Mutual Funds / AB Core Opportunities Fund

AB Core Opportunities Fund

Daily NAV	Daily Change	YTD Return	Overall Morningstar Rating™
\$19.62	\$-0.01 (-0.05%)	12.76% ↑	★★★

Reads: 3

Would be nice to say 3 stars

Individual Product — Peer Comparison

Peer Comparison

Morningstar Ratings as of 05/31/2019				
Category: Morningstar Large Growth				
	Overall	3YR	5YR	10YR
Rating	★★★	★★	★★★	--
Investments in Category	1229	1229	1097	

Reads: Overall, 3

Would be nice to say 3 stars

No textual summary of contents

INDV PROD OVERALL STRUCTURE

US Investments Home / Mutual Funds / AB Discovery Growth Fund

Inception Date: 10/01/1996

AB Discovery Growth Fund

Advisor (LCHYX)

Search by Fund Name or Ticker

Daily NAV

Daily Change

YTD Return

Overall Morningstar Rating™

\$12.13

\$-0.05 (-0.41%)

29.18%

★★★★

As of 07/02/2019

Overview

Pricing & Performance

Fees & Expenses

Yields & Distributions

Holdings & Characteristics

Literature

Objective

Long-term growth of capital.

Fund Overview

Primary Investments

+ Seeks unexpected long-term growth potential from small- and mid-cap stocks

+ Greater opportunity for fundamental stock selection, since smaller stocks are followed by fewer industry analysts

+ Led by a team with extensive experience managing US equity portfolios

+ Small- and mid-cap stocks

+ US equities, but may invest in non-US equities

+ Normally holds 60 to 120 stocks

Quick Links

Fact Sheet-Advisor

PDF

Summary Prospectus

PDF

Commentary

PDF

Management Team

Bruce K. Aronow, CFA >

Chief Investment Officer—Small and SMID Cap Growth Equities


Samantha S. Lau, CFA >

Co-Chief Investment Officer—Small and SMID Cap Growth Equities

Wen-Tse Tseng >

Portfolio Manager/Analyst—Small and SMID Cap Growth Equities

Related Insights



Small Wonders: Capturing the Potential of US SMID-Cap Stocks

Key Facts

CUSIP

018636407

Assets \$MM (as of 05/31/2019)

2505.30

Inception Date

10/01/1996

Morningstar Category

Morningstar Mid-Cap Growth

Lipper Classification


Lipper Mid-Cap Growth Funds

Benchmark(s)

Russell 2500 Growth Index

Russell Midcap Growth Index

From Beta to Alpha: Why It Will Pay to Be the Last Active Investor Standing



Content is read in horizontal sections



INDV PROD OVERVIEW

US Investments Home / Mutual Funds / AB Core Opportunities Fund

AB Core Opportunities Fund

Inception Date: 03/31/2010

Advisor (ADGYX) ▼

Search by Fund Name or Ticker 🔍



Daily NAV	Daily Change	YTD Return	Overall Morningstar Rating™	
\$19.62	\$-0.01 (-0.05%)	12.76% ↑	★★★	

As of 06/14/2019

Reads \$ separately from amounts

Doesn't read arrow

Reads 3

Nice to read 3 stars

Skips tooltip

Doesn't read as a collapsed tab (though it does work)

(See separate search page)

Both icons just read "Link"



INDV PROD JUMP TABS

AB Core Opportunities Fund

(Inception date 12/22/1999)

B (ADGBX)

▼

Search by Fund Name or Ticker

Q

Overview

Pricing & Performance

Fees & Expenses

Yields & Distributions

Holdings & Characteristics

Literature

Pricing & Performance

The performance shown represents past performance and does not guarantee future results. Current performance may be lower or higher than the performance information shown. The investment return and principal value of an investment in the Portfolio will fluctuate, so that shares, when redeemed, may be worth more or less than their original cost. Performance assumes reinvestment of distributions and does not account for taxes.

Investors should consider the investment objectives, risks, charges and expenses of the Fund/Portfolio carefully before investing. For copies of our prospectus or summary prospectus, which contain this and other information, visit our Literature Center or contact your AB representative. Please read the prospectus and/or summary prospectus carefully before investing.

The net asset value (NAV) price is the value of one share of the Portfolio as of the date listed. The NAV does not take into account any initial sales charges that may apply when shares are purchased or redemption charges when shares are sold; if these sales charges were reflected, the Portfolio's quoted performance would be lower. The NAV change is the change in value of one share of the Portfolio from the prior day's value.

When a user selects a tab, the text does scroll to the correct anchor
But when entering the content, the reader starts at Overview regardless of which tab is active

User has to find the header in the rotor to move directly into correct content

PRODUCT LITERATURE

AB Core Opportunities Fund (Inception date 31/03/2010)

Overview

Pricing & Performance

Fees & Expenses

Literature

Product

<input type="checkbox"/> Fact Sheet - Advisor	PDF
<input type="checkbox"/> Team Update	PDF

× list 2 items

Reads correctly

<input type="checkbox"/> Fact Sheet - Advisor	PDF
<input type="checkbox"/> Team Update	PDF



× link, Fact Sheet - Advisor 1 of 2



<input type="checkbox"/> Fact Sheet - Advisor	PDF
<input type="checkbox"/> Team Update	PDF

× link, PDF

Reader skips checkbox. No way to select multiples

Reader reads label and icon separately as links—but both do the same thing

<input type="checkbox"/> Statement of Policies and Procedures for Proxy Voting	
<input type="checkbox"/> Understanding Sales Charges & Expenses	

<input type="checkbox"/> YRDI: Interactive Data	
× link, Link	

User doesn't know what is going to happen here

Reader will add “link” at the beginning of a link by default

Our label should say something like “Go to new page”




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ACCORDIONS

Showing : 15 Results

US Equities: Core		^
AB Core Opportunities Fund	Doesn't say it's a collapsed panel	^

Product		Regulatory
<input type="checkbox"/> Fact Sheet	Class: A 	<input type="checkbox"/> Summary Prospectus
<input type="checkbox"/> Team Update	Doesn't say it's a collapsed button	<input type="checkbox"/> Prospectus
Doesn't see checkbox so can't use the pop up collection feature		<input type="checkbox"/> Annual Shareholder Report
		Just says Link, PDF—not what the PDF is

SOME SIDE-BY-SIDE CHARTS CHARTS

Risk Measurements as of 05/31/2019

XLS

	3YR		5YR	
	AB Concentrated Growth Fund	S&P 500 Index	AB Concentrated Growth Fund	S&P 500 Index
Alpha	4.20%	--	2.08%	--
Beta	1.01	1.0	1.02	1.0
Up Capture (%)	114.65	100.0	110.29	100.0
Down Capture (%)	88.29	100.0	97.97	100.0
Standard Deviation	12.35%	11.53%	12.66%	11.62%
Information Ratio	1.12	--	0.52	--
Tracking Error	4.21%	--	4.47%	--
R-Squared	88.42%	--	87.58%	--
Sharpe Ratio	1.22	--	0.88	--

Reads as one row with
a blank cell in the
middle: A&B
Concentrated Growth
Fund, S&P 500 Index,
blank, A&B
Concentrated Growth
Fund, S&P 500

Some side-by-side charts read as one wide chart—making the IA hard to understand

- Includes Risk Measurement, Total Returns

The XLS file is easily readable however

No textual summary of contents

ANNUAL PERFORMANCE GRAPH

Annual Performance Without Sales Charges



Year End Date	Performance	S&P 500 Index Performance
12/31/2011	5.29	2.11
12/31/2012	16.05	16.00
12/31/2013	33.62	32.39
12/31/2014	12.87	13.69
12/31/2015	5.66	1.38
12/31/2016	8.22	11.96
12/31/2017	22.88	21.83
12/31/2018	-2.62	-4.38

Reads fine as XLS

Slide action isn't accessible, but it's also not important information so that's OK. (It's just redrawing the same information at different scales)

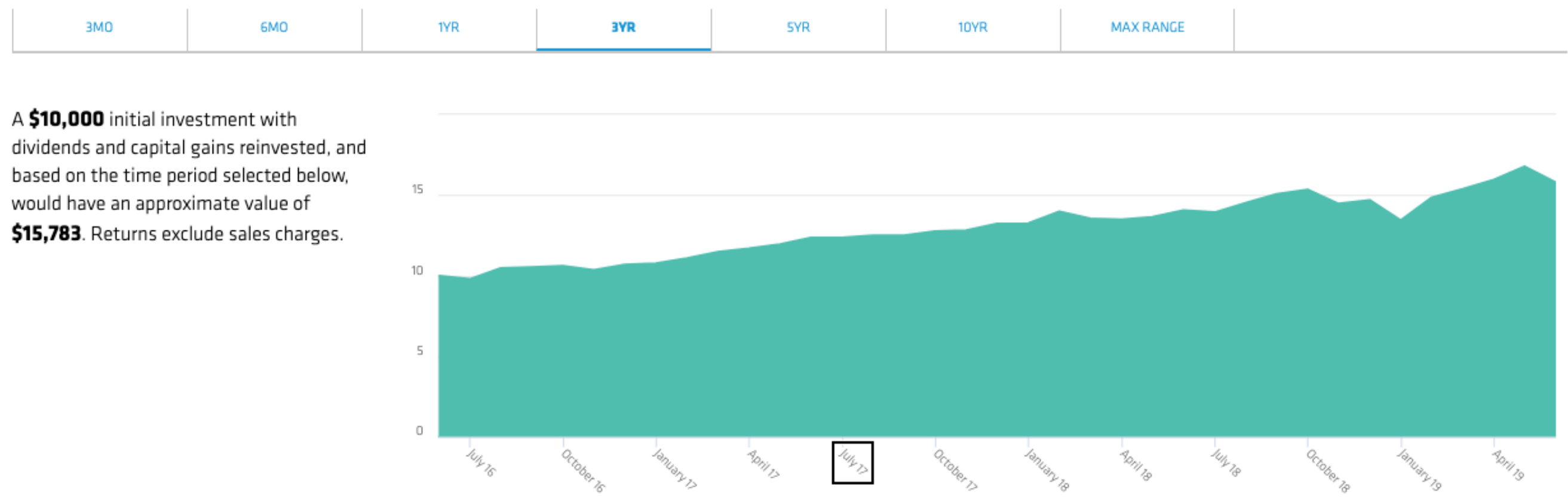
This information is accessible but not understandable due to how it's read

No textual summary of contents

HYPOTHETICAL GROWTH CHART

Reads only part of the data and is incomprehensible

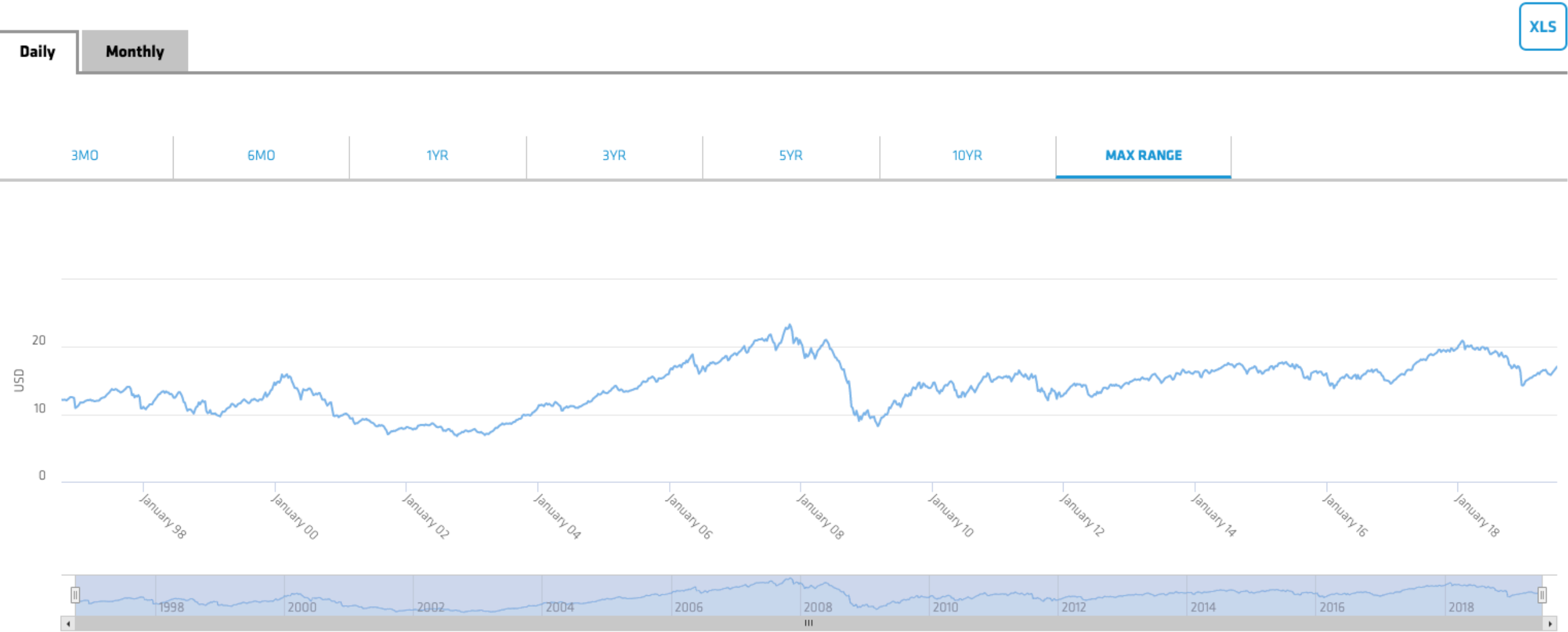
No textual summary of contents



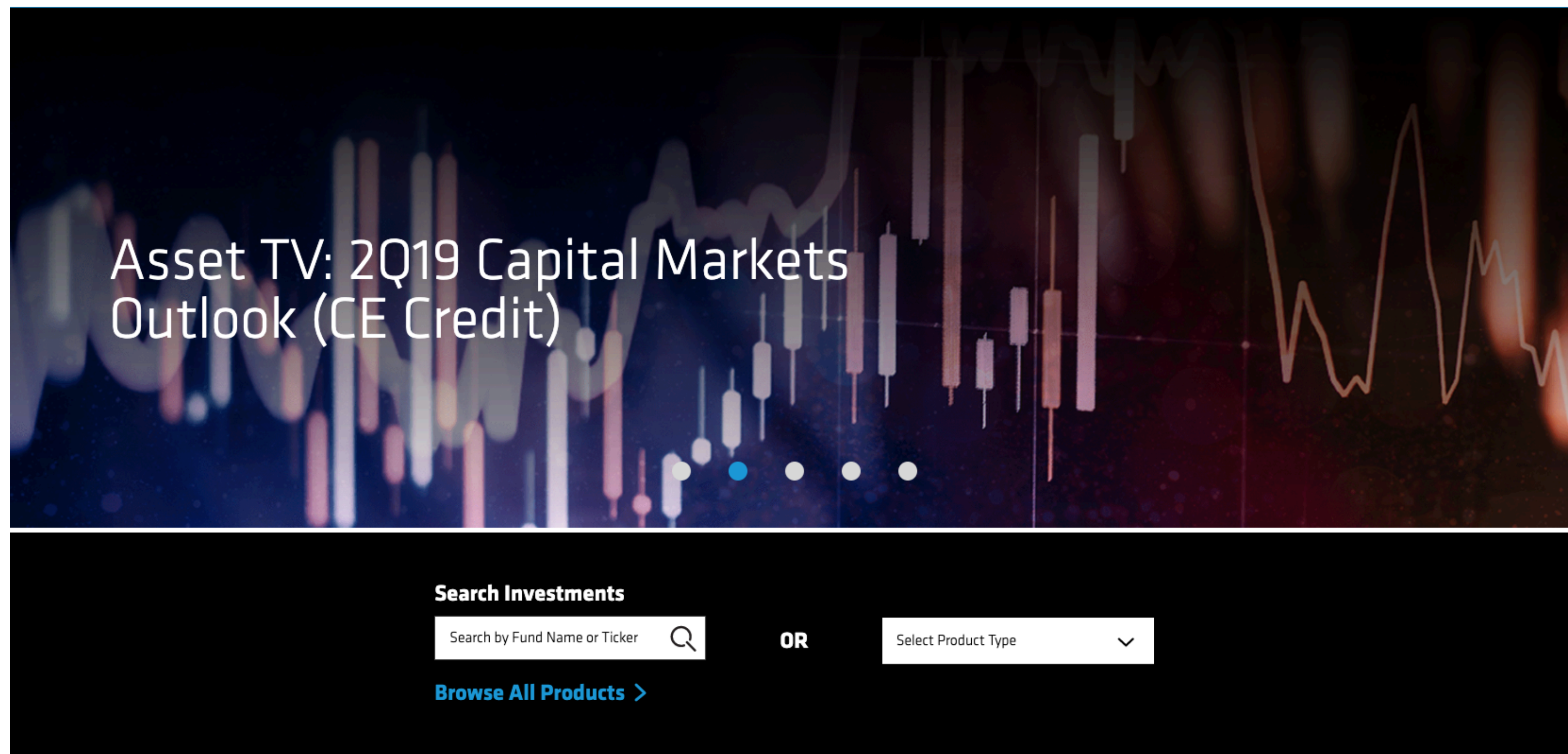
NAV HISTORY CHART

Reads only part of the data and is incomprehensible
No textual summary of contents

NAV History as of 07/02/2019



US RETAIL LANDING — CAROUSEL & SEARCH



When the user tabs into Select, it reads as navigation with no mention of collapsed content

CAROUSEL

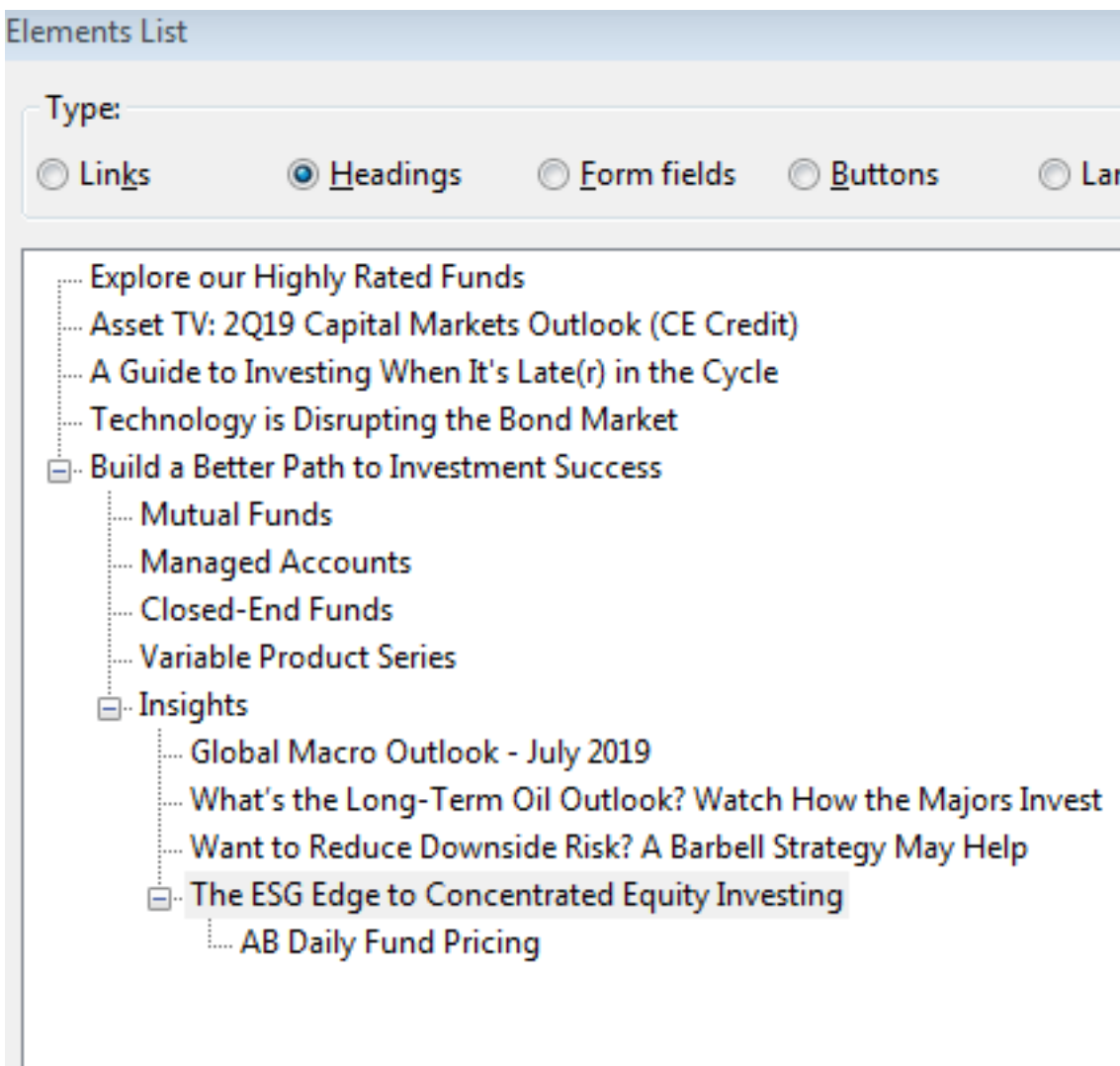
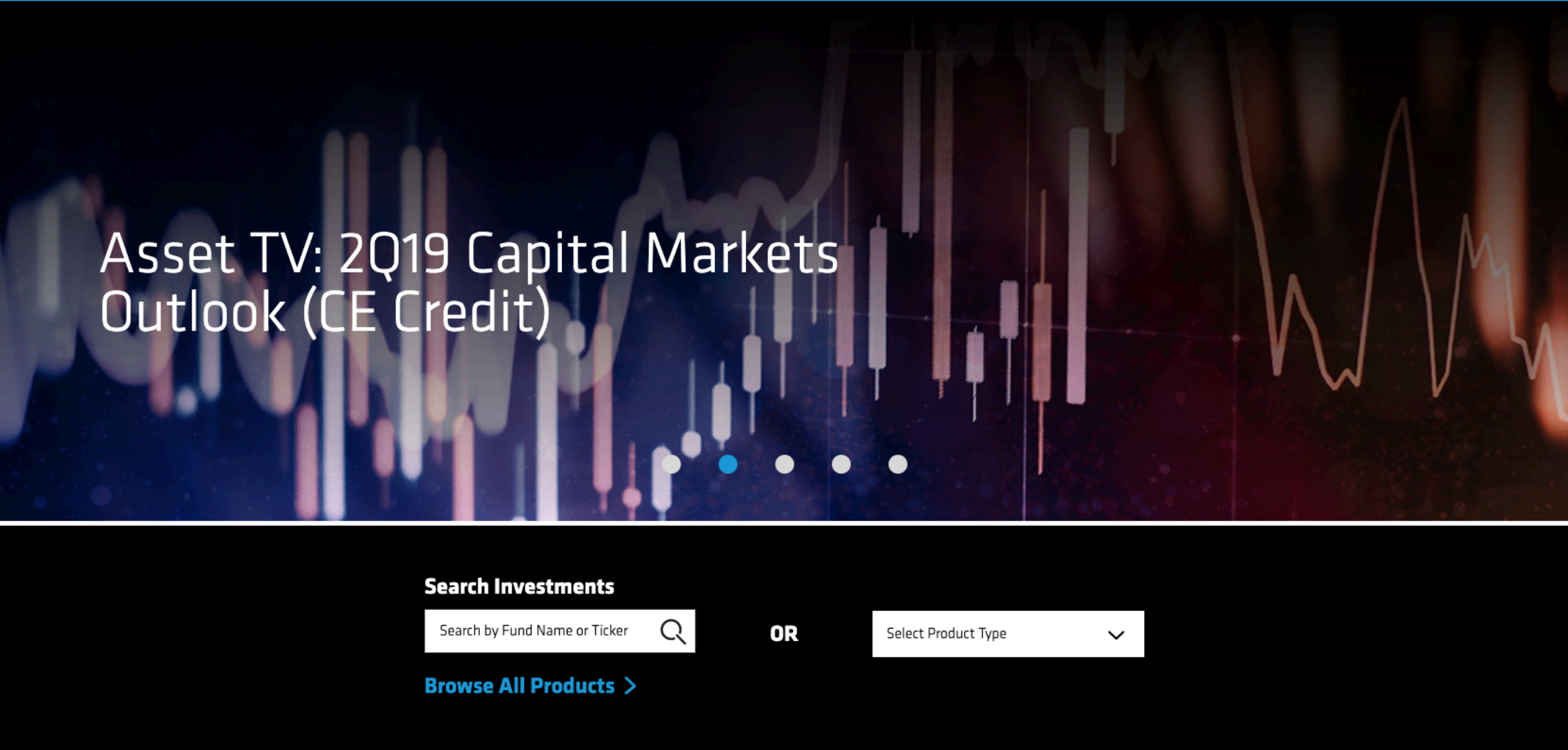
Currently implementation confusing on a screen reader:

- Each carousel item is a separate heading—no indication that they are in a carousel
- The carousel buttons are also read separately as 1, 2 etc
- Once in the carousel, it reads correctly that this is a list with 5 links



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US RETAIL LANDING — STRUCTURE



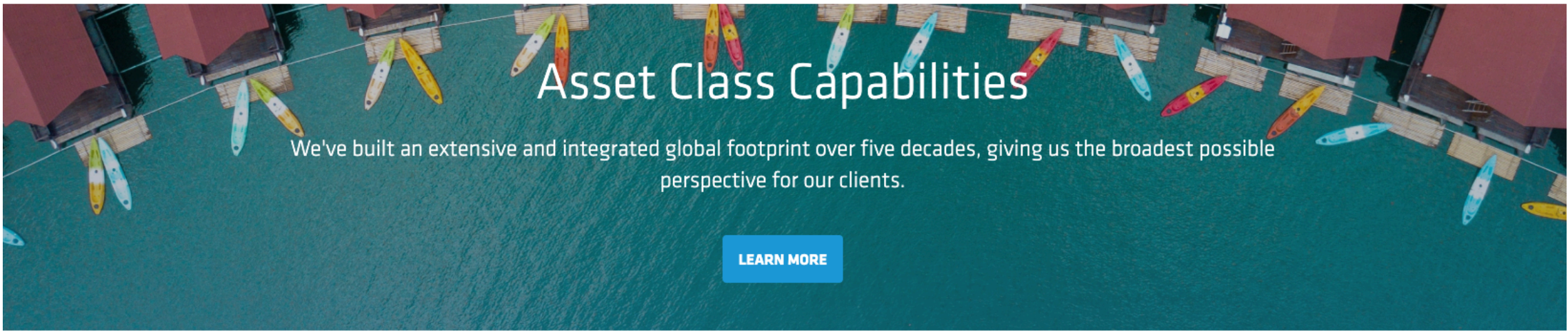
Investments

All Markets, All Assets
Mutual Funds >

High Net Worth Solutions
Managed Accounts >

Income Producing
Closed-End Funds >

Retirement Focused
Variable Product Series >



Insights



IA is confusing in a screen reader:

- **Difficult to scan overall page architecture**
- **Interstitial content very difficult to find**