CT Products user manual

How to set up, run and understand your automated trading platform.

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Contents

1. Getting started
2. Dashboard
3. The AI agent page
4. Brokers (Connect Trader)
5. AI (Connect LLM) and its cost
6. Pairs: what to trade
7. Strategies
8. Reference pairs
9. The rule language
10. Backtest
11. Risk limits
12. Trades: stops, targets and closing
13. Penny stocks
14. Market watch
15. Reports
16. Email notifications and My account
17. Users, roles and data
18. Chat and support
19. Subscription and support
20. When something is wrong
21. Glossary

1. Getting started

CT Products is an automated trading platform. You describe a strategy in plain words (or pick a ready-made one), choose what to trade, set your risk limits, and the AI trading agent watches the market, opens trades when your rules are met, protects every trade with a stop-loss held at your broker, and closes it at the target, at the stop, or when your exit rules say so.

Signing in

Open your app's address in a browser and sign in with your username and password. Change the first password straight away: menu under your name, **Change password** (at least 10 characters).

After signing in you see your **Welcome** page: today's result, open trades, active strategies, issues with a ready fix, improvements waiting for you, a short video tour and shortcuts. Click **Go to the dashboard** to continue, or switch the page off with **Don't show this after sign-in** (Help opens it again).

The screen

- The menu on the left groups the pages: Overview (results), Trading (pairs, strategies, penny stocks), Connections (brokers, AI, email) and Administration.
- The bar at the top shows whether you trade with practice money (**Paper trading**) or real money (**Live trading**), and whether the agent is on.
- Trade alarm: click the bell (Alarm off/on) at the top. While it is on, every page you have open plays a sound and shows the new trade (REAL MONEY or paper) as soon as the agent opens one, for up to 2 minutes or until you press Stop alarm. Your browser may ask to allow notifications: allow them to be told even when the tab is in the background (background tabs check about once a minute).
- Choose the language (English, Arabic, German, Persian, Portuguese, Chinese) and the colour theme at the top. Every page has a **Help** button for that page.

Your first hour, step by step

1. Connect a broker on paper: Connections > Connect Trader (see Brokers).
2. Connect an AI: Connections > Connect LLM (see AI).
3. Add one or two pairs to trade: Trading > Pairs.
4. Create a strategy from the library: Trading > Strategies > New strategy > Use this.
5. Check your risk limits for each broker (Trading > Risk limits) or use the recommended ones, then save.
6. Switch the agent on: Overview > AI agent > Turn on.
7. Watch the AI agent page: **Why no trades?** explains anything that is still missing.

Tip: Trade on paper for a few weeks before using real money. Results on paper show whether a strategy suits a market; no strategy can promise profit.

2. Dashboard

The dashboard shows your results for the period you choose (7 days to all time) and refreshes itself.

- **Account value**: the value of your broker accounts (only for users who may see all data).
- **Today** and **This month**: profit or loss of closed trades, in US dollars (Binance amounts are in USDT, worth one dollar).

- **Win rate**, **Open trades** and **AI checks today** with their cost.
- **Closest to a trade** (right under the numbers): only the pairs where a strategy has 90% or more of its rules met, so a trade may open soon. When none is that close it names the closest pair; **All opportunities** opens the full list on the AI agent page.
- Charts: account value over time, wins and losses, daily results, results per strategy and per pair.

Tip: A deposit or a demo top-up raises the account value too; judge trading by the profit figures, not by the account value change.

3. The AI agent page

This is the control room of the trading agent. From top to bottom:

- **Turn on / Turn off**: the agent opens new trades only while it is on. Open trades keep their stop-loss at the broker either way.
- **Close all and stop**: closes every open trade at market and turns the agent off (asks first).
- **Markets now**: whether US stocks, forex and gold, and crypto are open, with opening times in your time.
- **Why no trades?**: a checklist of everything a trade needs (agent on, broker ready, AI available, strategies with pairs, limits). Anything red or amber says what to do.
- **Open trades**: entry, stop, target, current profit, and a **Close** button per trade.
- **Issues**: problems the agent ran into, each shown once with how often it happened.
- **Upcoming opportunities**: pairs where a setup is forming, and **Decisions**: every buy, sell, skip and stop move with the reason.
- **Filters**: choose a strategy (the buttons at the top) and/or a **Pair** (the drop-down) to see only its numbers, opportunities, trades, issues and decisions; Show everything clears them.

4. Brokers (Connect Trader)

Connections > Connect Trader lists your brokers. For each: save its keys, **Test connection**, then **Run** so the agent uses it. **Paper** trades with practice money; switching to **Live** needs a successful test of the live keys and typing LIVE to confirm.

Binance (crypto)

- Create API keys in Binance with **spot trading** allowed and **withdrawals switched off**; restrict them to the server's IP address.
- Testnet keys (testnet.binance.vision) for paper, normal keys for live.
- Binance spot can only sell coins you own, so Binance pairs take the buy side only.

Interactive Brokers (US stocks)

- Runs through the IB Gateway on the server; paper and live accounts are separate logins.
- US stocks need IBKR's market data subscription (about 10-15 USD a month on the live account; the paper account shares it). Without it IBKR refuses prices and orders.
- Short selling needs a margin account and shares IBKR can lend.

Exness (forex, gold, indices, crypto CFDs)

- Runs through MetaTrader 5 on the server. Enter the account number, the **trading** password and the exact server name (for example Exness-MT5Trial15).
- Standard account symbols end in m (XAUUSDm = gold). Only instruments priced in your account currency can be traded.
- Exness trades open with the lot size set on Connect Trader > Exness.
- Find the account number and server at my.exness.com: My accounts > the MT5 account > ... > Account information. The trading password is set when the account is created (... > Change trading password).

Trades of a fixed length, and take profit in money

On the strategy page: **Close Each Trade After** closes every trade when it has been open that long (for example 10 minutes = one 10-minute candle), win or lose. **Take Profit At (money)** closes it as soon as it has made that much (for example 5 USD), whatever the lot size. The stop-loss stays at the broker the whole time. Backtests follow both settings.

Pepperstone MT4 not connected?

System > MetaTrader > MetaTrader 4: save the Pepperstone login, password and server once (**Change the account details**), then press **Log in MT4 again**. MT4 restarts, signs in, turns AutoTrading on and attaches the CTBridge robot by itself, in 1 to 2 minutes. No PuTTY or web view is needed. The agent also does this on its own when MT4 stays disconnected for 5 minutes. Open trades keep their stop-losses at Pepperstone while MT4 restarts.

Going live with Exness (real money): checklist

1. Open a real MT5 account at Exness (Standard), deposit, and consider a moderate leverage (1:100 to 1:200).
2. Connect Trader > Exness > Real account: account number, server, trading password; **Save**, then **Test connection** must show Connected with your real balance.
3. System > MetaTrader: **Test connection** must show the real account and **Algo Trading: On**. If it is off, press **Turn on** next to Algo Trading on that page (or, in the MT5 web view, the Algo Trading button so it turns green).
4. Risk limits > Exness: set Risk per trade so the smallest lot fits (with a small account, 0.01 lot of gold can lose 3 USD or more at the stop); daily loss limit and open trades.
5. Open each strategy and read **Will it trade?**: no red lines.
6. Connect Trader: **Switch to Live trade** for Exness and type LIVE. Open demo trades are left on the demo account. Start with the smallest lot and watch the first trades.
7. Switch on the trade alarm (bell at the top) to hear every new trade.

Careful: One MetaTrader terminal holds one account at a time: while real-money trades are open, the demo account can't be tested (the app refuses, so MT5 is never pulled away from the live account).

Tip: Pepperstone can be connected and tested; live trading through it stays locked.

5. AI (Connect LLM) and its cost

The AI turns your strategy text into rules when you save a strategy, double-checks entries when a strategy asks for it, and writes summaries. Rules themselves are checked in plain code at every candle, so trading does not wait for the AI.

Which AI does what (Connect LLM): the main AI does everything except reading chart images and PDFs, which you can give to Claude or ChatGPT (Automatic picks one that has a key saved, even if it's stopped for everything else). Example: DeepSeek as the main AI, Claude only for strategy charts.

- Connections > Connect LLM: save a key for Claude (Anthropic), ChatGPT (OpenAI) or DeepSeek, **Test**, and choose which one is in use.
- Connections > AI usage and cost: calls and cost per day, and a daily limit.

6. Pairs: what to trade

- **Binance**: USDT pairs such as BTCUSDT, ETHUSDT, XRPUSDT.
- **Interactive Brokers**: US stocks by category or by searching a name.
- **Exness**: search by name or category; tick the instruments marked Can be traded; the box in the table header selects all that can be traded in the search.

After adding pairs, tick them in the strategies that should trade them. Keep the list focused: every pair is checked against every strategy each minute.

7. Strategies

Trading > **Strategies** opens two pages: **Basic Strategies** (you describe the strategy in words, or start from a ready-made one) and **Professional Strategies** (you build it on a live chart with your own indicators). Both use the same form, the same AI agent and the same automatic care; a Professional strategy adds the chart and its indicators before the story board. Up to 50 strategies can be switched on at once (basic, professional and penny together); switched-off ones don't count, and up to 150 can be kept.

Basic Strategies > New strategy opens the strategy form. Fill it in from top to bottom:

1. **Strategy Title**: a name (text and numbers).
2. **Strategy For Capital**: the budget for this strategy. Trades are sized on it and its open trades never use more than this amount (empty = the whole account).
3. **Broker Name**: one or more brokers.
4. **Applicable for Pair**: type a ticker or name; the list shows the pairs of the chosen brokers (from your Pairs lists). Choose as many as you like.
5. **Trade Direction**: Buy, Short or Both.
6. **Profit Trail**: Yes - the agent trails the trade itself (stop to break-even at 1R, then one risk-unit behind the price) or as your story says; No - no trailing, the trade closes at its target, stop or exit rules.
7. **Entry Timing**: Inside the candle - the rules are checked every 15 seconds on the candle that is still forming and the trade is taken the moment they are all met (at most one entry per candle), so on 2m or 5m candles the chance isn't missed; At the candle close - the trade waits for the candle to close (fewer false signals). Every strategy uses Inside the candle unless you choose otherwise. Exit rules are checked at each candle close; the stop-loss and take-profit are at the broker all the time.

8 **User Strategy Story Board**: in your own words, how you take the trade, the time interval (for example the 5-minute chart), all rules and parameters, and how to exit.

Charts and documents: under the story board you can add up to 6 files: chart screenshots (PNG, JPEG or WebP, up to 5 MB) or PDF files (up to 9 MB and 20 pages; one save carries up to 9 MB). The AI agent reads them together with your story when it converts the strategy. Claude and ChatGPT read images and PDFs (text and charts); with DeepSeek only the text of PDFs is used. Password-protected PDFs can't be used. Your files are private to you.

Save strategy: the **AI Agent Convert** section then shows the refined strategy and the exact rules the agent checks, with the timeframe taken from your story. Rule lines you write in the story are used as written. Library strategies (the optional list at the top) and copies keep their tested rules.

Professional strategies: build on a chart

Trading > Strategies > **Professional Strategies** > **New professional strategy**. The form is the same as for a basic strategy, with **Chart and indicators** before the story board:

1 **Pair**: choose any pair from your Pairs lists; the chart shows its current prices, and the pair is ticked as one of the strategy's pairs. The candle size you pick (1m, 2m, 5m, 15m, 30m, 1h or 4h) is the strategy's timeframe: the agent trades those candles (shown as Strategy timeframe under the buttons).

2 **Indicators**: add as many as you need. On the price: moving averages (SMA, EMA, WMA), Bollinger Bands, VWAP with bands, Liquidity Swings, trading sessions, Standard Deviation levels and Volume. In their own pane under the price: RSI, MACD, Stochastic, ATR, CCI and ADX.

3 Click an indicator's gear button to set it up: length, source, levels and colours (Inputs, Style and Visibility tabs). The eye hides it, the bin removes it.

4 **Indicators of this strategy** under the chart lists every indicator with the exact names the AI agent uses for it in the rules, with your settings, for example ema(close, 50) or rsi(close, 7).

5 **User Strategy Story Board**: write when to buy and when to sell with these indicators and how they behave, for example: buy when EMA 50 crosses above EMA 200 and RSI 14 is between 50 and 70; stop-loss 2 x ATR 14; target 1:2.

6 **Save strategy**: the AI agent converts the story into its own rule language with exactly your indicator settings and saves it. The table then shows which indicators the rules use. When you change an indicator's settings and save, the story is converted again with the new settings.

After saving, the chart shows where the strategy's rules would have bought (green triangle) and sold (red triangle) on the chart's candles, where each trade closed and its result, with a summary under the chart. This quick test leaves out fees and only covers the candles on the chart: use **Backtest** for the full test.

Self-healing and self-training: a Professional strategy has its own two switches. Self-healing: after a losing run (as set on Trading > Self-healing) the AI agent pauses it, retrains and tests it, and applies a better version. Self-training: once a day the AI agent trains it on past prices, tests every version on a period it never saw (self-testing), applies a better version by itself only while it trades on paper, and reports daily. Both keep your indicators and settings and never change your risk limits.

Improving a strategy with the AI agent

- AI Agent Findings: during self-training the AI reads the strategy's closed trades, above all the stop-loss hits, and explains in three steps: Findings, Modification, Logic.
- **Trader Input**: ask a question or disagree; the AI answers with new findings, modification and logic. The whole conversation is kept.

- **Approve modification**: the strategy is updated and the old one is kept as history; **Roll back** restores the previous strategy.

Improving a strategy with backtests

- **Self-training** switches (Trading > Self-training, one per strategy): once a day, for every active strategy whose switch is on, the AI agent backtests the current rules on the last 90 days, proposes up to 3 improvements and backtests each one. The period is split: the first 70% to learn from and the last 30% as an unseen check. An idea is proposed only if it clearly beats the current rules on the learning part and is not worse on the unseen part. Step 4 of the slider, Backtest check, shows before and after.
- A change is applied automatically only while the strategy trades on paper (with real money it waits for your Approve). Only the rules change, never the risk limits. A daily report lists what improved, and Roll back restores the previous rules.

Self-training towards a profit goal

- Trading > **Self-training**: pick a strategy, then choose one pair, the capital, the profit goal and the days. The AI agent designs and refines the strategy itself (rules and timeframe), backtesting every version on past prices and on an unseen period, until a version reaches the goal pace or the AI budget runs out.
- A version that reaches the goal pace paper trades that pair until it earns the goal; then the strategy stops by itself (open trades closed). It also stops when the days are over. You get a progress email every day. Only brokers on paper trading can be used; your risk limits never change.
- **Self-healing**: after a number of losses in a row, or a drawdown over your limit, new trades pause and the agent retrains the strategy, then trading continues.
- Big goals in a short time (for example +20% in a month) are very demanding: the agent tells you honestly when no version reaches that pace.

Risk limits

Every strategy follows Trading > Risk limits, set per broker. The strategy's capital limits how much of the balance its trades can use.

Community strategies and ratings

Trading > **Ratings** lists every strategy with its stars and latest feedback; open one to rate it (1 to 5 stars) and comment. Community strategies keeps every strategy as history to copy with Use this. Trades and balances stay private.

Saving

Save strategy is at the bottom of the strategy page and saves everything on the form. On 1 to 5 minute candles you see a yellow note: fees take a large share of each trade there, so backtest first.

8. Reference pairs

Trading > Pairs > **Reference pairs** lists pairs that are not traded but whose moves decide trades on another pair, for example: when THB/VND has moved 50 pips up since today's open, buy gold. Prices come from TradingView and are read two ways: the pair itself and the pair worked out from its two US-dollar rates (THB/VND = USD/VND / USD/THB). A price is used only while it is at most 15 minutes old and both ways agree within 0.3%; otherwise no trade is taken and the page says why.

- **Live prices**: the price, the two-way check, today's open, the move today in pips and what 1 pip is in %. Compare with TradingView and change the pip size if your pips differ.

- **Add or change a reference pair**: 6 letters (base then quote, like BRLGBP), the pip size (0.0001 for most pairs, 0.01 for pairs priced in the hundreds like THB/VND) and today's open: TradingView's daily candle (as on your TradingView chart) or an hour (UTC). The app records every price it reads on your server; moves over time and the chart's quick test use these recordings.
- **Make a strategy from a reference pair**: choose the pair, the pips, what to do when it moves up (Buy, and Sell when it moves down - or the opposite), the pair to trade (for example XAUUSD at Pepperstone), the candle size, the stop-loss in ATR and the reward-to-risk. It creates a Professional strategy with exact rules, switched off: check it, then switch it on with its Active switch.
- In your own rules: pips(THBVND, day) since today's open, pips(THBVND, 60) over the last 60 minutes, refprice(THBVND) its price. ENTRY: pips(THBVND, day) crosses_above 50 takes one trade each time the move crosses +50 pips.

Will it trade? (risk check)

When you click **Save strategy**, the app first checks your settings the way the agent checks a trade, without ordering anything: the broker is started, short selling is possible, the risk limits allow a trade (open trades, trades per day, daily loss, position size, the broker's smallest trade, the MetaTrader lot against Risk per trade), and the stop-loss rule gives a valid level at today's prices. If something would stop or limit trades, a pop-up lists it with the fix: **Go back and fix** or **Save anyway**. The same check is shown on the strategy page with **Check again**.

- Every line names its broker, for example "XAUUSDm (Exness) buy ..." or "XAUUSD (Pepperstone) buy ...".
- A broker that is stopped on Connect Trader doesn't block a strategy that also trades at a running broker: its pairs are skipped with one note (the agent doesn't trade them either).
- MetaTrader problems found by the agent's own check every 2 minutes are red lines here: MT5 not answering, not connected to Exness, Algo Trading off, or trading not allowed for the account.
- A MetaTrader (fixed-lot) trade whose loss at the stop-loss is more than 1.5 times your Risk per trade (5% of the account when Risk per trade is off) is a red line: the agent skips it. Risk per trade is your choice, from 0.1% to 100% (Risk limits); above 5% saving asks you to confirm.

Upcoming opportunities

Every strategy page shows **Upcoming opportunities**: for each of its pairs, how many entry rules are met, what it still waits for and whether it is in a trade, and for reference pairs how far the move has come (for example +44.7 of +50 pips). It updates every 15 seconds.

9. The rule language

One rule per line. All ENTRY lines must be true to buy; STOP is required.

```
ENTRY: <condition>     all must be true to buy
STOP: <expression>     where the stop-loss goes
TARGET: <expression>   profit target (optional)
EXIT: <condition>      any true closes the trade
TRAIL: <expression>    raises the stop when higher
SHORT_ENTRY / SHORT_STOP / SHORT_TARGET / SHORT_EXIT / SHORT_TRAIL for sell (short) trades
```

- Conditions compare two expressions with >, <, >=, <=, == (equal), != (not equal), crosses_above or crosses_below.

- Trading sessions: LONDON == 1 (inside London), ASIA == 0 (outside Asia), max(LONDON, NEWYORK) == 1 (inside either). Written as LONDON, not ASIA or LONDON or NEWYORK, they are understood the same way.
- Values: open, high, low, close, volume; SMA20, SMA50, SMA200, EMA9, EMA21, RSI14, VOL20, ATR14, VWAP, BBU20, BBL20; SWINGH, SWINGL (Liquidity Swings levels); ASIA, LONDON, NEWYORK (1 inside the session) and ASIAH, ASIAL (the latest Asia session's high and low); name[n] means n candles ago.
- Functions: highest(x, n), lowest(x, n), avg(x, n), change(x, n), min(a, b), max(a, b), abs(a).
- Indicators with any settings (lengths 1 to 200): sma(x, n), ema(x, n), wma(x, n), rsi(x, n), stdev(x, n), bbu(x, n, k), bbm(x, n), bbl(x, n, k) (Bollinger Bands), macd(x, fast, slow), macdsignal(x, fast, slow, signal), macdhist(x, fast, slow, signal), atr(n), stochk(n, smooth), stochd(n, smooth, d), cci(n), adx(n), swinghigh(n), swinglow(n), vwap(a), vwapu(k, a), vwapl(k, a) (a = 1 day, 7 week, 30 month). x is usually close. Add [n] for n candles ago, for example rsi(close, 14)[1].
- In STOP, TARGET and TRAIL: entry, stop and price.
- Daily levels: DOPEN, DPREV, DHIGH, DLOW and DSD (daily standard deviation).

```
ENTRY: EMA21 > SMA50
ENTRY: close crosses_above EMA21
ENTRY: RSI14 < 70
STOP: lowest(low, 5) - avg(high - low, 14) * 0.3
TARGET: entry + 2 * (entry - stop)
EXIT: close < SMA50
```

```
ENTRY: ema(close, 50) crosses_above ema(close, 200)
ENTRY: rsi(close, 14) > 50
ENTRY: macdhist(close, 12, 26, 9) > 0
STOP: price - 2 * atr(14)
TARGET: entry + 2 * (entry - stop)
```

Tip: In a prompt, don't start plain sentences with Entry: or Stop: ; write 'Buy when...' instead, or put real rule lines in the rules box.

10. Backtest

Trading > **Backtest** replays a strategy on past prices, on a simulated account: no orders are sent. It uses the same rules, trailing and risk sizing (the strategy's capital and the account risk limits) as live trading.

1. Choose the strategy (only strategies with complete rules can be tested).
2. Choose the pairs (up to 10; the strategy's own pairs are ticked) and the period (From and To, or 1 month to 1 year). Each timeframe has a longest period, for example 30 days of 1-minute candles or 3 years of 1-hour candles.
3. Check the starting capital, the fee and the slippage, and click **Run backtest**. The page shows the progress and the result: net result, win rate, profit factor, largest drawdown, the account value over time, results per pair and every trade.

- Binance history comes from its public market data. IBKR history needs the IB Gateway running and logged in (with market data); Exness history needs MetaTrader 5 on the server logged in.
- New trades fill at the next candle's open; if one candle touches both the stop and the target, the stop counts. AI confirmation isn't asked in a backtest.

- No trades, or fewer than expected? The section **Why these trades** on the result shows how often each entry rule was true, the closest the rules came, and signals refused by your risk limits (for example a stop closer than your minimum, common on 1-minute candles).
- A good backtest is not a promise: test on paper next, then with small amounts.

11. Risk limits

Trading > **Risk limits** has a tab for each broker (Binance, Interactive Brokers, Exness). Each tab shows that broker's balance and what is used now (open trades, money at risk at the stop-losses, today's result, new trades today), and its own limits, counted on that broker's trades only. Tick **Apply** for each limit you want and save. Every trade always gets a stop-loss.

- **Risk per trade**: sizes each trade so that hitting the stop loses this share of the balance (1% is common).
- **Largest position**: the most one trade may be worth, as a share of the balance.
- **Open trades at the same time** (all strategies together at that broker), **New trades per day**.
- **Open trades on the same pair**: counted for each strategy at that broker. 1 means one strategy never has two trades on one pair at once, while another strategy can open its own trade on that pair.
- **Daily loss limit**: no new trades for the rest of the day once reached.
- **Reward-to-risk ratio (1:R)**: 1:1 to 1:5. The take-profit is placed exactly R times the stop-loss distance from the entry price (1:2: risk 1 to make 2). Off = each strategy's own target is used.

The live guide

Next to the limits, the **Live guide** turns them into money as you type: the loss if a stop is hit, the largest trade, an example trade with the stop 1% away, the worst case if every open trade hits its stop, and the daily loss limit. Bars show what is used right now, and warnings appear when a setting is risky.

Recommended limits

Use recommended limits sets a careful starting point for the selected broker in one click: risk 1% per trade, largest position 10%, 3 open trades, 10 new trades a day, daily loss 3%, reward-to-risk 1:2, one open trade per pair for each strategy.

Exness lot size

Set on Connections > Connect Trader > Exness, under **Lot size**: every Exness trade opens with this volume (0.01, 0.1, 1 or your own, up to 100), like a manual trade on the Exness platform. The stop-loss comes from the strategy, the take-profit from the reward-to-risk ratio. A trade that needs more margin than is free is skipped. A trade is also skipped when, at its stop-loss, it would lose more than 1.5 times your Risk per trade (or more than 5% of the account when Risk per trade is off); and when the stop-loss is too close to the price for Exness (spread and minimum stop distance). The stop-loss is sent with the order itself.

Careful: Set a sensible account leverage at Exness too (for example 1:100 or 1:200), not unlimited.

Self-healing

Trading > **Self-healing**: tick **Apply** for each trigger (losing trades in a row, drawdown as a share of the strategy's capital). When one is reached, the strategy's new trades pause, the AI agent studies its losses and backtests better rules. Paper strategies can get them automatically; real-money strategies wait for your Apply. The table shows every strategy's status, with **Resume** and **Heal now**.

Suggested fixes for issues

Each issue on the AI agent page shows a suggested fix: for example a stop-loss based on ATR when the stop was too close, a target from the stop when reward-to-risk was too low, or a moderate raise of a limit. Click **Apply fix** to accept it; the old version is kept so Roll back restores it. For other issues click **Ask the AI for a fix** and review its answer first. The daily loss limit is never raised.

Learn from losses

Trade history > **Learn from losses and optimize**: the AI studies the losing trades of up to 8 strategies (stop-loss hits and the review of each loss) and backtests better rules for each. Only ideas that beat the current rules and are not worse on unseen prices are marked best; **Apply all best ideas** uses them (real-money strategies always wait for you).

12. Trades: stops, targets and closing

- The stop-loss is placed at the broker the moment a trade opens, so it works even if the server is down. If it can't be placed, the trade is closed straight away.
- The target closes the trade when reached; TRAIL rules move the stop only in your favour.
- On Exness the stop-loss goes out with the order itself; MT5 must be signed in to the right account (real for live, demo for paper) or nothing is sent. Every 2 minutes the app compares Exness's positions with its own list and reports any it doesn't follow.
- **Chart** of an open trade: entry, stop-loss and take-profit on the chart, reward : risk, and in money **If take-profit hits** and **If stop-loss hits** (also written on those lines), plus Profit now.
- **Trade alarm**: the bell at the top of every page rings and shows each new trade until **Stop alarm**.
- If the price jumps past the stop, the agent sells at market.
- **Close** on the AI agent page closes one trade within about 15 seconds; **Close all and stop** closes everything and turns the agent off.
- **Deleting**: the bin button deletes one agent decision or one closed trade permanently; **Delete all** (your password needed) deletes every decision, or every closed trade the page shows with its current filters. Open trades can't be deleted. Deleted trades disappear from every report and can't be brought back. Deleting closed trades needs the permission Delete closed trades (Admin has it).

13. Penny stocks

Trading > Penny stocks: your penny strategies (Interactive Brokers, US exchanges). Create several; each name ends with 'Penny Strategy', and each has its own capital, settings, switch, live view and results. Tabs: Overview, Strategies, Live trades, History, Performance (charts) and Reports.

- Filters: price range (for example under 1 USD) and volume at least N times the normal volume. Optional, several at once: recent news or a recent SEC financial report. Stocks that just filed to sell new shares are always skipped.
- Trade: Buy, Short or Both. Default entry: an elephant candle on the 2-minute chart, a big-bodied candle on high volume that closes beyond the last 5 candles; the stop is just beyond the candle.
- Take-profit at the reward-to-risk ratio of the Interactive Brokers risk limits, which are on the same page. Profit trail Yes: at 1R the stop moves to the entry and then follows the price. Everything is closed before the market closes; with the last-hour tick, no new trades after 15:00 New York.

- Self-training (Trading > Self-training) works per penny strategy: once a day the AI tunes its settings from its closed trades (applied on paper, waiting for Apply with real money).
- Pattern Day Trader rule: under 25,000 USD, at most 3 day trades in 5 business days.
- Check a symbol (Live trades tab): type a stock you saw elsewhere, for example on Barchart. The app asks Interactive Brokers and lists why the strategy did or didn't pick it: the exchange (only NASDAQ, NYSE and AMEX are scanned, not over-the-counter stocks), whether IBKR's scan lists had it and whether it fell outside the stocks checked per scan (setting Stocks checked per scan, 10 to 100, default 30; gainers, most traded and losers are taken in turn), and each of the strategy's filters it fails.

Careful: Penny stocks are the riskiest market: halts, gaps and pump-and-dump schemes. Test on paper first.

14. Market watch

Overview > **Market watch** is your own watchlist, separate from the pairs the agent trades. It opens at once with the last prices and then updates every second: crypto tick by tick from Binance, IBKR and Exness from their live feeds.

- **Add symbol**: choose Binance, Interactive Brokers or Exness, search (for example XRP, AAPL, EUR.USD, XAUUSD) and tap +. Each user has their own list.
- Tap a symbol for its page: the price, today's change, a chart (candles, line, area or bars) for 1 day to all time, **Key stats** (volume, day and 52-week range, volatility), performance and **News**.
- On the chart: drag to move through time, pinch or scroll to zoom, drag the price scale to stretch it, double-tap to reset, tap a candle for its open, high, low, close and volume.
- Remove a symbol from the menu on its page.

Tip: Real-time IBKR prices need the IB Gateway and a market data subscription at IBKR; without one, prices are delayed and marked so.

15. Reports

Drill down: click any number or chart on the Dashboard to see the trades behind it (a day's bar, wins or losses, a pair, a strategy, an hour of the day). Trade history then shows **Where the results come from**: results by broker, by strategy and by pair; click a row to see those trades.

Why it lost: when a trade closes at a loss, the AI agent explains why (entry timing, stop placement, trend, volatility or news) and how to manage similar trades. It shows under the trade in Trade history and on the strategy page, and Analyse past trades uses it. Switch it off on Connect LLM; it never uses the last 10 AI checks of the day. AI usage and cost shows the AI cost per day and per trade.

Every report has period buttons (7 days, 30 days, 90 days, 1 year, All time) and **Custom**: choose a From and a To date and click Apply. The chosen period stays when you change other filters. Every table can be sorted by clicking a column header (click again to reverse), and long tables show 10 rows per page with Previous, Next and page numbers.

- **Performance**: results per strategy, pair, broker and exit reason, with charts; filter by period, strategy, broker (and user, for administrators).
- **Trade history**: every closed trade with entry, exit, profit and duration; filters and CSV download.
- **Compare**: two instruments side by side. **Market watch**: live prices for your pairs.

16. Email notifications and My account

- My account (menu under your name): your email address and which emails you want: trade opened, trade closed, stop-loss hit, a daily summary around 22:00, and problems (at most every 30 minutes).
- You only get emails about trades you may see.
- Administrators set up the mail server on Connections > Email and can send a test email.

17. Users, roles and data

Administration > **Sign-in log** lists every sign-in and failed attempt with the IP address, country and city, device, operating system, browser and a device ID. A sign-in from a **New device** or a **New country** is flagged. Websites can't read a device's MAC address, so each browser gets its own device ID.

- Administration > Users: add people, reset passwords, give a role or custom permissions.
- Roles and permissions: each page has view, edit and delete rights. Built-in roles: Super Admin, Admin, Agent, Reporting.
- Every strategy belongs to the user who created it, and so do its trades. Users see only their own strategies, trades and results, without account balances. The permission **All users' data** (Super Admin, Admin) shows everything, with a User filter on reports.
- Audit log: every sign-in and change, with who and when.

18. Chat and support

The chat button in the header opens a chat panel. In your app it reaches the support team; staff with Live chat see their open chats there (unread chats show as a red number).

- Text and emoji: Enter sends, Shift+Enter starts a new line.
- Pictures: the clip attaches a picture or PDF; you can also paste a picture or drop it on the chat.
- Screenshots: the screen button asks which screen or window to capture, then shows it before sending.
- Voice messages: the microphone records (up to 2 minutes); press it again to stop, listen, then Send. The browser asks once for permission to use the microphone.
- Support tickets have the same emoji, screenshot and voice note buttons.

19. Subscription and support

- Your subscription is managed on the billing portal: **My account** shows your plan, app address and renewal; **Manage billing** changes card, plan or cancels.
- Plans set how many brokers run at the same time and whether live trading is allowed. If a payment fails, trading continues for a few days, then no new trades open until it is fixed.
- **Support** (menu under your name): open a ticket with a screenshot and follow the replies.
- **Live chat**: the chat button on the portal; when we're offline, leave a message and we answer by email.

20. When something is wrong

- **No trades**: read Why no trades? on the AI agent page; each red line says what to fix.
- **Position too small**: the balance or limits allow less than the broker's minimum; raise Largest position or risk per trade, top up, or (Exness) choose a smaller lot size.
- **Stop-loss closer than your minimum**: the setup's stop is too tight for your limits; it is a protection, not an error.
- **Reward-to-risk below your minimum**: the target is too close compared with the stop.
- **Broker didn't fill** (IBKR): often a missing market-data subscription or a live session open elsewhere.
- **MT5 isn't answering** (Exness): check that MT5 on the server is logged in to your Exness server and Algo Trading is on.
- **Live trading is locked**: live trading for that broker isn't enabled in this version (IBKR, Pepperstone); use paper.
- **Algo Trading is OFF in MetaTrader 5** (red line on Will it trade?): System > MetaTrader > Algo Trading > **Turn on**. MT4 (Pepperstone) has the same switch for AutoTrading; the first time, CTBridge needs "Allow DLL imports" ticked in MT4 (the app says how).
- **IBKR's prices are about 15 minutes late** (Penny stocks): the account has no real-time US data; add the US stock bundles in IBKR and share them with the paper account.
- **Trading TWS session is connected from a different IP address** (IBKR error 165): log out of IBKR Mobile, TWS and the IBKR website during US market hours, then Restart IB Gateway.

Tip: Still stuck? Open a support ticket with a screenshot of the AI agent page.

21. Glossary

- **Paper / live**: practice money / real money.
- **Stop-loss**: the price where a losing trade is closed. **Target**: where a winning trade is closed.
- **R**: the distance from entry to stop; 2R means twice that distance in profit.
- **Short**: selling first and buying back later, to profit when the price falls.
- **Lot size**: the volume of an Exness trade (0.01 is a micro lot, 1 a standard lot).
- **VWAP**: the day's volume-weighted average price. **SMA / EMA**: simple / exponential moving averages.
- **RSI**: momentum from 0 to 100. **Timeframe**: the candle length the rules are checked on.