USER GUIDE · V5.0 · ENTERPRISE EDITION

OFFICIAL CUSTOMER HANDBOOK · MIRRORED FROM THE LIVE APP

The EI ALGOS User Guide. Every page. Every workflow. Every screen.

Twenty-seven chapters · seven navigation groups · every trading workflow — documented from the authenticated application with real, annotated screenshots and workflow diagrams. Designed to make every EI ALGOS user successful.

EI ALGOS · BEHAVIORAL DECISION INTELLIGENCE™
LAST UPDATED · FEBRUARY 2026

WWW.EIALGOSINC.COM
Educational tools · Not investment advice

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Everything you'll find inside.

Twenty-seven chapters · seven navigation groups · mirrored 1:1 from the authenticated application. Page numbers below cross-reference the actual PDF pages.

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P00 · WHAT MAKES EI ALGOS DIFFERENT

The 5 Differentiators

Five things you will not find anywhere else — and why they matter to your trading practice.

WHY THIS MATTERS

Understanding these five commitments changes how you use every page that follows. Traders who treat EI ALGOS as a decision-quality workspace — not a signal feed — get compounding value from day one.

DIFFERENTIATOR 1 OF 5

Personalised Decision Intelligence

Every insight is calibrated to your own behaviour, portfolio, and trading history — imported through a secure brokerage connection. You never receive a one-size-fits-all read, because you are not a one-size-fits-all trader.

DIFFERENTIATOR 2 OF 5

Context-Aware AI · LIANA

LIANA reasons about your portfolio, your open trades, and your behavioural patterns — offering neutral, educational decision support in plain language. Never a generic chatbot, never a buy/sell tip.

DIFFERENTIATOR 3 OF 5

Institutional Mindset

Built around institutional trading principles and Smart Money Concepts, EI ALGOS helps retail traders develop the structured, higher-conviction decision process that professionals use.

DIFFERENTIATOR 4 OF 5

Support Throughout The Trade Lifecycle

Most platforms stop helping the moment you enter a trade. EI ALGOS stays with you before, during, and after — planning, live risk management, journaling, and structured review.

DIFFERENTIATOR 5 OF 5

Continuous Learning

Machine-learning models analyse each session, surface recurring behavioural patterns and mistakes, and help you measurably improve future decisions. The platform gets more valuable every week you use it.

They compound. Your broker connection (1) feeds LIANA's context (2); institutional structure (3) shapes every plan you build; lifecycle support (4) generates the behavioural data that continuous learning (5) turns into personalised insight. Use all five and the value multiplies — not adds. Reminder: EI ALGOS provides educational and analytical tools only — you remain solely responsible for every investment decision.

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P00B · HOW YOU'LL USE EI ALGOS

The 5 Trading Workflows

Every trader starts differently. No matter how you begin, every workflow ultimately converges into the same Decision Intelligence Engine, the same Decision Summary, and the same Behavioral Intelligence System.

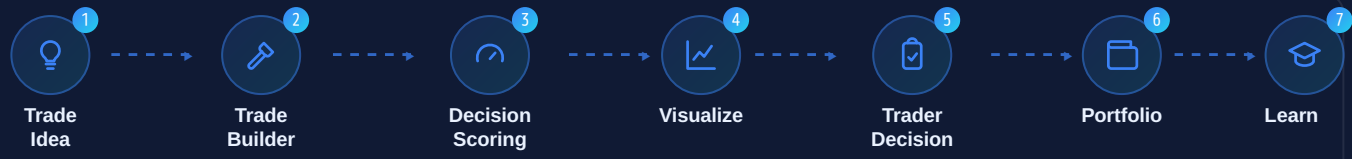
WHY THIS MATTERS

You do not have to change how you trade to benefit from EI ALGOS. Whether you already have an idea, want to scan the market, or ask an AI to research a name for you — every entry path funnels into the same Decision Intelligence Engine, so the quality of the analysis is consistent no matter how you arrived.

3.1 Bring Your Own Trade Idea

POWERED BY TRADE BUILDER

For traders who already have their own trade idea and want EI ALGOS to independently validate it before execution.



BRING YOUR OWN TRADE IDEA → BUILD USING TRADE BUILDER → EVALUATE USING DECISION SCORING → VISUALIZE IN CHARTS → TRADER DECISION → ADD TO PORTFOLIO → LEARN FROM ML ALGORITHMS & BEHAVIORAL SCORES

THE JOURNEY

Trade Idea → Trade Builder → Configure Trade → Risk Parameters → Scenario Evaluation → Decision Summary → Behavioral Review → Execute Using Your Broker → Manually Add Position to Portfolio → Portfolio Monitoring → Behavioral Intelligence → Emotion Score → Trader Intelligence Score

Trade Builder allows traders to manually build stock or options positions using their own market thesis.

TRADER CONFIGURES

- Symbol
- Direction
- Strategy
- Entry
- Stop
- Position Size
- Targets

PLATFORM CALCULATES

- Risk / Reward
- Breakeven
- Greeks (Options)
- Expected P/L
- Institutional price levels
- Smart Money Concepts
- Winner Extension
- Target 2
- Intelligent Trailing Logic

Once completed, the trade is evaluated through the Decision Intelligence Engine v5.0 before the trader decides whether to proceed.

COMPLIANCE

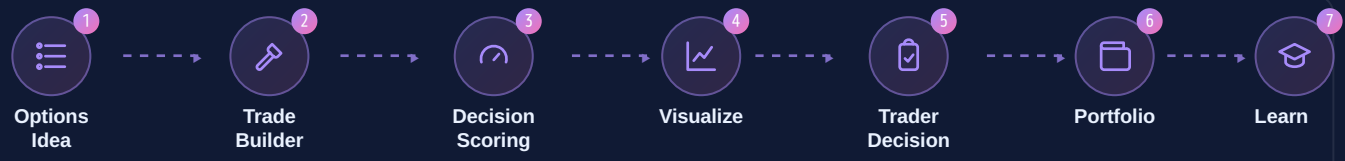
EI ALGOS does NOT place trades. Users remain solely responsible for executing trades through their own brokerage account. Portfolio entries inside EI ALGOS are used for behavioral analytics, journaling, monitoring, and performance tracking. Broker synchronization (including future SnapTrade-supported integrations) is intended only to simplify portfolio reconciliation where supported and does not authorize or automate trade execution.

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3.2 Analyze an Existing Options Strategy

POWERED BY OPTIONS ANALYSIS

Designed for traders who already know which options strategy they wish to evaluate.



BRING YOUR OWN OPTIONS TRADE IDEA → BUILD USING TRADE BUILDER → EVALUATE USING DECISION SCORING → VISUALIZE IN CHARTS → TRADER DECISION → ADD TO PORTFOLIO → LEARN FROM ML ALGORITHMS & BEHAVIORAL SCORES

THE JOURNEY

Select Option Strategy → Configure Legs → Greeks → P/L Diagram → Risk Summary → Visualize Levels → Decision Summary → Execute Using Broker → Portfolio

Users can manually construct strategies including Verticals, Iron Condors, Butterflies, Calendars, Straddles, Strangles, Covered Calls, Protective Puts, Debit Spreads, and Credit Spreads.

PLATFORM DISPLAYS

Greeks · Probability metrics · P/L diagrams · Risk exposure · Breakeven · Max Profit · Max Loss

THE VISUALIZE BUTTON

The Visualize feature overlays important support, resistance, institutional levels, Smart Money Concepts, entries, stops and targets directly on the interactive chart — helping traders understand the trade within current market structure before making a decision.

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3.3 Scan Today's Best Opportunities

POWERED BY QUICK SETUPS

For traders who do not already have a trade idea. This workflow starts on the Market Intelligence page, where Quick Setups — one of its two discovery engines — continuously scans the market looking for high-quality opportunities that satisfy the platform's analytical framework.



LOOK UP STOCK / OPTIONS TRADE IDEAS FROM MARKET INTELLIGENCE (QUICK SETUPS) → BUILD USING TRADE BUILDER → EVALUATE USING DECISION SCORING → VISUALIZE IN CHARTS → TRADER DECISION → ADD TO PORTFOLIO → LEARN FROM ML ALGORITHMS & BEHAVIORAL SCORES

THE JOURNEY

Open Market Intelligence → Select Watchlists → Market Scan → Scenario Detection → Signal Quality → Candidate List → Decision Summary → Open Trade Builder (Optional) → Execute → Portfolio

This workflow begins on the Market Intelligence page — home to the platform's two discovery engines: Quick Setups and the Strategy Pattern Detector.

Quick Setups applies multi-factor confluence scoring across 572+ tickers — validating volume, trend alignment, momentum, volatility environment, and Smart Money Concepts structure. Every setup passes an 8-stage pipeline with regime gating, anti-noise filtering, and entry precision validation.

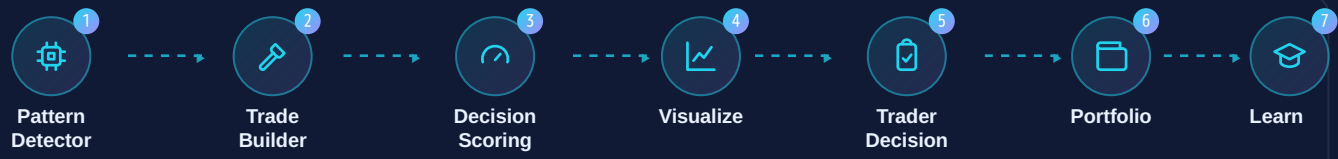
Quick Setups is NOT generating personalized investment advice or trade recommendations. It simply organizes market opportunities using the platform's evaluation framework so traders can conduct their own independent analysis.

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3.4 Discover Institutional Trading Patterns

POWERED BY STRATEGY PATTERN DETECTION

For traders looking to discover detected chart structures and institutional trading patterns before manually validating them. Like Quick Setups, this workflow starts on the Market Intelligence page — the Strategy Pattern Detector is its second discovery engine.



LOOK UP STOCK / OPTIONS INSTITUTIONAL STRATEGY PATTERN IDEAS FROM MARKET INTELLIGENCE (STRATEGY PATTERN DETECTOR) → BUILD USING TRADE BUILDER → EVALUATE USING DECISION SCORING → VISUALIZE IN CHARTS → TRADER DECISION → ADD TO PORTFOLIO → LEARN FROM ML ALGORITHMS & BEHAVIORAL SCORES

THE JOURNEY

Open Market Intelligence → Strategy Pattern Detector → 21 Chart Patterns → Pattern Confidence Scoring → Institutional Confluence → SMC Stops & Targets → Decision Summary → Review Charts → Trade Builder (Optional) → Execute → Portfolio

Both Quick Setups and the Strategy Pattern Detector are launched from the Market Intelligence page — two discovery engines fed by the same market scan.

The Strategy Pattern Detector identifies 21 chart patterns — Bull/Bear Flags, Pennants, Triangles, Double Top/Bottom, Head & Shoulders, Cup & Handle, Wedges, VWAP Reversion, EMA Pullback, and Range Breakouts — each with pattern-specific confidence scoring.

Every detection is validated through the same confluence and SMC-based stop/target pipeline as Quick Setups, then independently evaluated by the Decision Intelligence Engine before being presented to the user.

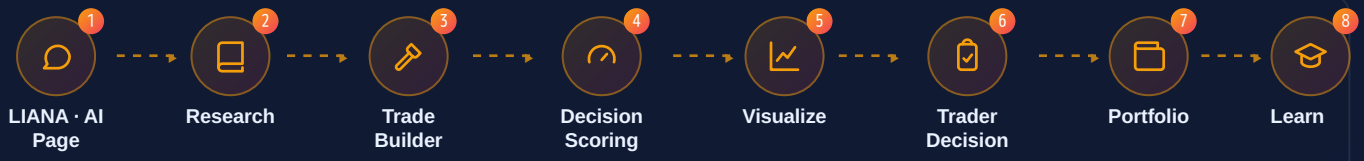
The trader always retains complete discretion over whether any opportunity should be acted upon. Pattern detection is analytical only and should not be interpreted as investment advice or a recommendation to trade.

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3.5 Research Any Stock with AI

POWERED BY LIANA & AI-ASSISTED ANALYSIS

This workflow begins with a stock selected by the trader — and there are two equivalent ways to run it: ask LIANA directly, or open the dedicated AI-Assisted Analysis page. Unlike Quick Setups (which begins with a market scan), both paths begin with a specific security the user wants to research.



ASK LIANA OR GO TO THE AI-ASSISTED ANALYSIS PAGE FOR YOUR SPECIFIC STOCK(S) OR OPTION(S) → RESEARCH FROM FEEDBACK PROVIDED → BUILD USING TRADE BUILDER → EVALUATE USING DECISION SCORING → VISUALIZE IN CHARTS → TRADER DECISION → ADD TO PORTFOLIO → LEARN FROM ML ALGORITHMS & BEHAVIORAL SCORES

THE JOURNEY

Choose Stock → Ask LIANA or Open AI-Assisted Analysis → Market Research → Technical Structure → Institutional Context → Behavioral Considerations → Decision Summary → Trade Builder (Optional) → Execute → Portfolio

Two entry points, one research engine. LIANA is the conversational path — open the orb from any page and ask about the stock you have in mind. The AI-Assisted Analysis page is the structured path — a dedicated workspace that produces the same stock-specific research as a full, page-based report.

Asking LIANA about a specific stock and running that stock through the AI-Assisted Analysis page are equivalent: both consolidate market research, technical structure, institutional context, and behavioral considerations for the security you chose.

Quick Setups starts with the market. This workflow starts with YOUR stock. Quick Setups discovers opportunities. LIANA and AI-Assisted Analysis research them.

Neither LIANA nor the AI-Assisted Analysis page provides personalized financial advice or recommendations. Both consolidate technical, institutional, behavioral and platform intelligence into a single research experience to help traders make more informed decisions.

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All Roads Lead to Decision Support

Every module ultimately uses the exact same evaluation engine.

Bring Your Own Trade Idea | **Options Analysis** | **Quick Setups** | **Pattern Detection** | **AI-Assisted Analysis**

↓ ↓ ↓ ↓ ↓

Decision Intelligence Engine v5.0

- **Decision Summary**
- **Behavioral Intelligence**
- **Emotion Score**
- **Trader Intelligence Score**
- **Execute Using Broker**
- **Portfolio Monitoring**
- **Continuous Learning**

IMPORTANT · REGULATORY DISCLOSURES · UNITED STATES & CANADA

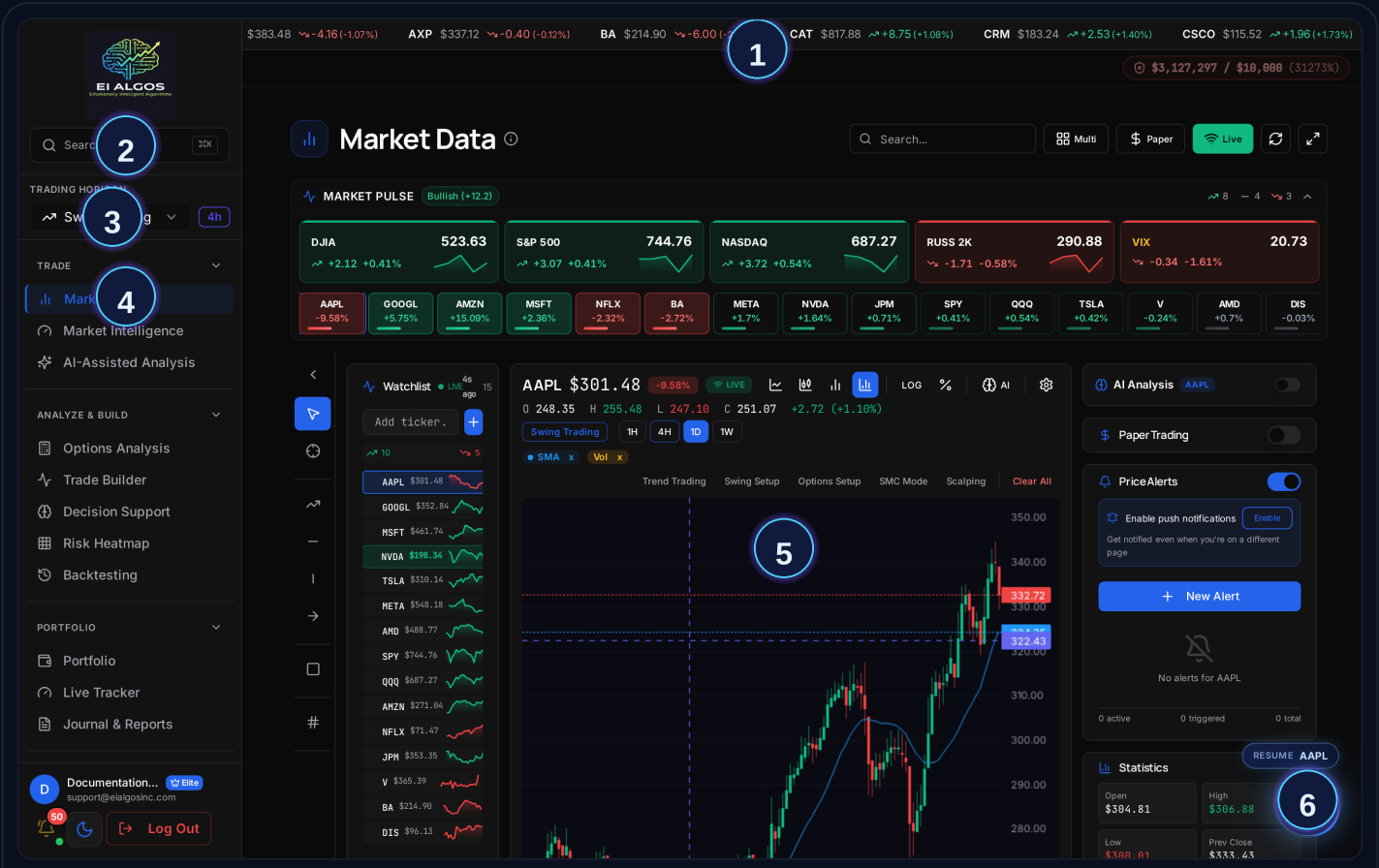
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P01 · TRADE · MARKET OVERVIEW `/market`

Market

The daily read on the market — regime, movers, and structural context.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

Most losing trades begin with a market-context mistake, not a stock-picking mistake. Thirty seconds on this page tells you whether today rewards patience or activity — so every decision that follows starts from the right frame.

→ Numbered Callouts

1. **Live Ticker Tape** — Rolling snapshot of major symbols with live price and % change, colour-coded green/red.
2. **Global Search** — Symbol / feature / journal search. Press ⌘K to focus from anywhere.
3. **Trading Horizon** — Swing / Day / Position — sets the timeframe context for the whole workspace.
4. **Left Sidebar** — The five navigation groups — always visible.

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5 **Market Pulse + Chart Canvas** — Indices, movers, and the live candlestick chart for the selected symbol.

6 **LIANA Beacon** — Open the AI assistant to ask about anything on this screen.

WORKFLOW · THIS PAGE AT A GLANCE

Open Market → Confirm Horizon → Read Regime → Pick Symbol

PURPOSE
Give you a calm, curated view of what is happening across the market today.

WHY IT EXISTS
Context matters. Understanding the current regime shapes how you evaluate every setup that follows.

PREREQUISITES
Signed-in account.

WHEN TO USE
First screen of every trading session.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open the Market page from the left sidebar.
2. Scan the top ticker tape for the day's most active symbols.
3. Confirm your Trading Horizon (top-left) matches the timeframe you plan to trade.
4. Review the market read and note the current regime.
5. Move to Market Intelligence for deeper regime analytics, or to a symbol page for structural analysis.

EXPECTED OUTCOME
You end this screen with a clear sense of what kind of market day this is — trending, choppy, or event-driven.

SCREEN STATES

Loading — Initial ticker fetch — usually resolves in under 3 seconds.

Live — Ticker tape scrolls; prices update in near-real time during market hours.

After Hours — Last-traded price is shown with an ‘After Hours’ tag.

No Data — If a symbol's feed is temporarily unavailable, a dash is shown in place of price.

TIPS

Take 30 seconds to notice regime before you open any symbol.

The ticker tape is scroll-only — click a symbol to open its detail page.

COMMON MISTAKES

Skipping this page and jumping straight to a symbol you have a bias about.

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KEYBOARD SHORTCUTS

⌘K · Focus search

G M · Jump to Market

MOBILE / TABLET NOTES

On mobile, the ticker tape collapses to a horizontal scroll. Sidebar becomes a bottom navigation drawer.

TROUBLESHOOTING

Ticker frozen? Refresh the page — the feed reconnects automatically.

Wrong horizon showing? Switch it in the top-left dropdown.

RELATED PAGES

Market Intelligence

AI-Assisted Analysis

Trader Intelligence · Dashboard

FREQUENTLY ASKED

Q: Is this real-time? — A: Prices are near-real-time (typically <5s delay).

Q: Can I customise the ticker list? — A: The ticker uses your active Watchlist. Edit it from any Watchlist card.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

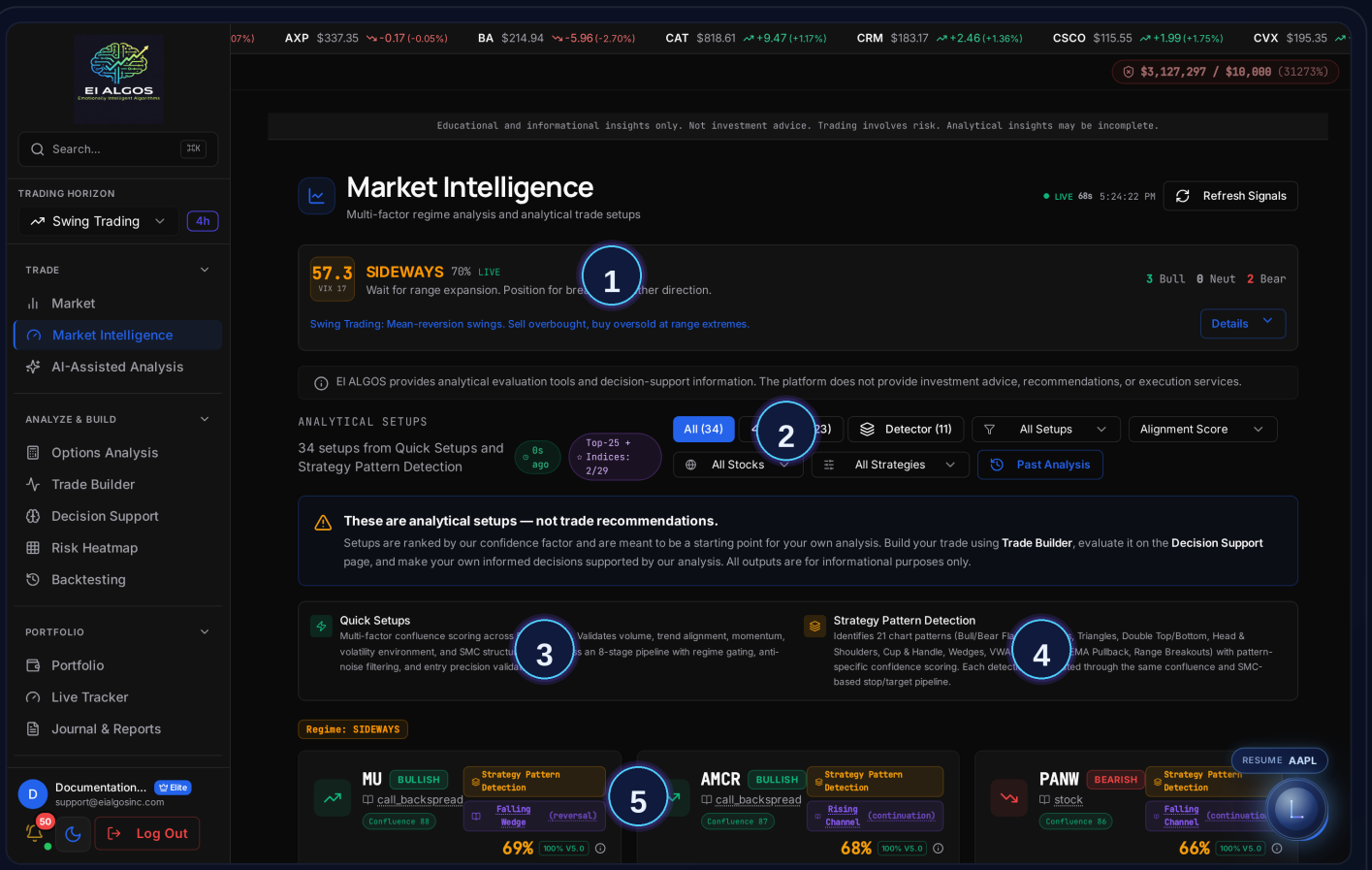
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P02 · TRADE · MARKET INTELLIGENCE | /market-intelligence | PRO & ELITE PLANS

Market Intelligence

Regime-aware analytics — how today looks versus history.



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WHY THIS MATTERS

Knowing that today structurally resembles past regimes changes how much conviction a setup deserves. Instead of trading every day the same way, you calibrate expectations to the environment — the habit that most separates professionals from beginners.

→ Numbered Callouts

1. **Regime Banner** — Names today's regime (e.g. SIDEWAYS), its confidence, VIX context, and a horizon-specific read.
2. **Analytical Setups Toolbar** — Filter the ranked setups: All / Quick / Detector, stock and strategy filters, alignment sorting.
3. **Quick Setups Engine** — Multi-factor confluence scoring across 572+ tickers with an 8-stage validation pipeline.
4. **Strategy Pattern Detection** — 21 chart patterns detected and validated through the same confluence and SMC pipeline.

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5 **Ranked Setup Cards** — Each card shows ticker, bias, detection source, confluence score, and alignment %.

WORKFLOW · THIS PAGE AT A GLANCE

Open Regime Card → Study Comparables → Read Commentary → Return With Context

PURPOSE
Give you an educational, historical read on the current market regime.

WHY IT EXISTS
A structured comparison to past regimes deepens your understanding of what today might behave like.

PREREQUISITES
Pro-tier subscription or higher.

WHEN TO USE
Before you commit meaningfully to a new position, or during study sessions.

WHO SHOULD USE
Pro and Elite users.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Open Market Intelligence from the left sidebar.
2. Read the Regime Card at the top.
3. Scroll through Historical Comparables to see analog periods.
4. Ask LIANA to explain any panel that is unclear.
5. Return to a symbol or the Trade Builder with regime context in mind.

EXPECTED OUTCOME
You leave with an analog-informed sense of today's market posture.

SCREEN STATES

Ready — All panels populated with the latest analytics.

Recomputing — Intraday updates may briefly show a 'Refreshing' indicator.

Subscription Required — If your plan does not include this page, a friendly upgrade card is shown.

TIPS
Cross-reference the Regime Card with your Trading Horizon — different horizons emphasise different regime signals.

COMMON MISTAKES
Treating a regime label as a directive. It is context, not a call.

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KEYBOARD SHORTCUTS

G I · Jump to Market Intelligence

MOBILE / TABLET NOTES

Panels stack vertically. Charts remain readable via horizontal swipe.

TROUBLESHOOTING

Comparables not loading? Check your internet connection — Market Intelligence relies on historical data pulls.

RELATED PAGES

- Market
- Backtesting
- Decision Support

FREQUENTLY ASKED

Q: How often is regime recalculated? — A: Multiple times per session, at rate-limited cadence.

Q: Are historical comparables curated? — A: They are structurally matched — not cherry-picked.

ACCESSIBILITY

- Full keyboard navigation supported
- ARIA labels on interactive elements
- WCAG AA colour contrast throughout
- Screen reader friendly

IMPORTANT REMINDER

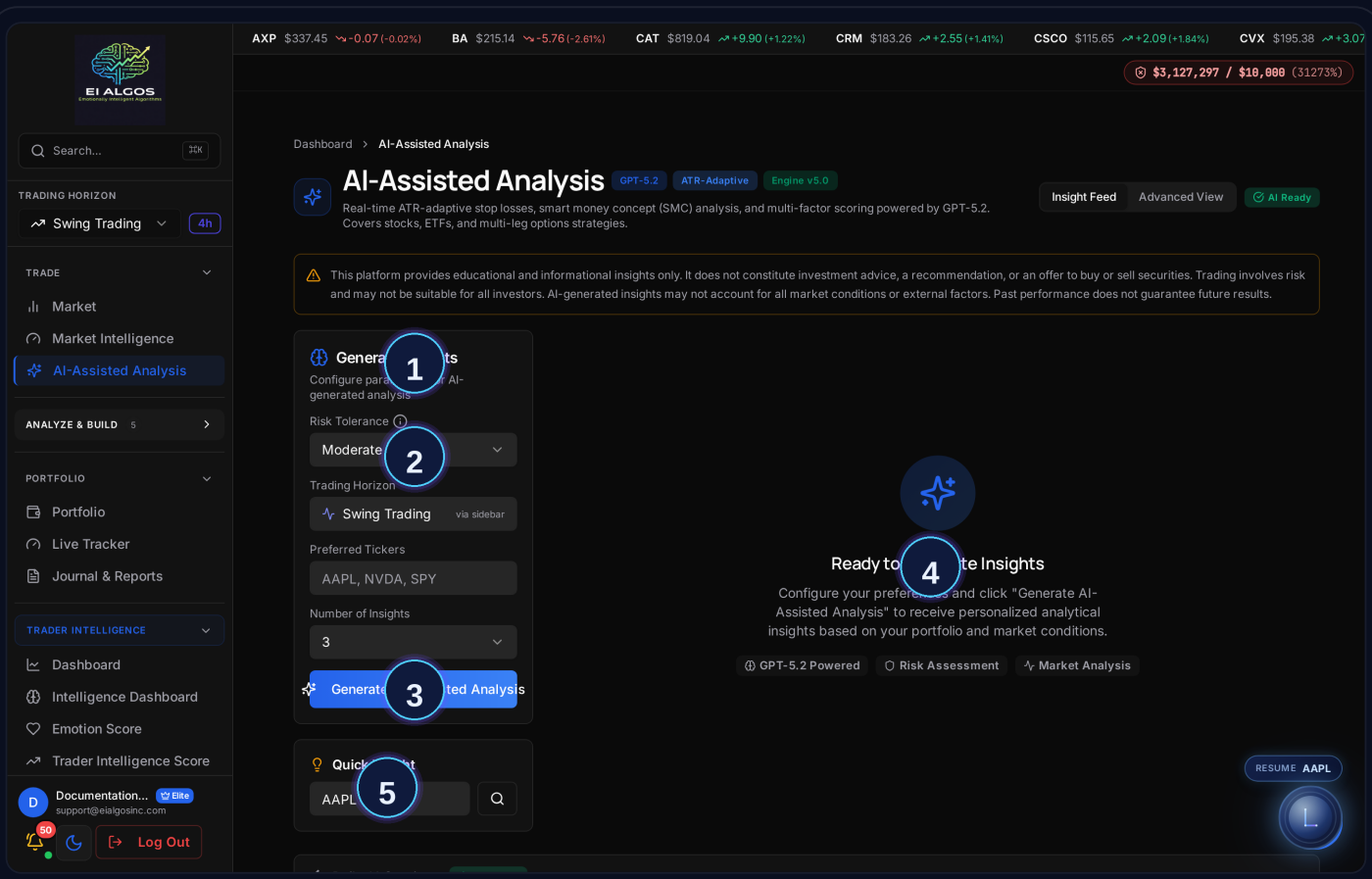
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P03 · TRADE · AI-ASSISTED ANALYSIS `/ai-insights`

AI-Assisted Analysis

A calm second read — powered by GPT-5.2, tagged and audited.



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WHY THIS MATTERS

Reading a well-structured analytical brief before acting slows the impulse loop that damages most retail accounts. You get an institutional-quality second read in seconds — with the depth dialed to exactly your level.

→ Numbered Callouts

1. **Generate Insights Configurator** — Set Risk Tolerance, Trading Horizon, and preferred tickers before generating.
2. **Risk Tolerance + Horizon** — Conservative / Moderate / Aggressive — analysis depth adapts to your profile.
3. **Generate Button** — Runs the GPT-5.2-powered analysis pipeline against live market data.
4. **Insight Canvas** — Generated analytical insights render here — scenario-based, educational, model-tagged.

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5 **Quick Insight** — One-ticker express analysis when you don't need the full configuration.

WORKFLOW · THIS PAGE AT A GLANCE

Choose Topic → Set Depth → Read Commentary → Follow Up

PURPOSE
Provide educational, model-tagged commentary on the market and your watchlist.

WHY IT EXISTS
A structured second opinion — from a transparent AI — helps you slow down and evaluate.

PREREQUISITES
Signed-in account.

WHEN TO USE
Any time you want an educational read alongside your own analysis.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open AI-Assisted Analysis.
2. Choose the topic (Market read, Watchlist review, or specific symbol).
3. Choose the depth level.
4. Read the commentary and follow-up on anything unclear.

EXPECTED OUTCOME
You have a written, structured educational read to consider alongside your own analysis.

SCREEN STATES

Idle — Waiting for you to choose a topic.

Generating — The model tag appears immediately; content streams in.

Complete — Final commentary with an audit tag.

Rate Limited — Rare — you will see a friendly 'please retry' notice.

TIPS

Never treat AI commentary as advice — it is analytical context, always educational.

Ask for the 'bear case' before you ask for the 'bull case' — trains discipline.

COMMON MISTAKES

Asking 'what should I buy?' — the model will not answer, by design.

KEYBOARD SHORTCUTS

G A · Jump to AI-Assisted Analysis

MOBILE / TABLET NOTES

Fully responsive. Depth selector collapses into a segmented control.

TROUBLESHOOTING

Long wait? Check your Universal-Key balance in your account profile.

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RELATED PAGES

Market

Decision Support

AI Copilot (LIANA)

FREQUENTLY ASKED

Q: Which model is used? — A: The active model is shown in every reply's tag.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

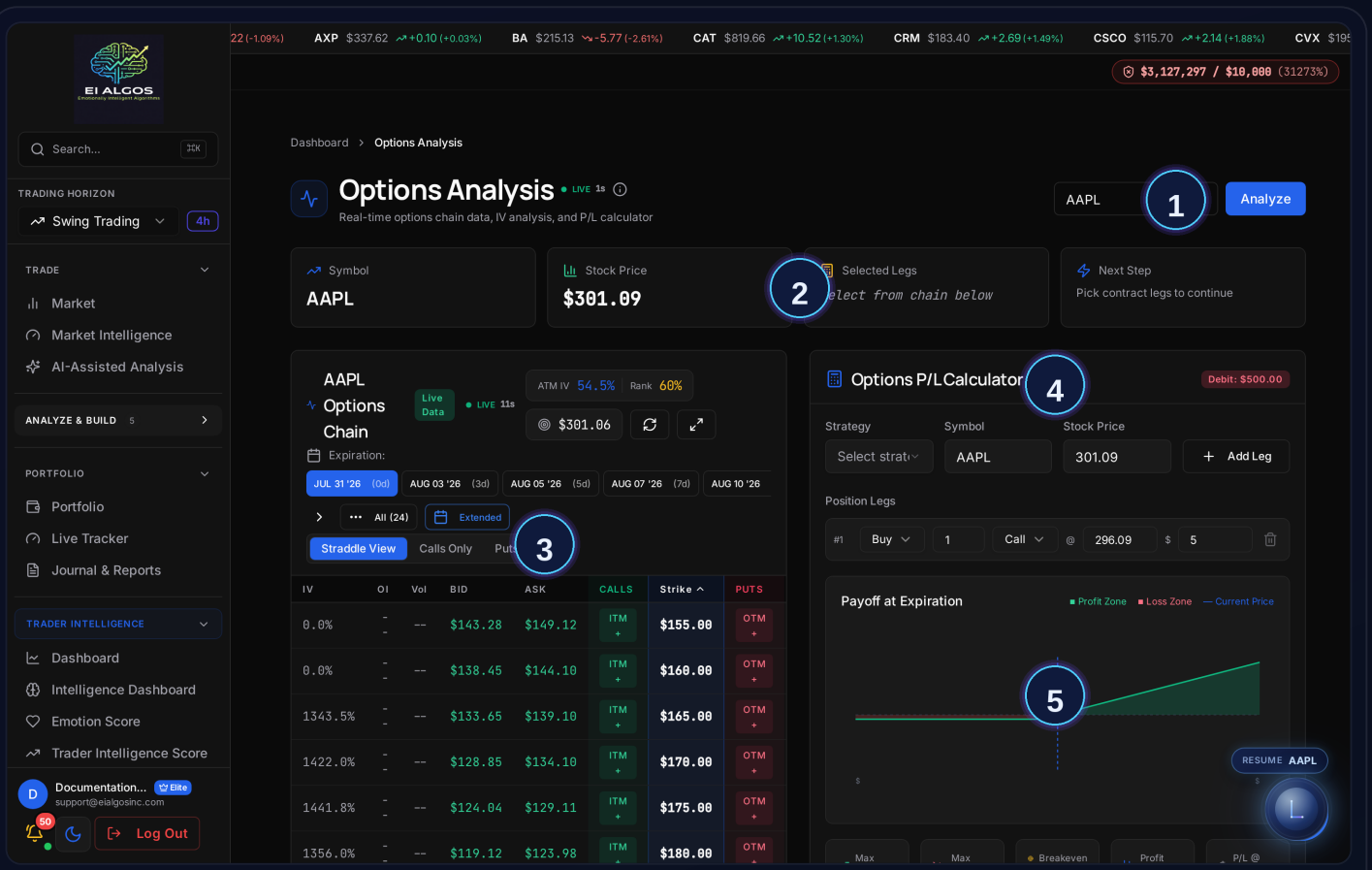
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P04 · ANALYZE & BUILD · OPTIONS | /options | PRO & ELITE PLANS

Options Analysis

Understand what a spread costs, risks, and requires.



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WHY THIS MATTERS

Options losses usually come from not understanding the position's shape before entry. Seeing payoff, breakeven, and capital-at-risk visually — before you commit a dollar — turns a guess into an informed, structured evaluation.

→ Numbered Callouts

1. **Symbol Search + Analyze** — Type any ticker and press Analyze to load its live chain.
2. **Context Tiles** — Symbol · live Stock Price · Selected Legs · Next Step — your position-building status bar.
3. **Live Options Chain** — Real-time chain with IV, OI, volume, bid/ask, and ITM/OTM badges per strike.
4. **Options P/L Calculator** — Build legs and see debit/credit, breakeven, and max profit/loss computed live.

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5 **Payoff At Expiration** — Visual profit/loss curve across price outcomes — understand the shape before committing.

WORKFLOW · THIS PAGE AT A GLANCE

Pick Strategy → Adjust Legs → Review Payoff → Send To Builder

PURPOSE
Educational tools for evaluating multi-leg options positions.

WHY IT EXISTS
Options are unforgiving of poor evaluation. The workspace slows you down and structures the study.

PREREQUISITES
Pro-tier subscription and options-approved broker.

WHEN TO USE
Any time you evaluate an options trade.

WHO SHOULD USE
Pro & Elite users with options-approved brokerage accounts.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Open Options Analysis from the sidebar.
2. Select the underlying symbol.
3. Choose a strategy category.
4. Read the payoff diagram and educational summary.
5. Send the constructed idea to Trade Builder if you decide to move forward.

EXPECTED OUTCOME
You understand the geometry of the position before you enter it.

SCREEN STATES

No Chain — Some symbols may not have an options chain — you'll see a friendly notice.

Building — As you adjust legs, the payoff and educational summary recompute.

Complete — A finalised, printable educational summary of the position.

TIPS
Always read Max Loss before Max Gain.

COMMON MISTAKES
Sizing by 'what I would love to make' instead of 'what I can afford to lose'.

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KEYBOARD SHORTCUTS

G O · Jump to Options

MOBILE / TABLET NOTES

Payoff diagram is touch-zoomable. Strategy legs are edited in a bottom sheet.

TROUBLESHOOTING

Missing chain? Confirm the symbol has listed options and market hours coverage.

RELATED PAGES

- Trade Builder
- Risk Heatmap
- Portfolio

FREQUENTLY ASKED

Q: Is this real-time chain data? — A: Chains use near-real-time quotes; check the delay stamp on the panel.

ACCESSIBILITY

- Full keyboard navigation supported
- ARIA labels on interactive elements
- WCAG AA colour contrast throughout
- Screen reader friendly

IMPORTANT REMINDER

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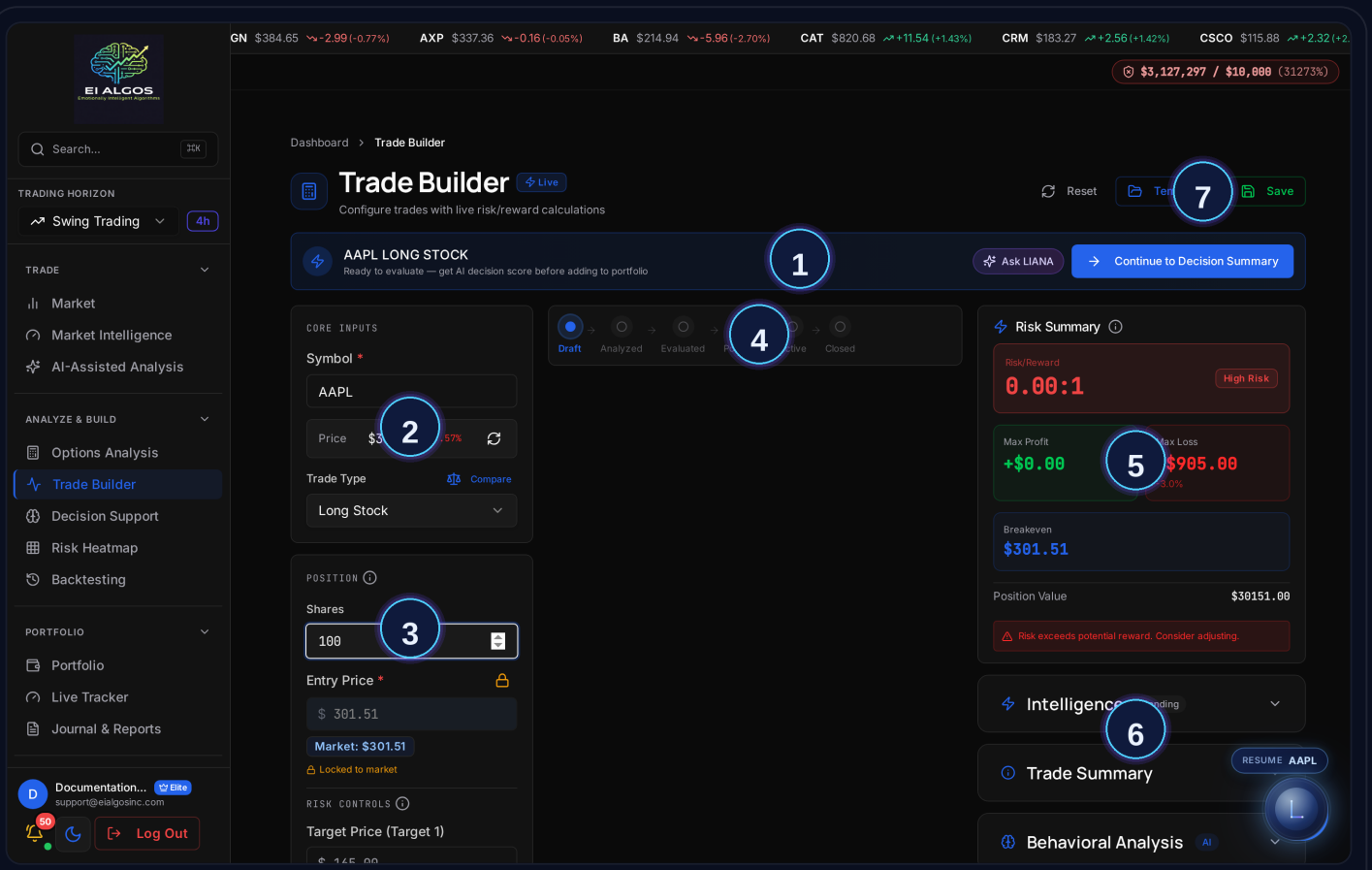
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P05 · ANALYZE & BUILD · TRADE BUILDER

/trade-builder

Trade Builder

Design the trade — before your broker sees it.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

A written plan with predefined risk is the single highest-leverage habit in trading. This page makes the plan take two minutes instead of twenty — so you actually build one for every trade, not just the ones you feel unsure about.

→ Numbered Callouts

1. **Evaluate CTA Banner** — Once inputs are complete, continue to Decision Summary for the full multi-factor evaluation.
2. **Core Inputs** — Symbol, live locked price, and Trade Type (34 strategies).
3. **Position Panel** — Shares/contracts, entry price (market-locked), and cost preview.
4. **Lifecycle Stepper** — Draft → Analyzed → Evaluated → Portfolio → Active → Closed — every trade's journey.

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5 **Risk Summary** — Live Risk/Reward ratio, Max Profit, Max Loss, Breakeven, and Position Value.

6 **Intelligence Panels** — Emotion Score and Trader Intelligence context beside every plan you build.

7 **Save / Templates / Reset** — Save the plan, load a template, or start over.

WORKFLOW · THIS PAGE AT A GLANCE

Enter Symbol → Size Position → Set Risk → Save Plan

PURPOSE
Construct a fully-planned educational trade: symbol, sizing, entry, stop, target, and journal reflection.

WHY IT EXISTS
A structured plan makes impulse execution harder — and disciplined execution easier.

PREREQUISITES
Signed-in account. Broker connection optional.

WHEN TO USE
Every time you consider taking a position.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Enter the symbol.
2. Choose trade type (long / short / options-plan).
3. Set shares and entry price.
4. Set target and stop.
5. Review the live Risk Summary.
6. Review Intelligence + Emotion + TIS panels.
7. Save the plan — send to your broker when ready.

EXPECTED OUTCOME
A trade you have planned, sized, and consciously chosen — with a clear risk envelope.

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SCREEN STATES

Draft — You are entering data.

Analyzed — The system has computed educational context — but not evaluated fit-to-plan.

Evaluated — The system has cross-checked the plan against your risk rules.

Portfolio — The plan is saved to your Portfolio for tracking.

Active — The trade has been (externally) executed at your broker.

Closed — The trade is complete — moves to Trade Review.

TIPS

If the Trade Builder feels tedious, that's the point — it is the deliberate step.

COMMON MISTAKES

Overriding your own risk rule ‘just this once’.

KEYBOARD SHORTCUTS

G T · Jump to Trade Builder

⌘ S · Save current plan

MOBILE / TABLET NOTES

The workflow stepper collapses into a segmented pill. Risk Summary docks to the top.

TROUBLESHOOTING

Risk Summary not updating? Confirm all four fields (entry, target, stop, shares) are populated.

Cannot save? Confirm you're signed in and your subscription is active.

RELATED PAGES

Options Analysis

Decision Support

Portfolio

Risk Heatmap

FREQUENTLY ASKED

Q: Does Trade Builder place my order? — A: Only if you explicitly grant trade permissions to a connected broker.

Q: Can I use templates? — A: Yes — save any completed plan as a reusable template.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

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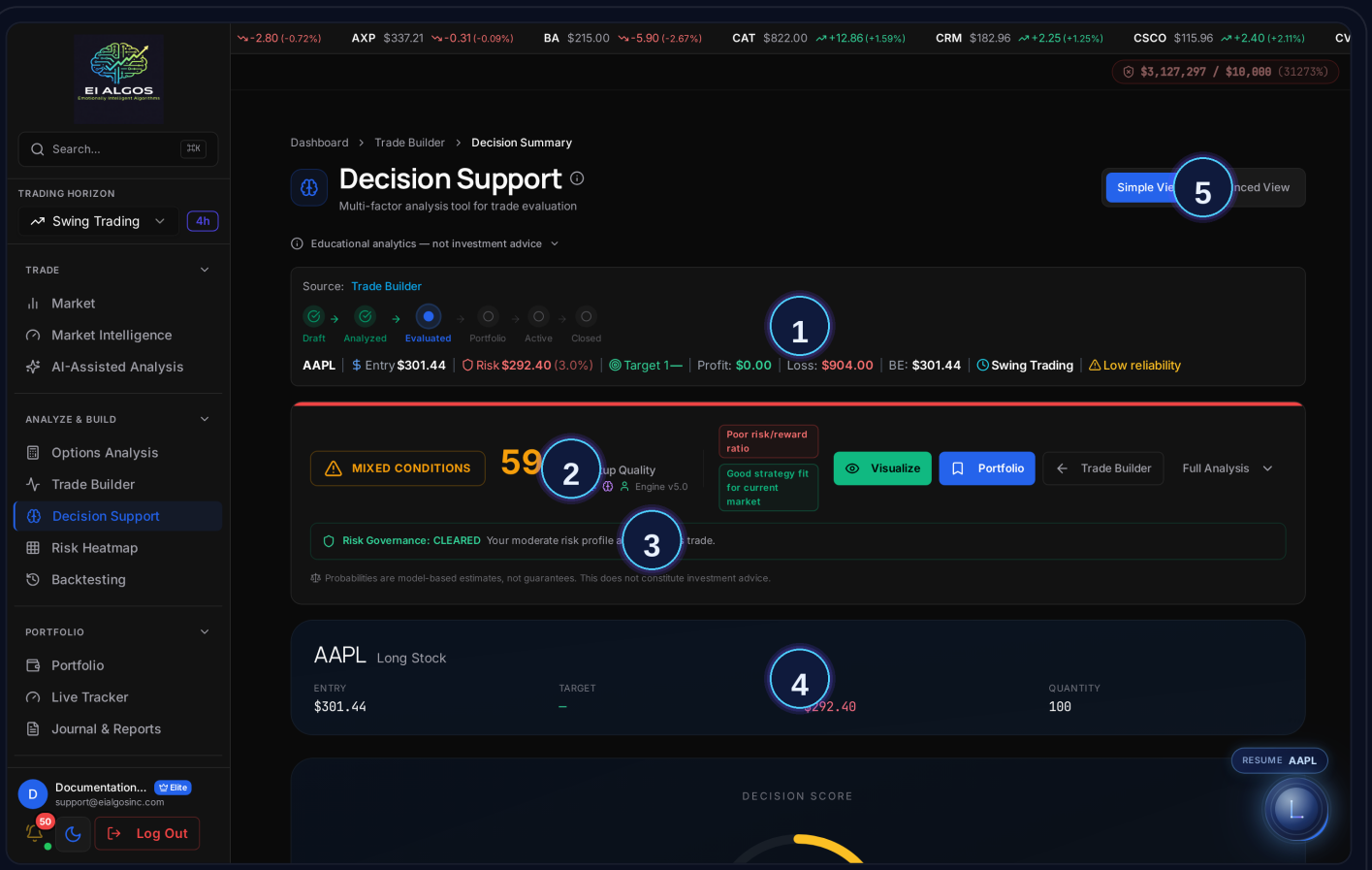
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P06 · ANALYZE & BUILD · DECISION SUPPORT

/decision-engine

Decision Support

A structured, transparent evaluation — one page, every angle.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

Before capital is at risk, you see the same setup through three independent lenses — structure, regime, and your own behaviour. That third lens is the one no other platform offers, and it is the one that catches your costliest mistakes.

→ Numbered Callouts

1. **Lifecycle + Trade Strip** — Source, lifecycle stage, and the exact parameters being evaluated (entry, risk, targets, R/R).
2. **Setup Quality Verdict** — The headline evaluation — conditions label, Setup Quality %, and engine version.
3. **Risk Governance Strip** — Confirms whether the trade cleared your personal risk profile rules.
4. **Trade Parameters Card** — Entry · Target · Stop · Quantity — exactly what was scored.

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5 **Simple / Advanced Toggle** — Switch between the plain-language verdict and the full quantitative breakdown.

WORKFLOW · THIS PAGE AT A GLANCE

Open Summary → Read 3 Panels → Expand 'Why' → Ask LIANA

PURPOSE
Give you an educational, side-by-side evaluation of a setup across structural, regime, and behavioural context.

WHY IT EXISTS
Structured evaluation replaces improvised opinion.

PREREQUISITES
A symbol selected in Trade Builder or from your Watchlist.

WHEN TO USE
Any time you seriously consider a trade.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open Decision Support from Trade Builder or any symbol page.
2. Read the three panels: structural, regime, behavioural.
3. Expand any ‘why’ card for a plain-language explanation.
4. Ask LIANA for deeper context on anything unclear.
5. Return to Trade Builder with a decision.

EXPECTED OUTCOME
A coherent view of the case for — and the case against — this specific setup.

SCREEN STATES

Ready — All three panels populated.

Refreshing — Panels recompute when you change symbol or horizon.

Incomplete — If any input is missing, that specific panel is greyed out.

TIPS
Read the ‘why’ notes first. Skipping them turns Decision Support into a slot machine.

COMMON MISTAKES
Reading only the summary and ignoring the individual panel commentary.

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KEYBOARD SHORTCUTS

G D · Jump to Decision Support

MOBILE / TABLET NOTES

Panels stack; the ‘why’ cards expand full-screen when tapped.

TROUBLESHOOTING

Panel greyed out? Confirm the symbol has enough historical data for that specific context.

RELATED PAGES

- Trade Builder
- Behavioural Intelligence
- Emotion Score
- AI Copilot (LIANA)

FREQUENTLY ASKED

Q: Does a high summary mean I should buy? — A: No. It is educational context only. See disclosures on the page.

ACCESSIBILITY

- Full keyboard navigation supported
- ARIA labels on interactive elements
- WCAG AA colour contrast throughout
- Screen reader friendly

IMPORTANT REMINDER

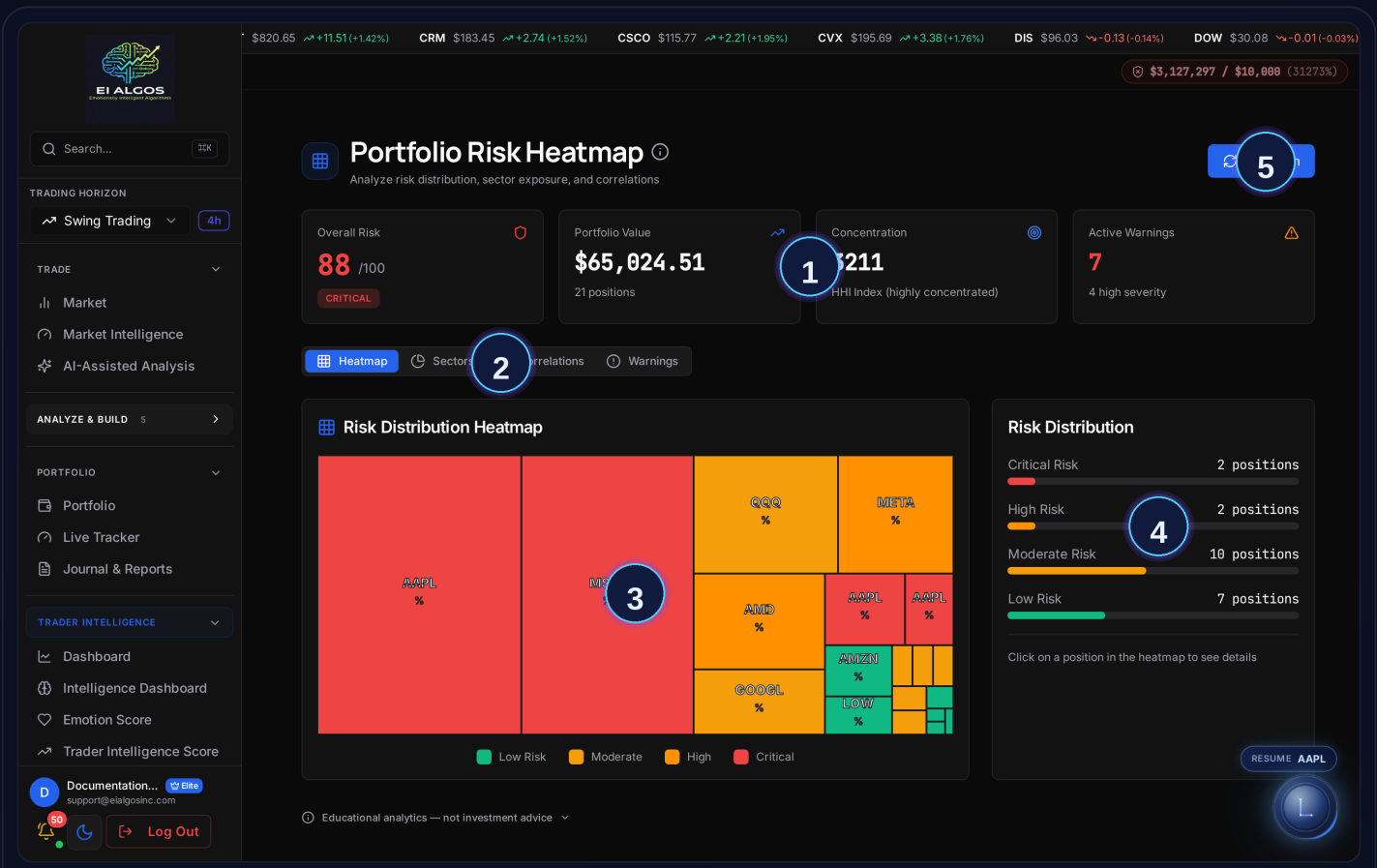
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P07 · ANALYZE & BUILD · RISK HEATMAP | /risk-heatmap | PRO & ELITE PLANS

Risk Heatmap

See your risk — before it becomes obvious in P&L.



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WHY THIS MATTERS

Portfolio blow-ups rarely come from one bad trade — they come from five correlated ones. This page shows concentration and correlation at a glance, so you catch hidden clustering before the market does.

→ Numbered Callouts

1. **Portfolio Risk KPIs** — Overall Risk score, Portfolio Value, Concentration index, and Active Warnings.
2. **View Tabs** — Heatmap · Sectors · Correlations · Warnings — four lenses on the same portfolio.
3. **Risk Distribution Heatmap** — Treemap sized by exposure, coloured by risk band — concentration is visible instantly.
4. **Risk Distribution Panel** — Position counts per risk band; click any tile in the heatmap for details.

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5 **Refresh** — Recompute the full risk snapshot on demand.

WORKFLOW · THIS PAGE AT A GLANCE

Scan Concentration → Read Correlation → Adjust Sizing → Verify Total Risk

PURPOSE
Visualise concentration, correlation, and per-trade risk across your open + planned positions.

WHY IT EXISTS
Blow-ups almost never come from a single trade — they come from correlated bets that felt independent.

PREREQUISITES
At least one open or planned position.

WHEN TO USE
Before you add a new position, and weekly as a health check.

WHO SHOULD USE
Pro & Elite users.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Open Risk Heatmap.
2. Scan the concentration grid — anything red is worth a second look.
3. Review the correlation cluster.
4. Adjust sizing in Trade Builder for any position that pushes total risk above your plan.

EXPECTED OUTCOME
A visual, unambiguous read on your actual portfolio risk.

SCREEN STATES

Populated — Fully computed heatmap.

Empty — If you have no positions, a friendly 'get started' card is shown.

Recalculating — After you edit any position, the heatmap recomputes.

TIPS
Run this before opening any new position — especially on a strong day.

COMMON MISTAKES
Assuming diversification because you own many symbols. Correlation matters more than count.

KEYBOARD SHORTCUTS
G R · Jump to Risk Heatmap

MOBILE / TABLET NOTES
Grid is horizontally scrollable. Correlation view uses a compact chord-style visual.

TROUBLESHOOTING
Numbers unexpected? Ensure your Portfolio positions are up-to-date.

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RELATED PAGES

Trade Builder

Portfolio

Live Tracker

FREQUENTLY ASKED

Q: Does this include cash? — A: Cash is treated as risk-free and excluded from correlation.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

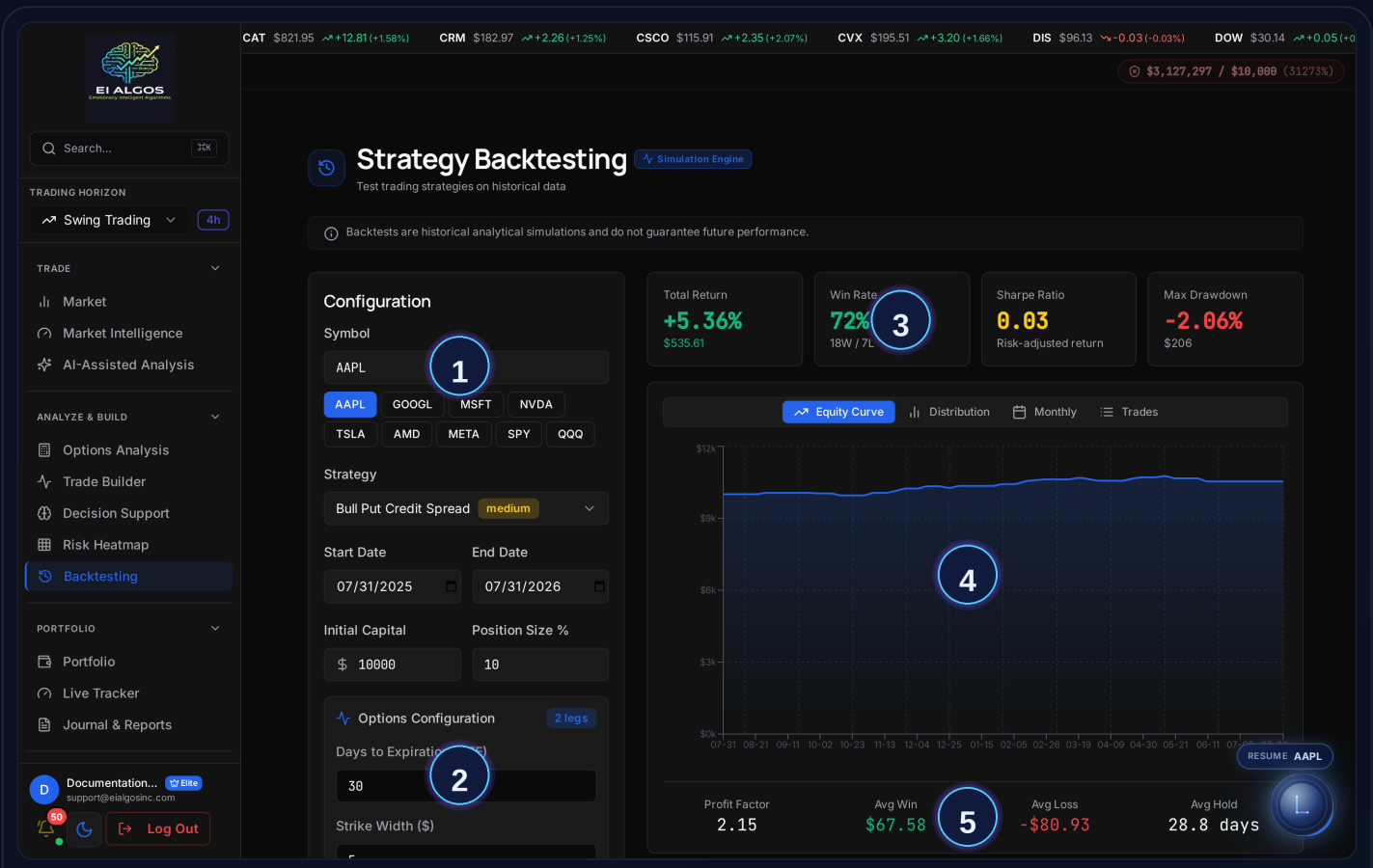
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P08 · ANALYZE & BUILD · BACKTESTING | /backtesting | PRO & ELITE PLANS

Backtesting

Study your strategies — under retail-realism constraints.



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WHY THIS MATTERS

Testing a strategy against history converts 'I think this works' into 'here is how this behaved.' You build realistic expectations about drawdowns and win rates before real money teaches you the expensive way.

→ Numbered Callouts

1. **Configuration Panel** — Symbol, strategy, date window, capital, and position sizing for the simulation.
2. **Options Configuration** — Strategy-specific parameters — DTE, strike width, and leg structure.
3. **Results KPIs** — Total Return · Win Rate · Sharpe · Max Drawdown for the simulated window.
4. **Equity Curve + Result Tabs** — Equity Curve, Distribution, Monthly, and per-Trade views of the simulation.

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5 **Trade Statistics** — Profit Factor, average win/loss, and holding period — the texture behind the headline.

WORKFLOW · THIS PAGE AT A GLANCE

Pick Strategy → Choose Windows → Run Simulation → Study Results

PURPOSE
Simulate strategy behaviour against historical regimes for educational reflection.

WHY IT EXISTS
Rehearsing strategies in low-stakes historical windows builds structural intuition.

PREREQUISITES
A defined strategy template or a symbol + strategy pair.

WHEN TO USE
During study sessions and when evaluating a new strategy.

WHO SHOULD USE
Pro & Elite users.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Select a strategy.
2. Choose one or more historical windows.
3. Run the simulation.
4. Read the educational metrics and the equity curve.
5. Study — do not trade — based on results.

EXPECTED OUTCOME
A structured educational understanding of how a strategy would have behaved historically.

SCREEN STATES

Idle — Waiting for strategy + window selection.

Running — Simulation is executing; progress shown in a slim bar.

Complete — Results panel populated with metrics and chart.

Error — If insufficient data is available, an educational error card explains why.

TIPS
Run one strategy across three different windows — that reveals robustness.

COMMON MISTAKES
Treating backtest results as future forecasts.

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KEYBOARD SHORTCUTS

G B · Jump to Backtesting

MOBILE / TABLET NOTES

Charts remain interactive. Metrics table becomes horizontally scrollable.

TROUBLESHOOTING

Simulation stalled? Try a shorter window or fewer instruments.

RELATED PAGES

Trade Builder

Decision Support

Market Intelligence

FREQUENTLY ASKED

Q: Are these customer results? — A: No. Every result is an internal educational simulation only.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

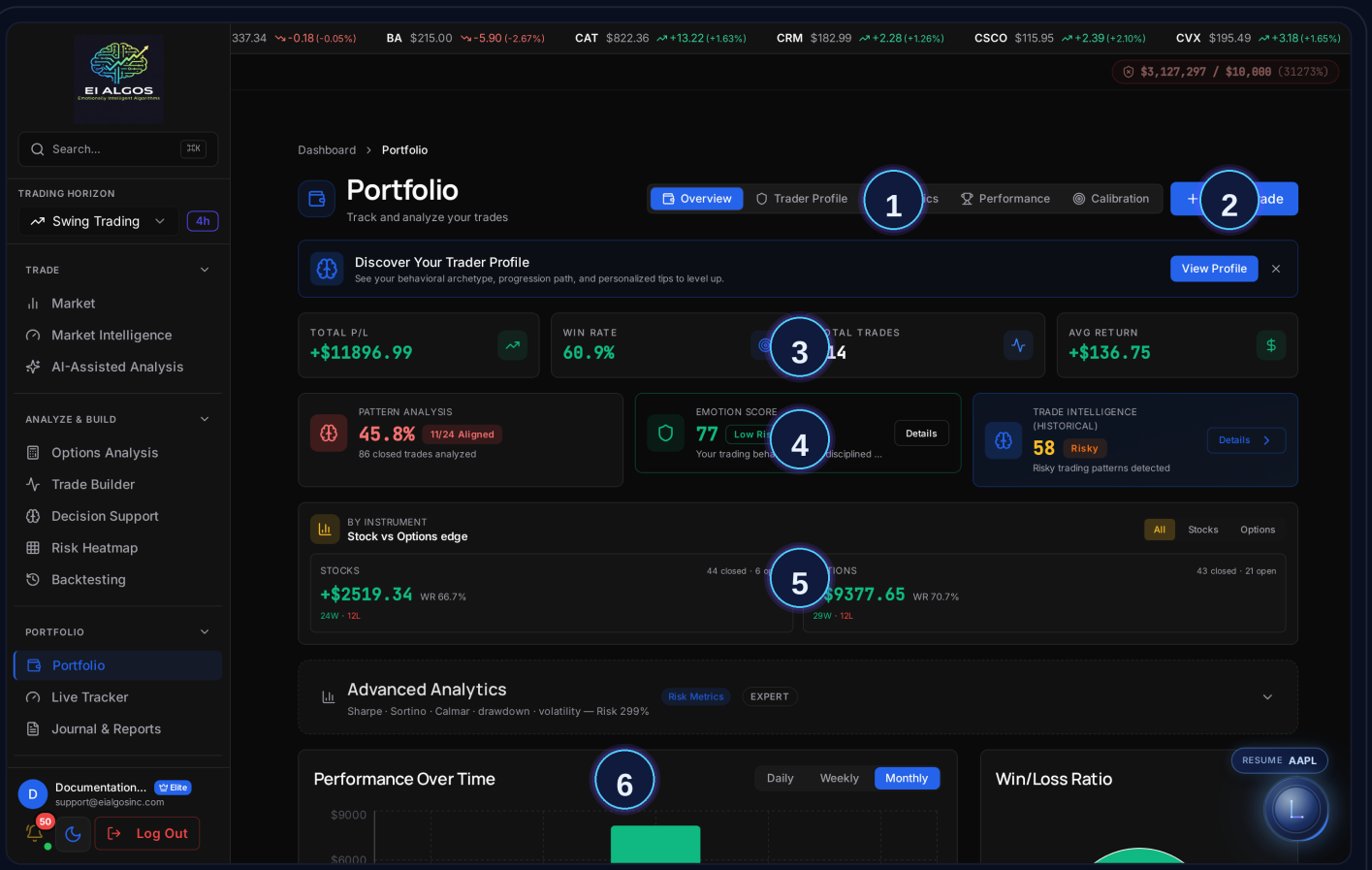
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P09 · PORTFOLIO · OVERVIEW `/portfolio`

Portfolio

Track every trade — with the reasoning attached.



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WHY THIS MATTERS

One screen answers the question every trader asks daily: where do I actually stand? Positions, patterns, and behaviour analytics live together — so performance review becomes a five-minute habit instead of a spreadsheet project.

→ Numbered Callouts

1. **View Tabs** — Overview · Trader Profile · Analytics · Performance · Calibration.
2. **New Trade** — Manually add a position directly from the Portfolio.
3. **KPI Row** — Total P/L, Win Rate, Total Trades, Average Return — lifetime performance.
4. **Behaviour Row** — Pattern Analysis alignment, Emotion Score, and historical Trade Intelligence side by side.

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5 **By Instrument** — Stocks vs Options edge — P/L, win rate, and W/L counts per instrument class.

6 **Performance Over Time** — Daily / Weekly / Monthly realised P/L chart with Win/Loss ratio.

WORKFLOW · THIS PAGE AT A GLANCE

Overview → Trader Profile → Analytics → Performance

PURPOSE
Consolidated view of every planned, active, and closed trade — and the behavioural context around them.

WHY IT EXISTS
A single, honest ledger keeps your practice grounded in reality — not in memory.

PREREQUISITES
Signed-in account.

WHEN TO USE
Daily check-in; weekly review; monthly reflection.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open Portfolio from the sidebar.
2. Review the Overview tab.
3. Switch to Trader Profile for behavioural context.
4. Open Analytics for deeper cuts.
5. Move to Live Tracker for real-time position states.

EXPECTED OUTCOME
A calm, honest picture of your entire trading practice.

SCREEN STATES

Populated — Full behavioural and P/L context.

Empty — New account — a friendly 'log your first trade' card is shown.

Broker-Synced — If a broker is connected, positions auto-refresh.

TIPS
Read the Calibration tab monthly — it shows how accurate your self-assessment has been.

COMMON MISTAKES
Measuring only P&L. Plan-adherence is the leading indicator.

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KEYBOARD SHORTCUTS

G P · Jump to Portfolio

MOBILE / TABLET NOTES

Tabs scroll horizontally. KPI cards stack in a 2×2 grid.

TROUBLESHOOTING

Missing trades? Confirm broker sync is on, or import via CSV in Settings.

Numbers off? Sync may lag broker execution by a few minutes.

RELATED PAGES

Live Tracker

Journal & Reports

Trader Intelligence

FREQUENTLY ASKED

Q: Can I import from a broker CSV? — A: Yes — Settings → Import.

Q: How is Win Rate calculated? — A: Closed trades only, unless you toggle ‘include open’.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

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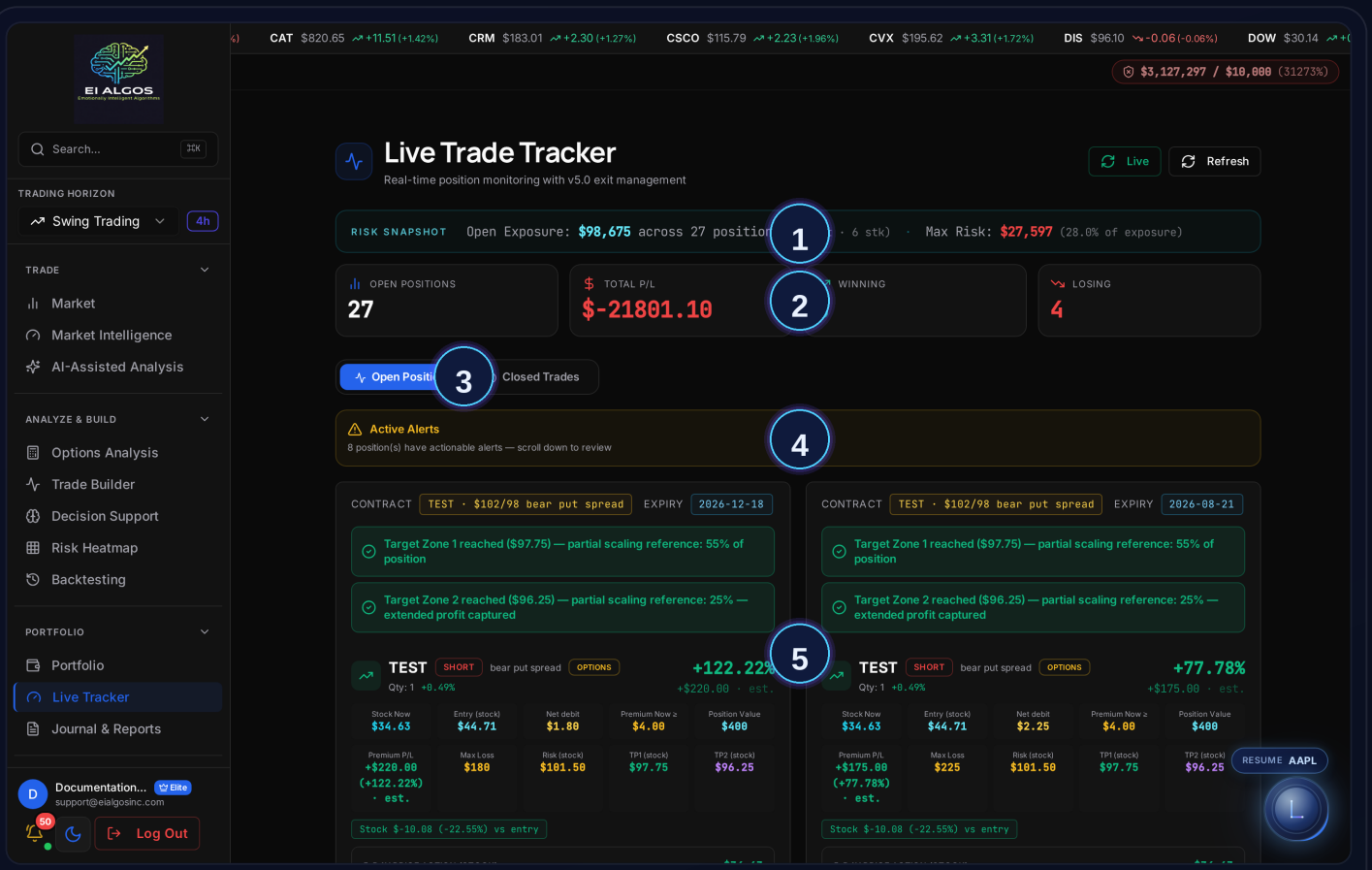
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EI ALGOS › GROUP 03 · PORTFOLIO › LIVE TRACKER

P10 · PORTFOLIO · LIVE TRACKER | /live-tracker | PRO & ELITE PLANS

Live Tracker

Your open positions — in one calm view.



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WHY THIS MATTERS

Open positions are where emotions do the most damage. Live health, defined risk levels, and breach alerts keep you managing the plan instead of watching the P/L — the discipline gap this page exists to close.

→ Numbered Callouts

1. **Risk Snapshot** — Open exposure, position count, and max risk as a % of exposure — the day's headline risk.
2. **Position KPIs** — Open Positions · Total P/L · Winning · Losing counts, updated live.
3. **Open / Closed Toggle** — Switch between live positions and your closed-trade history.
4. **Active Alerts Banner** — Positions with actionable alerts (targets reached, risk levels breached).

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5 **Position Cards** — Contract strip, live P/L, premium, max loss, risk and target levels for every position.

WORKFLOW · THIS PAGE AT A GLANCE

Confirm Positions → Attach Alerts → Journal Impulses → Step Away

PURPOSE
Monitor active positions with live prices, unrealised P/L, and stop/target proximity.

WHY IT EXISTS
A single glance keeps you calm — instead of jumping between broker tabs.

PREREQUISITES
At least one active position (planned or broker-synced).

WHEN TO USE
Any time you have open positions.

WHO SHOULD USE
Pro & Elite users.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Open Live Tracker.
2. Confirm each position matches your Trade Builder plan.
3. Attach alerts as needed.
4. Journal any adjustments as they happen.

EXPECTED OUTCOME
Composed monitoring — with journal cues at critical moments.

SCREEN STATES

Empty — No open positions — a suggestion to open Trade Builder.

Streaming — Prices update in near-real time.

Alert Fired — A gentle in-app notification with a link to the position.

TIPS
Journal impulses in real time — even one sentence.

COMMON MISTAKES
Watching every tick. Set alerts and step away.

KEYBOARD SHORTCUTS
G L · Jump to Live Tracker

MOBILE / TABLET NOTES
Position cards adapt to a stacked layout. Alerts use system push (if enabled).

TROUBLESHOOTING
Prices stale? Refresh — the socket reconnects automatically.

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RELATED PAGES

- Portfolio
- Trade Journal
- Risk Heatmap

FREQUENTLY ASKED

Q: Do alerts execute trades? — A: No. Alerts are educational — you decide.

ACCESSIBILITY

- Full keyboard navigation supported
- ARIA labels on interactive elements
- WCAG AA colour contrast throughout
- Screen reader friendly

IMPORTANT REMINDER

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P11 · PORTFOLIO · JOURNAL & REPORTS | /trade-journal | PRO & ELITE PLANS

Journal & Reports

The habit that compounds — one entry at a time.



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WHY THIS MATTERS

Traders who journal consistently improve measurably faster — but only if journaling is frictionless. Structured entries tied to real trades turn every win and loss into a data point you can actually learn from.

→ Numbered Callouts

1. **Import / Export** — Import broker trades or export full reports in one click.
2. **Journal KPIs** — Total Trades, Win Rate, Total P/L, and ML Accuracy for the last 30 days.
3. **Win/Loss Distribution** — Visual outcome split across your recorded trades.
4. **How ML Learning Works** — Record → Analyze → Weights Update → Better analytics — why recording outcomes matters.

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WORKFLOW · THIS PAGE AT A GLANCE

Pre-Trade Note → Live Adjustment → Post-Trade Review → Weekly Report

PURPOSE
Capture your reasoning, emotions, and reflections around every trade; export tidy reports.

WHY IT EXISTS
Journaling is the single highest-leverage learning habit in trading.

PREREQUISITES
Signed-in account.

WHEN TO USE
At entry, at exit, during any material adjustment.

WHO SHOULD USE
Pro & Elite users.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Open Journal & Reports.
2. Add a pre-trade entry when planning.
3. Add a during-trade entry for any adjustment.
4. Add a post-trade reflection when the trade closes.
5. Run monthly reports for review or coaching.

EXPECTED OUTCOME
A private, searchable memory of your entire trading practice.

SCREEN STATES

Empty — New account — a friendly 'first entry' prompt is shown.

Draft — Auto-saves as you type.

Saved — Entry is timestamped and immutable — a proper journal.

TIPS
Set a daily 5pm reminder to write a two-sentence reflection.

COMMON MISTAKES
Only journaling losers. Winners contain equal data.

KEYBOARD SHORTCUTS

G J · Jump to Journal

N · New entry

MOBILE / TABLET NOTES
Entry composer supports dictation. Attachments accept camera roll or voice memos.

TROUBLESHOOTING

Cannot attach? Check that browser permissions include file access.

Report empty? Verify the date range spans closed trades.

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RELATED PAGES

Portfolio

Trade History

Reports

FREQUENTLY ASKED

Q: Is my journal private? — A: Yes. It is private by default. It is never shared.

Q: Can I export? — A: Yes — as PDF or CSV.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

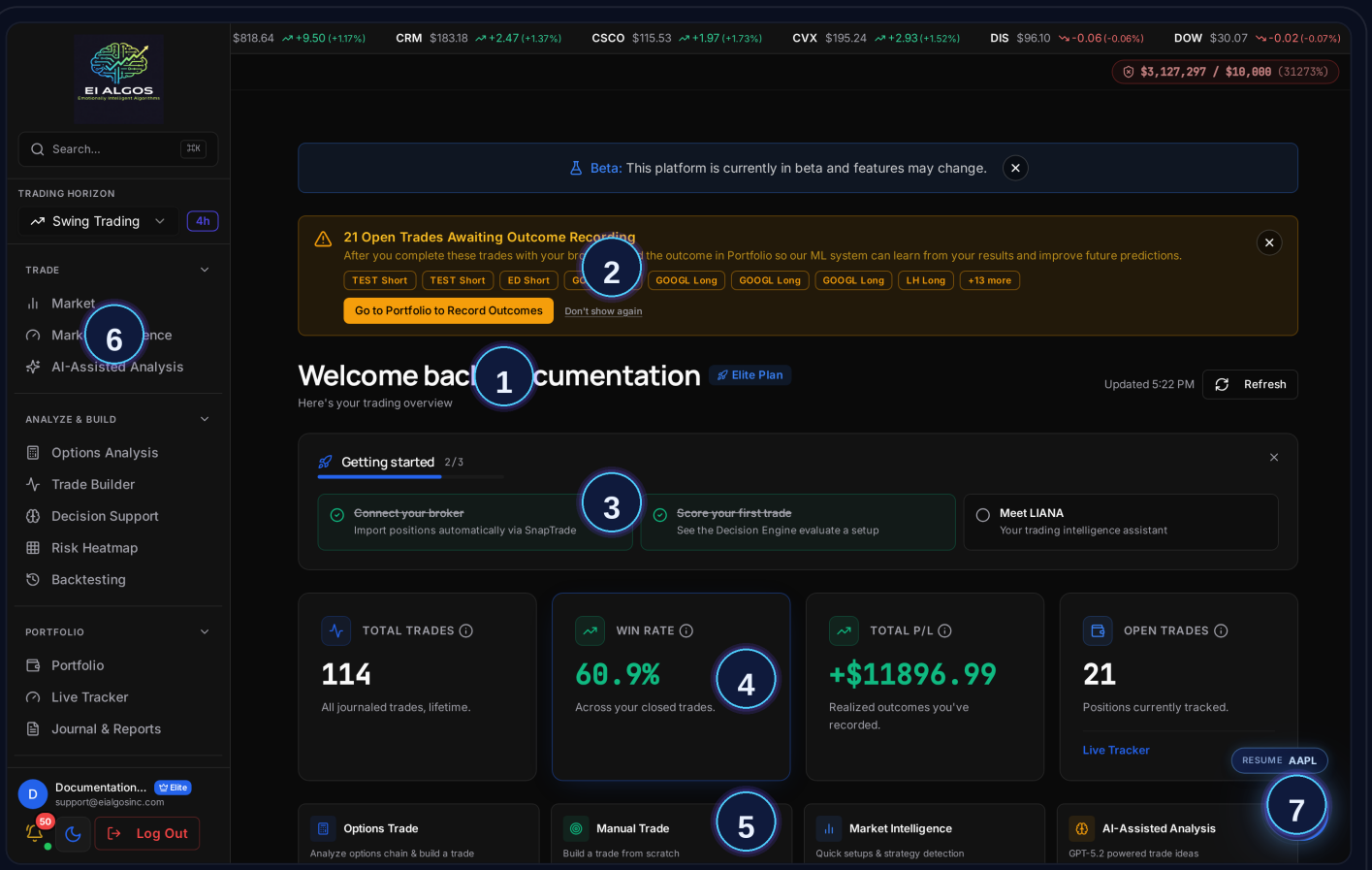
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P12 · TRADER INTELLIGENCE · DASHBOARD /dashboard

Dashboard

Everything important — one calm screen.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

Your entire trading practice — performance, behaviour, and next actions — condensed into one morning glance. It replaces the scattered 'check five apps' routine with a single, calm starting point.

→ Numbered Callouts

1 **Welcome Header + Plan Pill** — Confirms who is signed in and which plan is active. Your trading overview starts here every morning.

2 **Outcome Recording Reminder** — Lists open trades awaiting outcome recording — the platform learns from every recorded result.

3 **Getting Started Checklist** — Three-step onboarding tracker: connect broker, score a trade, meet LIANA.

4 **KPI Cards** — Total Trades · Win Rate · Total P/L · Open Trades — your lifetime numbers at a glance.

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5 **Quick Action Cards** — One-click entry points into Options Trade, Manual Trade, Market Intelligence, and AI-Assisted Analysis.

6 **Left Sidebar** — The five navigation groups — always visible, your permanent map of the platform.

7 **LIANA Beacon** — The persistent orb bottom-right. Click on any page to open the AI trading assistant.

WORKFLOW · THIS PAGE AT A GLANCE

Read Welcome → Scan KPIs → Open Quick Action → Meet LIANA

PURPOSE
A behavioural-first home screen — showing your TIS, emotion, KPIs, and next actions.

WHY IT EXISTS
A well-organised dashboard reduces cognitive load and speeds calm decisions.

PREREQUISITES
Signed-in account.

WHEN TO USE
Every session begins here.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1 Open Dashboard (or press G D).

2 Read the Welcome + Getting Started row.

3 Scan the four KPI cards.

4 Open any Quick Action to jump into a workflow.

EXPECTED OUTCOME
You start every session with orientation — not overwhelm.

SCREEN STATES

New Account — The Getting Started checklist takes centre stage.

Established — Getting Started collapses; KPIs and AI cards lead.

Broker-Connected — Open positions and live P/L appear in the KPI cards.

TIPS
Pin the two KPI panels you check most. Hide the rest.

COMMON MISTAKES
Enabling every widget. Signal beats coverage.

KEYBOARD SHORTCUTS
G D · Jump to Dashboard

MOBILE / TABLET NOTES
KPI cards stack in a 2×2 grid. Widgets collapse into an accordion.

TROUBLESHOOTING
Dashboard slow to load? Refresh — the initial load fetches multiple summaries.

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RELATED PAGES

Portfolio

Intelligence Dashboard

Trader Intelligence Score

FREQUENTLY ASKED

Q: Can I customise it? — A: Yes — pin/unpin widgets from any card's kebab menu.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

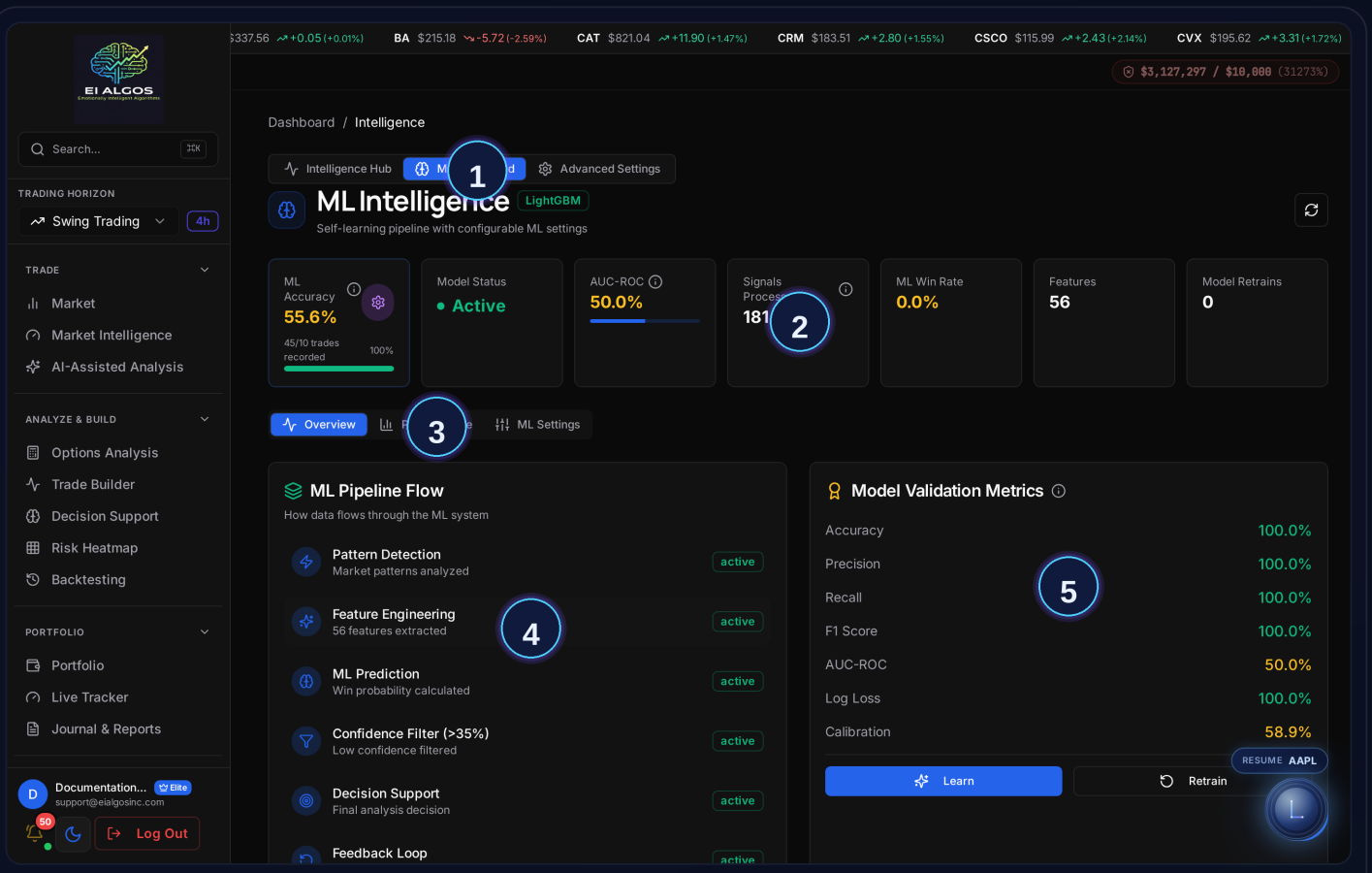
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P13 · TRADER INTELLIGENCE · INTELLIGENCE DASHBOARD | /intelligence | PRO & ELITE PLANS

Intelligence Dashboard

A behavioural x-ray of your trading practice.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

You cannot fix a behaviour you cannot see. Plan adherence, sizing consistency, and decision quality are graphed over time — making your discipline as measurable as your returns.

→ Numbered Callouts

1. **Intelligence Hub Tabs** — Intelligence Hub · ML Dashboard · Advanced Settings.
2. **ML KPI Strip** — Model accuracy, status, AUC-ROC, signals processed, win rate, features, retrains.
3. **Section Tabs** — Overview · Performance · ML Settings.
4. **ML Pipeline Flow** — How your data flows: pattern detection → features → prediction → filter → decision support.

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5 **Model Validation Metrics** — Accuracy, precision, recall, F1, AUC-ROC, calibration — full model transparency.

WORKFLOW · THIS PAGE AT A GLANCE

Behaviour Timeline → Plan Adherence → Sizing Consistency → Decision Quality

PURPOSE
Deep behavioural analytics — trends in your discipline, awareness, and decision quality.

WHY IT EXISTS
Behaviour is the leading indicator of performance.

PREREQUISITES
Journal entries + closed trades.

WHEN TO USE
Weekly and monthly reviews.

WHO SHOULD USE
Pro & Elite users.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Open Intelligence Dashboard.
2. Read the four trend panels.
3. Note anything trending in the wrong direction.
4. Journal any observations you want to remember.

EXPECTED OUTCOME
A calm, honest read on how your practice is actually evolving.

SCREEN STATES

Insufficient Data — New accounts see a '30 closed trades unlocks Intelligence' card.

Populated — Trends over the selected range.

TIPS
Read this on Sunday evenings — pattern week begins Monday.

COMMON MISTAKES
Reacting to one data point. Read the trend.

KEYBOARD SHORTCUTS
G N · Jump to Intelligence Dashboard

MOBILE / TABLET NOTES
Trend panels remain interactive; long-press a point to see the underlying journal entries.

TROUBLESHOOTING
Panel greyed out? You need more closed trades for a trend.

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RELATED PAGES

- Emotion Score
- Trader Intelligence Score
- Journal & Reports

FREQUENTLY ASKED

Q: Is behaviour data private? — A: Yes — it never leaves your account.

ACCESSIBILITY

- Full keyboard navigation supported
- ARIA labels on interactive elements
- WCAG AA colour contrast throughout
- Screen reader friendly

IMPORTANT REMINDER

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P13B · TRADER INTELLIGENCE · BEHAVIORAL SCORES

Behavioral Scores · Master Overview

Three behavioural lenses — one system. Each score answers a different question over a different time horizon.

WHY THIS MATTERS

Traders who know WHICH score to check WHEN stop confusing a bad mood with a bad career. The 7-day Emotion Score guards today's session, the long-term TIS tracks your growth, and the Trader Profile turns self-improvement into a concrete, levelled path.

Emotion Score

SHORT-TERM · ROLLING 7 DAYS

"How am I doing right now?"

WHAT IT MEASURES

A 0–100 educational read of your current emotional state — stress level, decision quality, risk awareness, and emotional control — computed over your last 7 days of activity.

HOW TO USE IT

Check before every session and before every entry. If elevated, reduce size, paper-trade, or step away. It resets quickly — one calm, disciplined week can restore it.

FULL CHAPTER → P14 · EMOTION SCORE

Trader Intelligence Score (TIS)

LONG-TERM · WEEKS TO MONTHS

"Am I becoming a better trader?"

WHAT IT MEASURES

A slow-moving 0–100 composite of decision discipline — plan adherence, sizing consistency, emotional awareness, and journaling habit — built from your full history of closed, journaled trades.

HOW TO USE IT

Check weekly and monthly. Do not chase it daily — it is designed to filter out mood and luck and show the skill signal that actually compounds.

FULL CHAPTER → P15 · TRADER INTELLIGENCE SCORE

Trader Profile

EVOLVING · RE-EVALUATED EVERY CLOSED TRADE

"What kind of trader am I — and what should I become?"

WHAT IT MEASURES

A behavioural classification into one of seven archetypes — Gambler, Emotional, Fear-Driven, Overconfident, Contrarian, Analytical, Disciplined — based on your actual closed-trade behaviour, not self-reporting.

HOW TO USE IT

Check monthly and after every ~20 closed trades. Follow the gamified progression steps to level up toward the Disciplined archetype — the platform adapts its guidance to your current level.

FULL CHAPTER → P15B · TRADER PROFILE

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When To Check Which Score

THE MOMENT	CHECK THIS SCORE	WHY
Before a session	Emotion Score	Elevated state? Adjust today's plan before the market tests it.
Before an entry	Emotion Score	A 10-second state check beats a 10-day drawdown.
Weekly review	TIS	Pick the weakest component and focus on it for one week.
Monthly review	TIS + Trader Profile	Is the long-term trend up? Has your archetype improved?
Every ~20 closed trades	Trader Profile	Classification confidence sharpens — review your progression steps.

IMPORTANT REMINDER

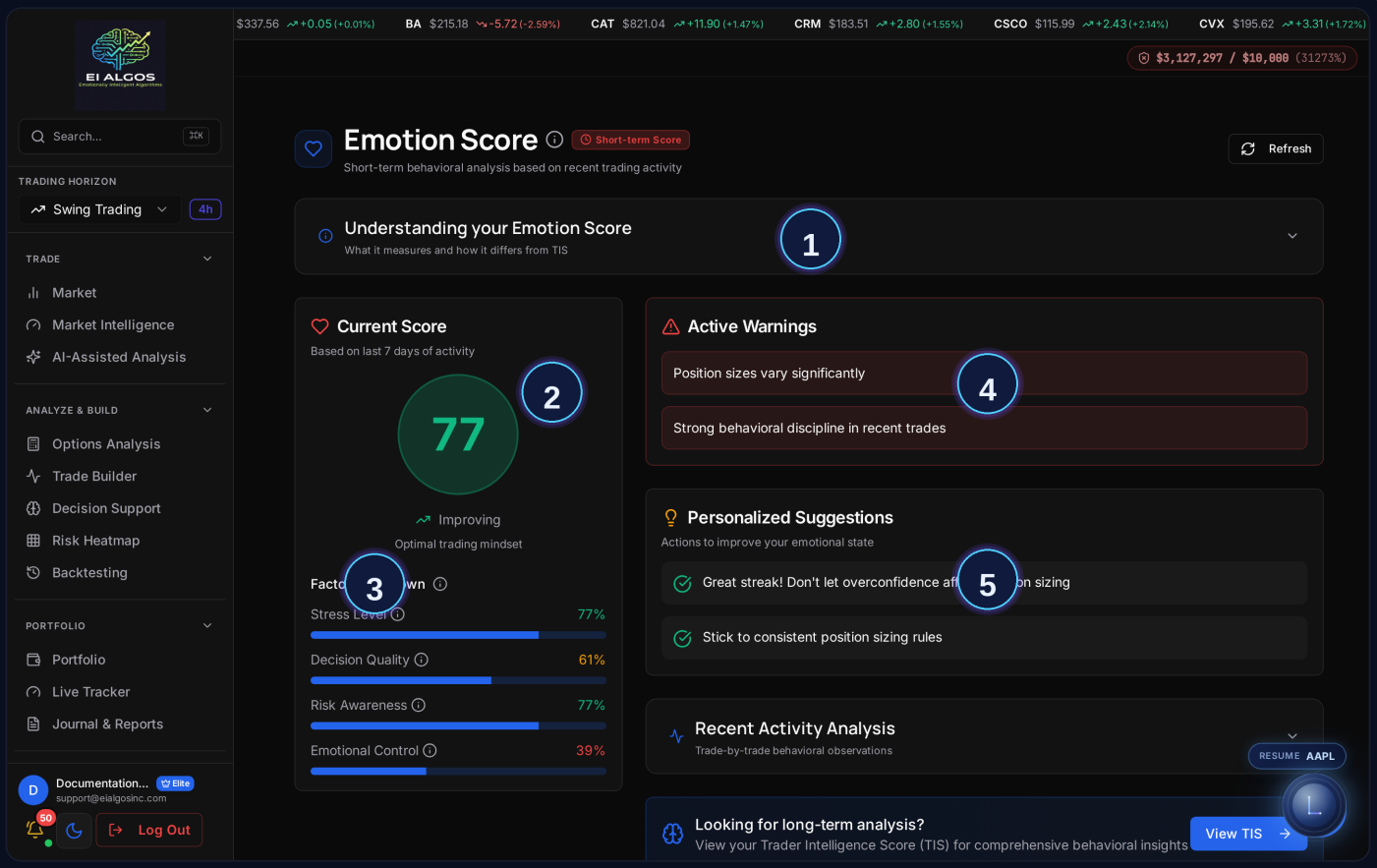
All behavioural scores are educational measurements of your own decision process. They do not predict returns, do not rate or recommend securities, and are never investment advice. EI ALGOS provides educational and analytical tools only — you remain solely responsible for every investment decision.

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P14 · TRADER INTELLIGENCE · EMOTION SCORE · SHORT-TERM (7-DAY) /emotion-score

Emotion Score

A mirror — for the moment before you click. Your short-term behavioural score, computed over a rolling 7-day window.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

Emotional state is the invisible variable behind most rule-breaking. Quantifying it into a score gives you an early-warning signal — so you can reduce size or step away before a tilted session becomes an expensive one.

→ Numbered Callouts

1. **Understanding Banner** — What the Emotion Score measures and how it differs from the TIS.
2. **Current Score Ring** — Your 7-day behavioural score with trend direction and mindset label.
3. **Factor Breakdown** — Stress Level · Decision Quality · Risk Awareness · Emotional Control.
4. **Active Warnings** — Behavioural flags detected in recent activity — e.g. position-size variance.

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5 **Personalised Suggestions** — Concrete actions to improve your emotional state before the next session.

WORKFLOW · THIS PAGE AT A GLANCE

Read Composite → Review Drivers → Cross-Ref Journal → Adjust Session Plan

PURPOSE

Surface your current emotional state through a calm educational lens. The Emotion Score is deliberately short-term — it reflects your last 7 days of activity and resets quickly as your behaviour changes.

WHY IT EXISTS

State matters as much as setup. This score tells you about NOW — while the long-term Trader Intelligence Score tracks your development over weeks and months.

PREREQUISITES

Signed-in account.

WHEN TO USE

Every session; every entry.

WHO SHOULD USE

All users.

PLAN TIER

Included in all plans

→ Workflow · Step-by-Step

1. Open Emotion Score.
2. Read the composite score.
3. Review the drivers.
4. Adjust your plan for the session if the score is elevated.

EXPECTED OUTCOME

Awareness — the single most under-appreciated edge.

SCREEN STATES

Calm — Composite in low-neutral band.

Moderate — One or two drivers active — an educational reminder is shown.

Elevated — Multiple drivers active — the practice suggestion is highlighted.

TIPS

If elevated, consider paper-trading the next setup.

COMMON MISTAKES

Ignoring the score because you ‘feel fine’. Ask anyway.

KEYBOARD SHORTCUTS

G E · Jump to Emotion Score

MOBILE / TABLET NOTES

Score card is oversized on mobile — one-tap glance.

TROUBLESHOOTING

Score not updating? Journal an entry — the model uses your reflections as inputs.

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RELATED PAGES

- Behavioural Intelligence
- Trader Intelligence Score
- Journal & Reports

FREQUENTLY ASKED

Q: Is my state shared? — A: No — Emotion Score is fully private.

ACCESSIBILITY

- Full keyboard navigation supported
- ARIA labels on interactive elements
- WCAG AA colour contrast throughout
- Screen reader friendly

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EI ALGOS › GROUP 04 · TRADER INTELLIGENCE › TRADER INTELLIGENCE SCORE

P15 · TRADER INTELLIGENCE · TIS · LONG-TERM | /trader-intelligence | PRO & ELITE PLANS

Trader Intelligence Score

A long-run score of your decision discipline — your long-term behavioural score, built from months of closed and journaled trades.



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WHY THIS MATTERS

The TIS gives your development as a trader a single trackable number. Instead of judging yourself by last week's P/L — which is mostly noise — you track the skill signal that actually compounds.

→ Numbered Callouts

1. **TIS Ring** — Your long-term behavioural score out of 100 with a plain-language read.
2. **Long-Term Badge** — Distinguishes the TIS (long-term) from the 7-day Emotion Score.
3. **Component Breakdown** — Radar across Risk Mgmt · Discipline · Behavior · Decisions · Consistency.
4. **Score History** — 30-day trend — is your discipline compounding or eroding?

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WORKFLOW · THIS PAGE AT A GLANCE

Check TIS → Read Components → Study Progression → Pick 1 Focus

PURPOSE
A composite educational score of how consistently you follow your own plan over the long term. Unlike the 7-day Emotion Score, the TIS moves slowly by design — over weeks and months, not days.

WHY IT EXISTS
What gets measured, matures. The TIS is deliberately long-term — it filters out mood and luck to reflect skill development, while the Emotion Score covers the short-term (7-day) picture.

PREREQUISITES
At least 15 closed and journaled trades.

WHEN TO USE
Weekly and monthly review sessions.

WHO SHOULD USE
Pro & Elite users.

PLAN TIER
Pro & Elite plans

→ Workflow · Step-by-Step

1. Open Trader Intelligence Score.
2. Note the current score and current level.
3. Read the component breakdown.
4. Focus on the lowest component for the coming week.

EXPECTED OUTCOME
A slow-moving, honest measure of your decision-making maturity.

SCREEN STATES

Insufficient Data — '15 journaled trades unlocks TIS' prompt.

Active — Full component + progression view.

TIPS
Do not chase TIS. Improve one component per week — TIS follows.

COMMON MISTAKES
Comparing your TIS to another trader's. It is personal, not competitive.

KEYBOARD SHORTCUTS
G S · Jump to TIS

MOBILE / TABLET NOTES
Component breakdown becomes a vertical bar chart. Progression curve is swipe-able.

TROUBLESHOOTING
Score frozen? Confirm you have journaled the recent closed trades.

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RELATED PAGES

Intelligence Dashboard

Emotion Score

Journal & Reports

FREQUENTLY ASKED

Q: Does TIS predict returns? — A: No — it measures decision discipline. Returns are a separate story.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

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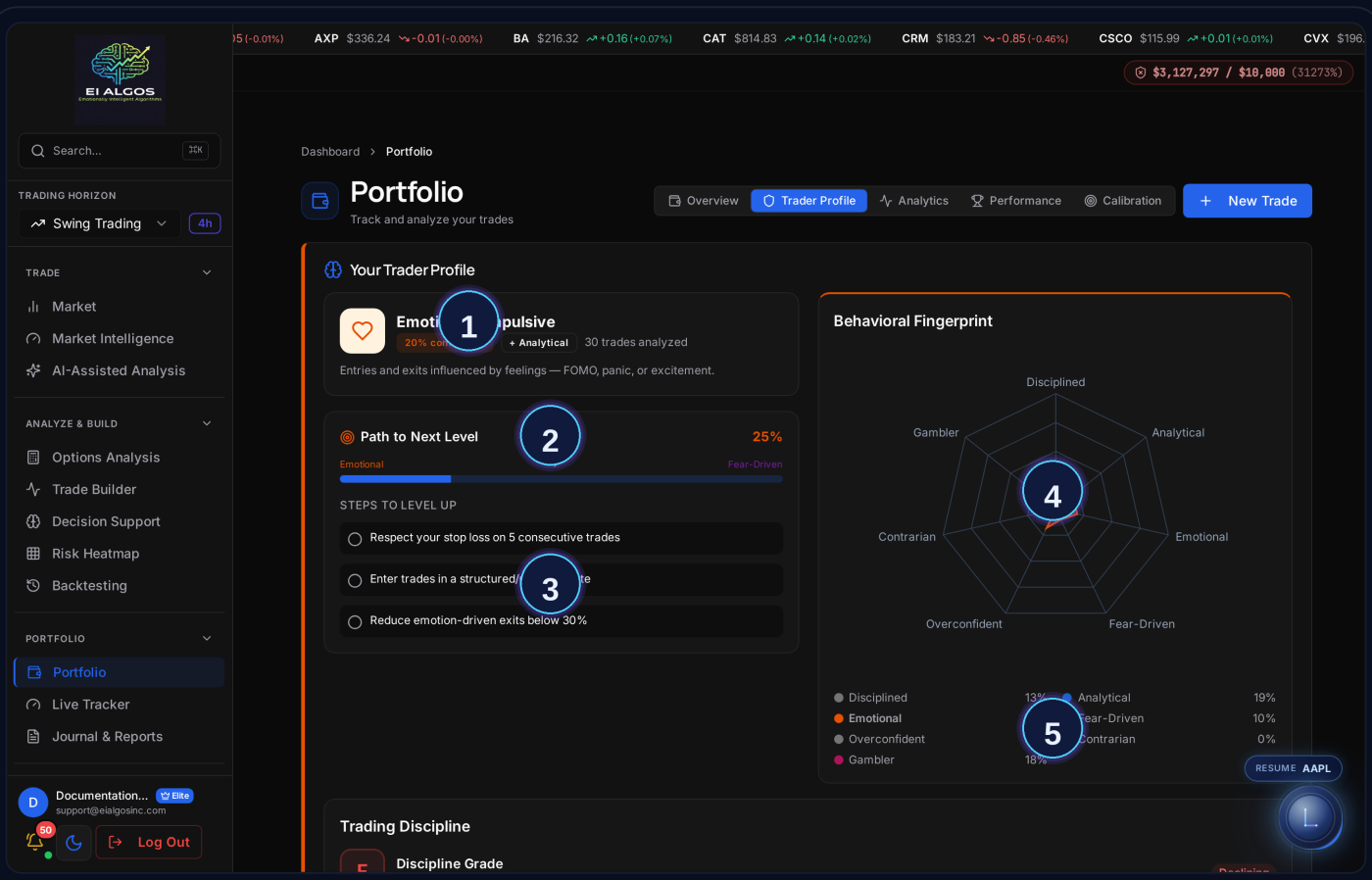
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P15B · TRADER INTELLIGENCE · TRADER PROFILE · EVOLVING CLASSIFICATION

/portfolio

Trader Profile

Seven archetypes. One goal: become the Disciplined trader. Your profile is classified from real behaviour — and gamified so you always know your next level.



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WHY THIS MATTERS

Most traders never find out what their behaviour actually looks like from the outside. The profile shows you — from real closed trades — and then gamifies the climb, so becoming a Disciplined trader is a sequence of measurable steps instead of a vague ambition.

→ Numbered Callouts

1 **Current Archetype** — Your primary classification — one of 7 archetypes — with classification confidence and trades analyzed.

2 **Path to Next Level** — The gamified ladder in action — Emotional → Fear-Driven here — with live progress toward the next level.

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3 **Steps to Level Up** — Concrete, measurable actions — respect stops, structured entries, fewer emotion-driven exits.

4 **Behavioral Fingerprint** — Radar across all seven archetypes — which traits dominate your recent closed trades.

5 **Archetype Mix** — Your weighted percentages across the seven archetypes, recomputed as trades close.

WORKFLOW · THIS PAGE AT A GLANCE

Open Profile Tab → Read Archetype → Review Steps → Level Up

PURPOSE
Classify your trading behaviour into one of seven archetypes — from actual closed-trade data, not self-reporting — and show the exact, gamified steps to progress to the next level.

WHY IT EXISTS
Self-image lies; closed trades do not. Classifying real behaviour lets the platform personalise guidance, sizing prompts, and coaching tone to who you actually are today.

PREREQUISITES
Closed trades in your Portfolio (imported via broker or recorded manually), with outcomes recorded.

WHEN TO USE
Monthly, and after every batch of ~20 closed trades — the classification re-evaluates continuously with every closed trade.

WHO SHOULD USE
All users. A first read appears after ~5 closed trades; the archetype fully unlocks around 20.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open Portfolio → Trader Profile tab.
2. Read your current archetype and its classification confidence.
3. Review the radar — which behavioural traits dominate your recent trades.
4. Open the progression panel — see your next level and the concrete steps to reach it.
5. Pick one step and focus on it for your next batch of trades.
6. Close trades and record outcomes — the profile re-evaluates with every closed trade.

EXPECTED OUTCOME
You know exactly what kind of trader your behaviour says you are — and the specific habits that move you up a level.

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SCREEN STATES

Unclassified — Fewer than ~5 closed trades — a demo profile explains what will unlock.

Classifying — 5–20 closed trades — a primary archetype is shown with growing confidence.

Classified — 20+ closed trades — full archetype, secondary trait, radar, and gamified progression path.

TIPS

Treat the ladder like a training programme, not a judgement — every archetype has a mapped path to Disciplined.

Watch the secondary archetype too — it often explains your behaviour under stress.

COMMON MISTAKES

Trying to 'game' the classification. It reads behaviour, not intentions — the only way up is genuinely better habits.

Ignoring low confidence on early reads. Fewer than 20 trades means the profile is still sharpening.

KEYBOARD SHORTCUTS

G P · Jump to Portfolio

MOBILE / TABLET NOTES

The profile card stacks vertically: archetype → radar → progression. All steps remain tappable.

TROUBLESHOOTING

Stuck on Unclassified? Record outcomes for your closed trades — classification needs completed, scored trades.

Archetype feels wrong? Check the sample size — early classifications carry lower confidence and sharpen with data.

RELATED PAGES

Behavioral Scores · Master Overview

Trader Intelligence Score

Emotion Score

Portfolio

FREQUENTLY ASKED

Q: How long does classification take? — A: A first read after ~5 closed trades; a confident read after ~20. It then re-evaluates continuously.

Q: Can my archetype change? — A: Yes — that is the point. The gamified steps exist to move you deliberately toward Disciplined.

Q: Is my profile shared or compared to others? — A: No. It is private to your account and never competitive.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

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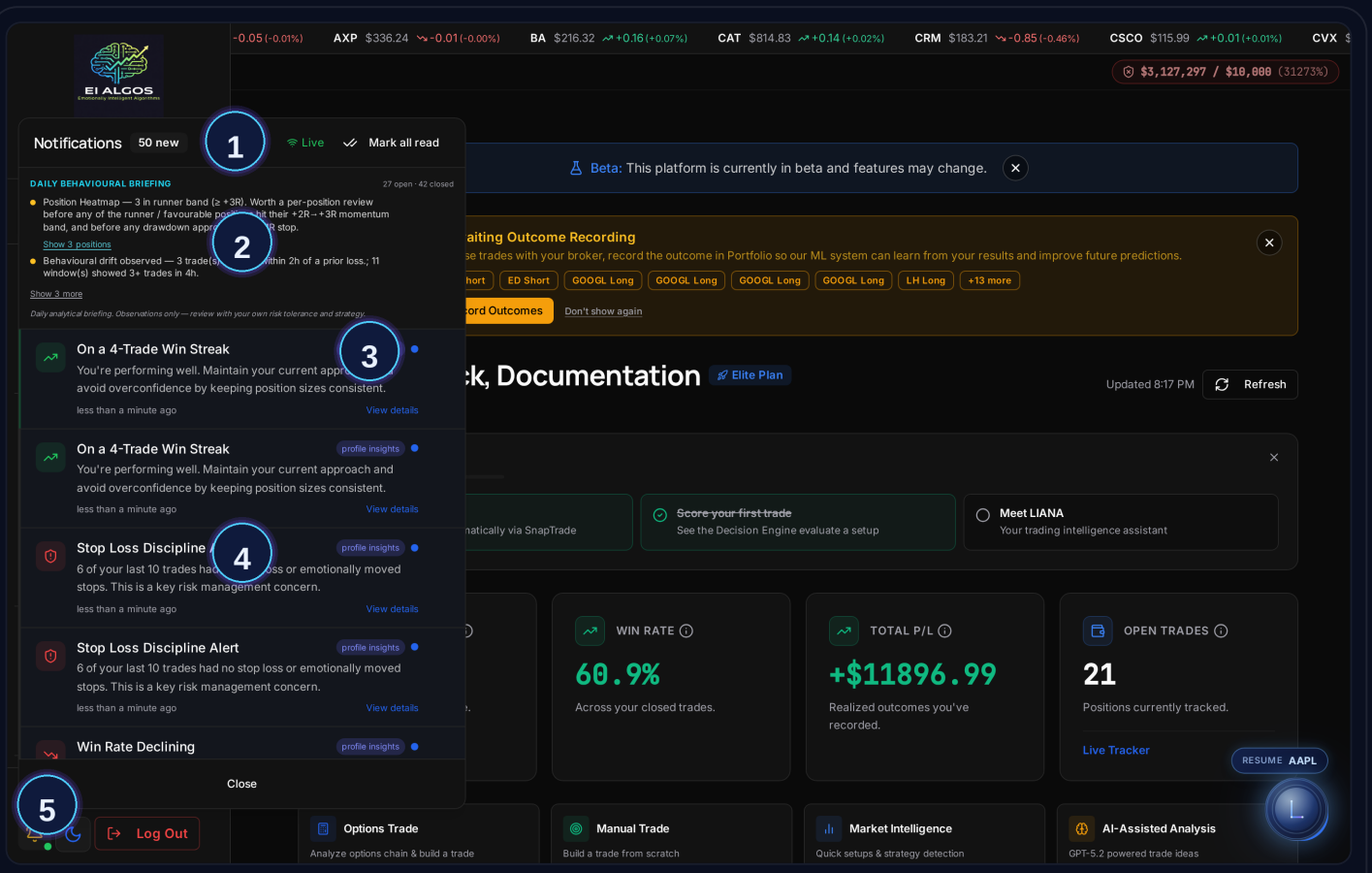
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P15C · TRADER INTELLIGENCE · NOTIFICATIONS

/dashboard

Notifications & Alerts

The platform talks back — timely, behavioural, and always educational.



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WHY THIS MATTERS

The costliest trading mistakes happen in the gap between something changing and you noticing. Notifications close that gap — risk breaches, score drops, and behavioural patterns reach you the moment they matter, each one an educational nudge toward a better decision.

→ Numbered Callouts

1. **Panel Header** — Unread count, live status, and one-click Mark All Read.
2. **Daily Behavioural Briefing** — Position heatmap, behavioural drift, and risk observations — refreshed every session.
3. **Profile-Insight Alerts** — Personalised behavioural nudges — win streaks, overconfidence guards, discipline flags.
4. **Discipline & Risk Alerts** — Stop-loss discipline, win-rate shifts, and risk-management concerns as they emerge.

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5 **Notification Bell** — The always-visible bell with unread badge — the single entry point for every alert.

WORKFLOW · THIS PAGE AT A GLANCE

Open Bell → Scan Briefing → Review Alerts → Act / Ask LIANA

PURPOSE

Deliver timely, personalised alerts — portfolio risk, score changes, behavioural nudges, market context, and system updates — so you can improve your overall trading game without watching every screen.

WHY IT EXISTS

Insight that arrives late is trivia. Notifications close the loop between what the platform sees (risk, behaviour, market shifts) and what you do next.

PREREQUISITES

Signed-in account. Portfolio, journal, and score data progressively enrich the alerts.

WHEN TO USE

Continuously — the bell aggregates everything. Scan it at session start and after every close.

WHO SHOULD USE

All users. Channels, categories, and quiet hours are configurable in Settings → Notifications.

PLAN TIER

Included in all plans

→ Workflow · Step-by-Step

1. Click the bell icon in the top bar — the badge shows your unread count.
2. Scan the Daily Briefing strip for today's market posture.
3. Review alerts by category — Portfolio, TIS, Emotion Score, Risk, Market Intelligence, and more.
4. Tap any alert to jump to the relevant page, or hand it to LIANA for a plain-language explanation.
5. Tune categories, channels, and quiet hours in Settings → Notifications.

EXPECTED OUTCOME

You never miss the moment that matters — a risk breach, a score change, or a behavioural pattern worth acting on.

SCREEN STATES

All Clear — No unread alerts — the badge is hidden.

Unread — Badge shows the count; newest alerts appear on top.

Action Suggested — Behavioural alerts (e.g. Emotion Score elevated) include a suggested educational next step.

TIPS

Treat TIS and Emotion alerts as coaching, not criticism — they fire when acting early is cheapest.

Use quiet hours so market-noise alerts never reach you outside your trading window.

COMMON MISTAKES

Muting the behavioural categories — they are the ones most correlated with expensive mistakes.

Letting unread alerts pile up. A 60-second scan at session start keeps the signal fresh.

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KEYBOARD SHORTCUTS

Esc · Close the notification panel

MOBILE / TABLET NOTES

The bell lives in the mobile top bar; the panel opens as a full-height sheet with the same categories and briefing strip.

TROUBLESHOOTING

No alerts yet? New accounts start quiet — alerts build as portfolio, journal, and score data accumulate.

Too many alerts? Trim categories in Settings → Notifications rather than muting everything.

RELATED PAGES

Dashboard

Behavioral Scores · Master Overview

Live Tracker

Settings

FREQUENTLY ASKED

Q: Which categories exist? — A: System, Market, Portfolio, TIS, Emotion Score, Risk Heatmap, ML Features, Strategy Detector, Market Intelligence, Quick Signals, Backtester, and Governance.

Q: Are alerts investment advice? — A: No. Every alert is educational context — the decision is always yours.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

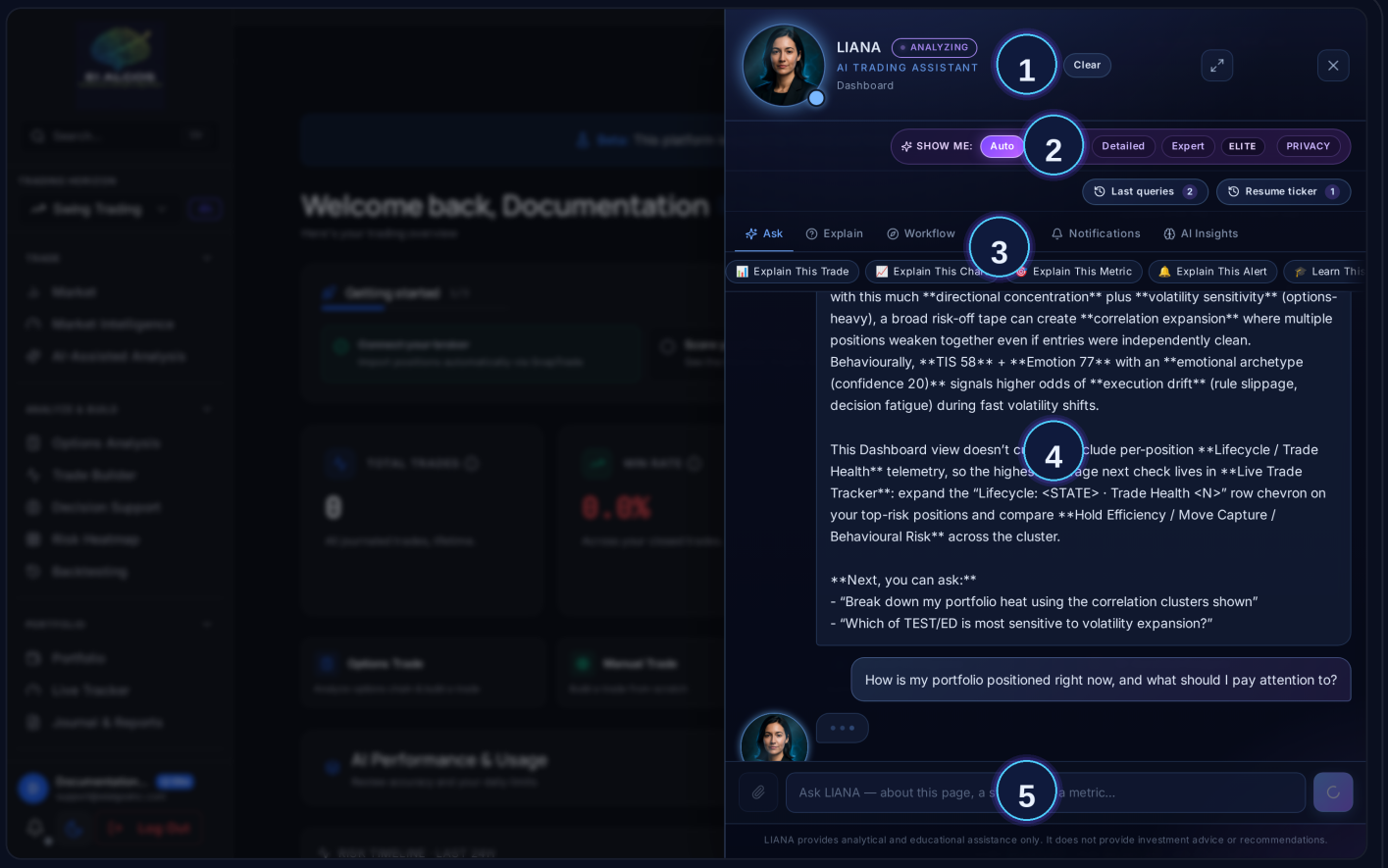
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P21 · ACCOUNT & SUPPORT · LIANA /dashboard

LIANA · AI Trading Assistant

A calm, context-aware second voice — always available, never overbearing.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

Every trader eventually faces a question mid-session with no one to ask. LIANA is a patient, context-aware second voice that knows your portfolio and your patterns — teaching in the moment, without ever pushing you toward a trade.

→ Numbered Callouts

1. **Header + Status** — LIANA's live status (Ready / Analyzing) and the page context she is aware of.
2. **Depth Selector** — SHOW ME: Auto · Simple · Detailed · Expert · Elite — set the analytical depth.
3. **Conversation Tabs + Quick Actions** — Ask, Explain, Workflow, Learn — plus one-tap chips like 'Explain This Trade'.
4. **Context-Aware Reply** — Answers reference your actual TIS, Emotion Score, and positions — model-tagged and audit-logged.

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5 **Ask Composer** — Ask about this page, a strategy, or a metric — attachments supported.

→ LIANA In Conversation · Real Examples

BEHAVIOUR COACHING

YOU

My Decision Score dropped to 62 this week. What changed?

LIANA

Two things stand out in your last five sessions. First, your position sizing varied more than usual — your Tuesday entries were roughly 2.4× your recent average size. Second, your journal shows two entries tagged as unplanned. Historically, your score recovers fastest when you return to your written sizing rule for a full week. Would you like me to break down the score components? `openai/gpt-5.2 · audit-logged`

DECISION SUPPORT · TRADE AWARENESS

YOU

Explain the risk on my AAPL bull put spread in plain language.

LIANA

Your AAPL $220/$225 bull put spread collected a $1.50 credit. Your maximum loss is the strike width minus that credit — $3.50 per share, or $350 per contract — and it occurs if AAPL closes below $220 at expiration. Your breakeven is $223.50. Right now the position sits in its profit zone. This is an educational read of the structure, not a recommendation to hold or close.

`openai/gpt-5.2 · audit-logged`

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GUARDRAILS · BY DESIGN

YOU

Should I buy TSLA calls tomorrow?

LIANA

I can't tell you what to buy — that's a boundary I keep by design. What I can do: walk you through how a TSLA call would be structured, what the current volatility regime implies for premium pricing, and how the position would fit your existing portfolio concentration. Which of those would be most useful?

`openai/gpt-5.2 · audit-logged`

→ What LIANA Knows About Your Context

Page Aware	Portfolio Aware	Trade Aware	Behaviour Coach	Decision Support
Knows which screen you are on and what it displays	Reads your live positions and exposure	Understands each position's structure and risk	References your journal and behavioural patterns	Explains — never recommends or executes

PURPOSE

Provide a patient, educational assistant that explains scores, workflows, and behaviour in plain language.

WHY IT EXISTS

Traders need an interpreter — not an oracle. LIANA teaches, contextualises, and coaches. She does not predict, recommend, or execute.

PREREQUISITES

Signed-in account.

WHEN TO USE

Any time a score, chart, term, or workflow is unclear.

WHO SHOULD USE

Every user.

PLAN TIER

Included in all plans

→ Workflow · Step-by-Step

1. Open LIANA (click the orb or press 'l').
2. Ask a natural-language question about anything visible on the current page.
3. Read the reply and check the model tag.
4. Adjust depth if the reply is too shallow or too dense.
5. Follow up — LIANA remembers the conversation context.

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EXPECTED OUTCOME

A patient, structured teacher on every page — one that grows in depth as you do.

SCREEN STATES

Idle — Waiting for a prompt. Suggests calm follow-ups based on the current page.

Generating — Model tag appears; content streams in.

Complete — Reply finalised with audit tag.

Guarded — If you ask 'what should I buy?', LIANA will decline — by design — and offer educational reframing instead.

TIPS

Ask for the bear case before the bull case — trains discipline.

Ask LIANA to explain any score in your own trading vocabulary.

COMMON MISTAKES

Asking 'should I buy this?' — LIANA will not answer, by design.

Ignoring the model tag. Transparency is part of the trust.

KEYBOARD SHORTCUTS

L · Open LIANA

Esc · Close LIANA

MOBILE / TABLET NOTES

LIANA slides up as a bottom sheet on mobile. Voice-input supported where the OS provides it.

TROUBLESHOOTING

Long wait? Check your account's Universal-Key balance in Settings → Subscription.

RELATED PAGES

The 5 Differentiators

Decision Support

Emotion Score

Trade Journal

FREQUENTLY ASKED

Q: Which model is used? — A: The active model is shown in every reply's tag.

Q: Is LIANA private? — A: Yes. Conversations are audit-logged for your account only.

Q: Does LIANA give investment advice? — A: No. Never. Education-only.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

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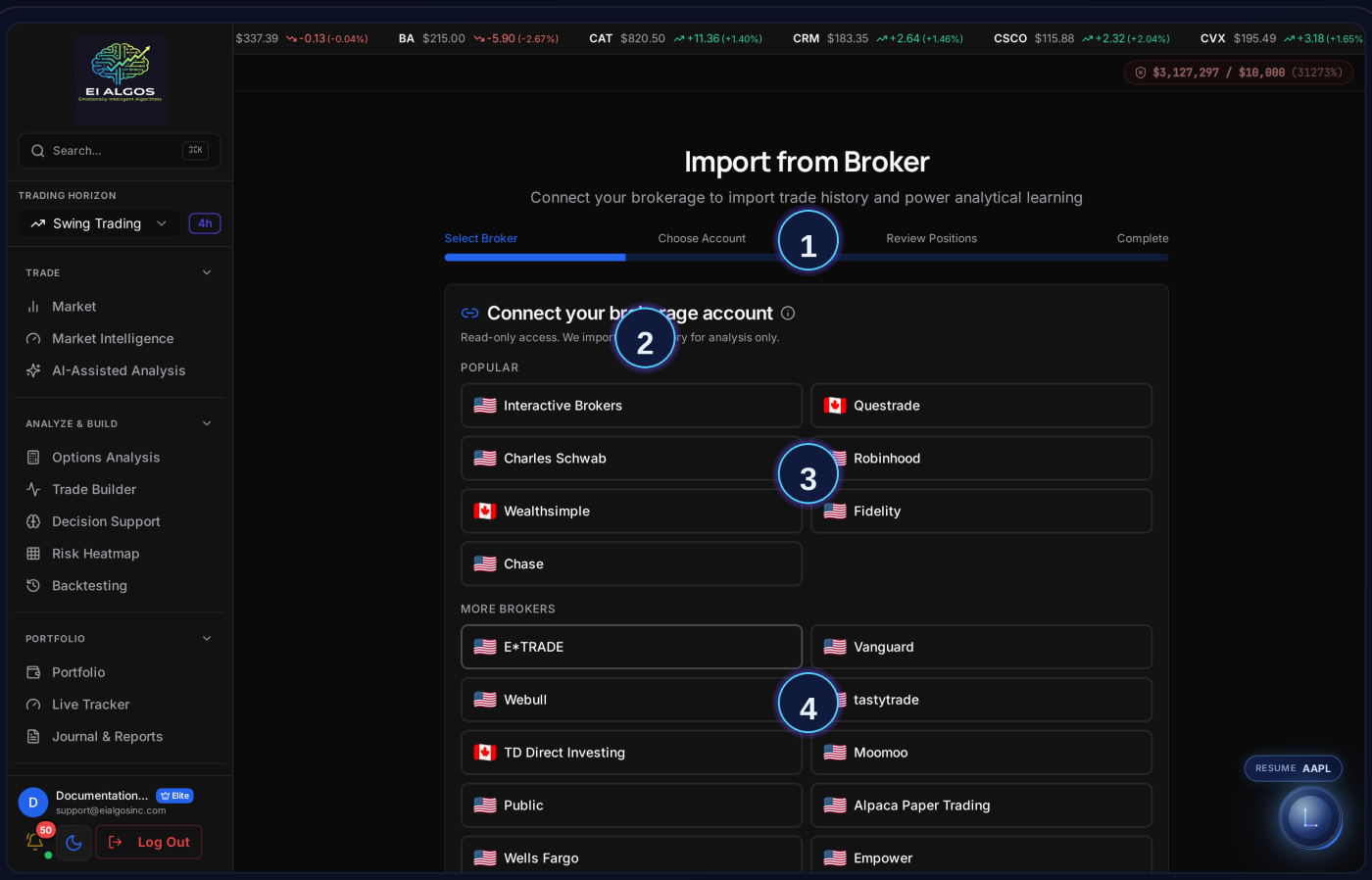
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P22 · ACCOUNT & SUPPORT · BROKER IMPORT | /settings

INCLUDED IN ALL PLANS (FREE · PRO · ELITE)

Broker Import · SnapTrade

Bring your real trading history in — securely, and read-only by default.



LIVE APPLICATION · DOCUMENTATION WORKSPACE · DESKTOP 1440×900 · AUTHENTICATED CAPTURE

WHY THIS MATTERS

Generic analytics describe the average trader; yours describe you. One secure, read-only connection imports your real history — and every score, insight, and coaching moment in the platform becomes personal from that point on.

→ Numbered Callouts

1 **Four-Step Progress** — Select Broker → Choose Account → Review Positions → Complete.

2 **Read-Only Assurance** — Access is read-only — trade history is imported for analysis only.

3 **Popular Brokers** — Interactive Brokers, Questrade, Schwab, Robinhood, Wealthsimple, Fidelity, Chase.

4 **Full Broker Grid** — Dozens more US and Canadian brokers — each flagged by region.

→ The Six-Step Import Journey

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STEP 1

Select Your Broker

Open the broker grid and choose from dozens of supported North American brokers — Interactive Brokers, Robinhood, Schwab, Fidelity, Questrade, Wealthsimple, Alpaca, Tastytrade, Webull, and more.

↓

STEP 2

Secure SnapTrade Connection

Authenticate directly with your broker through SnapTrade's OAuth flow. Your credentials never touch EI ALGOS — the connection is encrypted end-to-end and read-only by default.

↓

STEP 3

Import Your Accounts

SnapTrade discovers your brokerage accounts. Select which ones to link — each connected account is treated as its own sub-portfolio.

↓

STEP 4

Portfolio Imported

Your live positions appear in Portfolio and Live Tracker within seconds — symbols, quantities, cost basis, and current values, all synced automatically.

↓

STEP 5

Trading History Synced

Your historical trades flow into the Trade Journal, giving every past decision a permanent, reviewable record from day one.

↓

STEP 6

Behavioural Analytics Generated

EI ALGOS analyses your real history to build your Decision Score, Emotion Score, and TIS baselines — from this point, every insight in the platform is personal.

→ Built On Trust

Read-Only Default	OAuth Security	Encrypted	One-Click Disconnect
Trade permissions require explicit opt-in	Credentials stay with your broker — always	Data protected at rest and in transit	Revoke access anytime, purge on request

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PURPOSE
Connect a supported broker via SnapTrade and import positions, orders, and trade history so EI ALGOS can personalise your insights.

WHY IT EXISTS
Personalised Decision Intelligence needs your real data. SnapTrade provides secure, read-only broker connectivity across dozens of North American brokers.

PREREQUISITES
An active brokerage account with a SnapTrade-supported broker.

WHEN TO USE
Once during onboarding, and any time you switch or add a broker.

WHO SHOULD USE
Any user who wants personalised behavioural analytics grounded in real trades.

PLAN TIER
Included in all plans (Free · Pro · Elite)

→ Workflow · Step-by-Step

1. Open Settings → Integrations → Brokers.
2. Select your broker from the grid.
3. Complete the SnapTrade secure OAuth flow (credentials stay with your broker).
4. Choose read-only or read-and-trade permissions.
5. Preview the trades that will import.
6. Confirm import — your Portfolio and Journal are now personalised.

EXPECTED OUTCOME
EI ALGOS is now personalised to your actual trading practice — Decision Support, LIANA, and Behaviour Insights all use your real history.

SCREEN STATES

Not Connected — Grid of supported brokers with 'Connect' buttons.

OAuth In Progress — You are on the broker's site completing authentication.

Preview — Review of what will be imported before you confirm.

Connected · Read-Only — Sync active; positions and history flow into Portfolio and Journal.

Connected · Trade Permissioned — You have explicitly granted trade permissions; a bright indicator is shown.

Sync Error — Rare — broker connectivity blip. Retry button appears.

TIPS

Start with read-only. Only grant trade permissions after you fully trust the workflow.

You can connect multiple brokers — each is treated as a separate sub-portfolio.

COMMON MISTAKES

Sharing your broker credentials outside SnapTrade — never necessary and never asked for.

Assuming trade permissions are on by default. They are not. Opt-in only.

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KEYBOARD SHORTCUTS

G B I · Jump to Broker Integrations

MOBILE / TABLET NOTES

Full functionality on mobile. OAuth returns you to the app automatically.

TROUBLESHOOTING

Broker not listed? Contact support — SnapTrade adds brokers regularly.

Sync stuck? Disconnect and reconnect — a common broker-side fix.

Missing trades? Some brokers only expose the last 90 days by default — adjust the import window.

RELATED PAGES

Portfolio

Live Tracker

Trade Journal

Settings

FREQUENTLY ASKED

Q: Does EI ALGOS store my broker password? — A: No. Never. SnapTrade handles OAuth end-to-end.

Q: Can I disconnect anytime? — A: Yes — a single click in Settings → Integrations.

Q: Is my data encrypted? — A: Yes. At rest and in transit.

Q: Which brokers are supported? — A: The full list is inside the broker grid on the Integrations page and grows over time.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

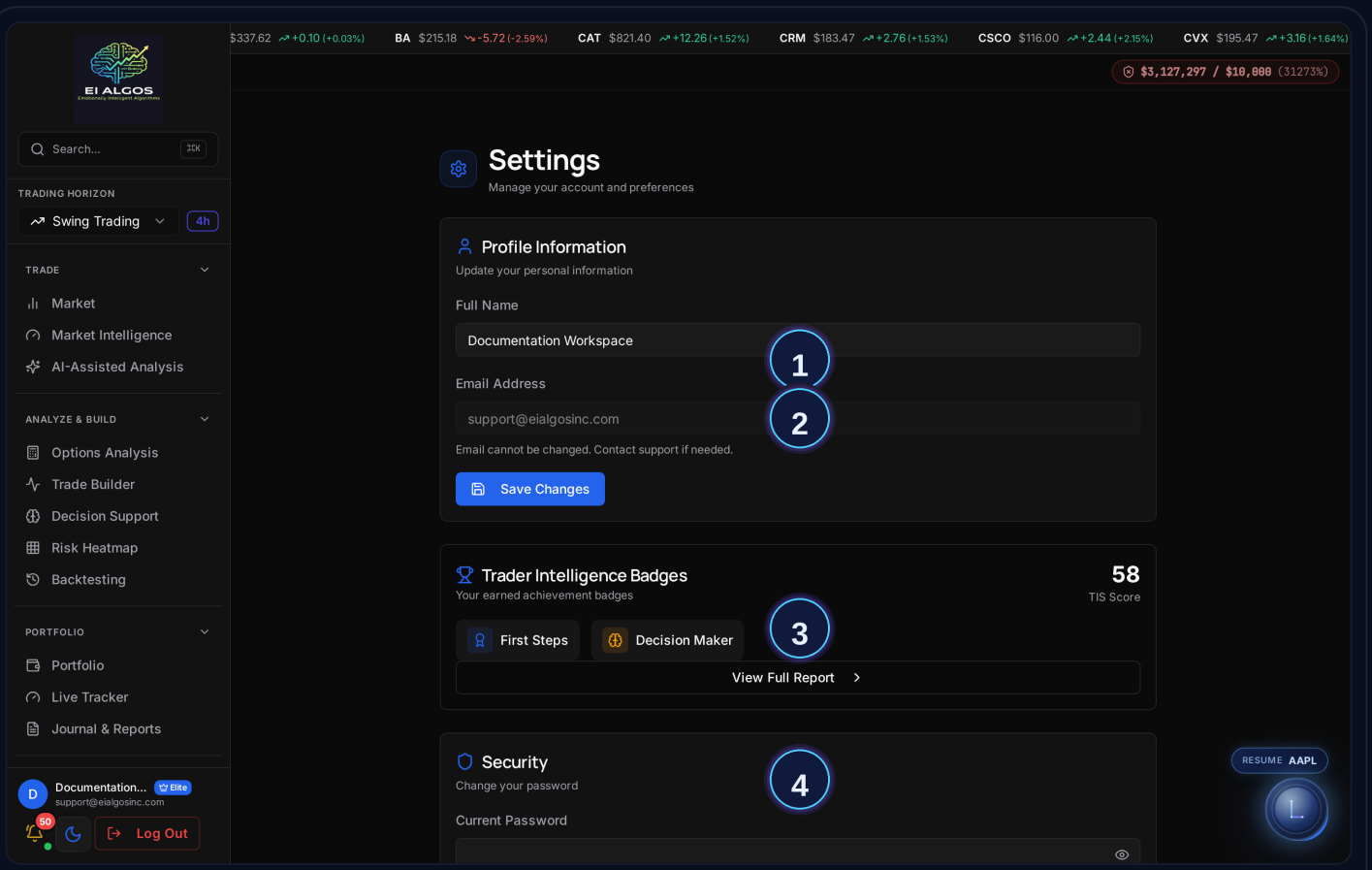
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P16 · ACCOUNT & SUPPORT · SETTINGS `/settings`

Settings

Fine-tune the workspace to your rhythm.



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WHY THIS MATTERS

Five minutes of configuration makes every future session faster and safer. Alerts reach you where you look, security matches your risk tolerance, and the workspace behaves the way you think.

→ Numbered Callouts

1. **Profile Information** — Update your display name; changes apply across the workspace.
2. **Locked Email** — Your sign-in email — contact support to change it.
3. **Trader Intelligence Badges** — Earned achievement badges and your current TIS score.
4. **Security** — Change your password; MFA options live below.

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WORKFLOW · THIS PAGE AT A GLANCE

Profile → Preferences → Notifications → Security

PURPOSE
Configure profile, preferences, notifications, integrations, privacy, and security.

WHY IT EXISTS
Personalisation removes friction.

PREREQUISITES
Signed-in account.

WHEN TO USE
On sign-up, and any time your situation changes.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open Settings from your avatar or the sidebar.
2. Complete Profile fields.
3. Prune Notifications to only what matters.
4. Enable MFA under Security.

EXPECTED OUTCOME
A workspace that feels calm and predictable.

SCREEN STATES

Default — Sensible defaults on first sign-in.

Customised — Your changes take effect immediately.

TIPS
Dark mode is the recommended default for long sessions.

COMMON MISTAKES
Enabling every notification. Prune ruthlessly.

KEYBOARD SHORTCUTS

G , · Jump to Settings

MOBILE / TABLET NOTES
Categories collapse into an accordion. Toggles are big and thumb-friendly.

TROUBLESHOOTING
Change not saving? Refresh — a stale session may need to be re-established.

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RELATED PAGES

Subscription

Privacy

Security

FREQUENTLY ASKED

Q: Can I export my data? — A: Yes — Privacy → Download.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

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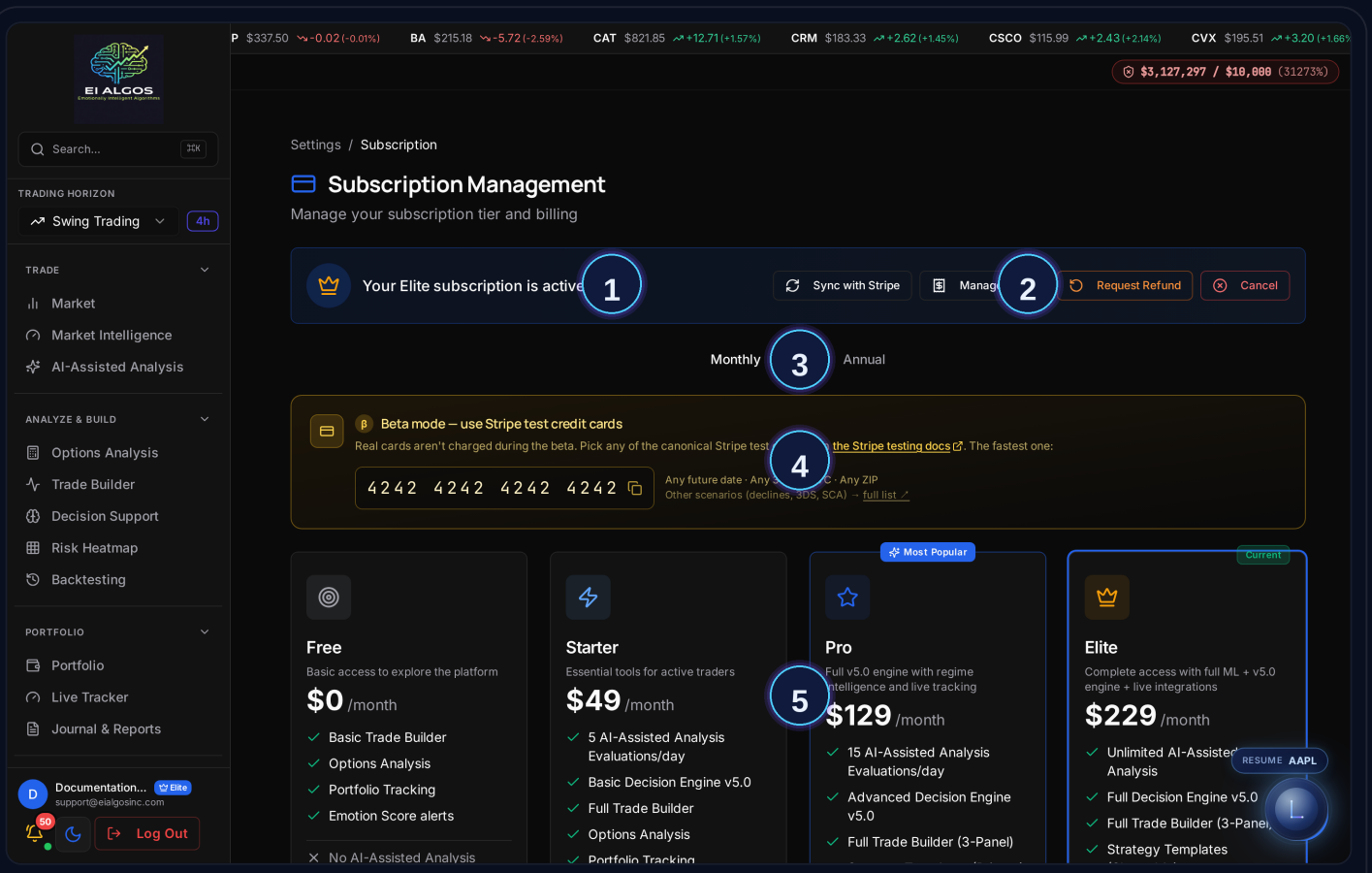
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P17 · ACCOUNT & SUPPORT · SUBSCRIPTION

/subscription-management

Subscription

Change plan. Pause. Cancel. Reprint an invoice. All in one page.



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WHY THIS MATTERS

Full self-service control of your plan means zero support tickets and zero surprises. Upgrade when you need more depth, pause when life happens, and download invoices on demand.

→ Numbered Callouts

1 **Active Plan Banner** — Your current tier and status with Sync, Manage Billing, Refund, and Cancel actions.

2 **Billing Actions** — Sync with Stripe · Manage Billing · Request Refund · Cancel — full self-service.

3 **Monthly / Annual Toggle** — Flip the entire plan grid between monthly and annual pricing.

4 **Beta Test-Card Notice** — During beta, use the Stripe test card shown — real cards are never charged.

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5 **Plan Cards** — Free · Starter · Pro · Elite with feature-by-feature comparison; your plan is highlighted.

WORKFLOW · THIS PAGE AT A GLANCE

Review Plan → Change / Pause → Download Invoice → Update Card

PURPOSE
Full self-service control over billing.

WHY IT EXISTS
Billing surprises destroy trust.

PREREQUISITES
Signed-in account.

WHEN TO USE
Anytime.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open Subscription.
2. Review the current plan card.
3. Take the action you need (upgrade, downgrade, pause, cancel, or download an invoice).

EXPECTED OUTCOME
Full transparency and control over your account.

SCREEN STATES

Active — Normal state — full functionality.

Trialing — Trial banner shows days remaining.

Paused — Read-only workspace; journal remains accessible.

Cancelled (End-of-Period) — Full functionality until the period closes.

TIPS
Pause instead of cancelling if you know you'll be back.

COMMON MISTAKES
Cancelling by email. The Subscription page is the fastest route.

KEYBOARD SHORTCUTS
G $ · Jump to Subscription

MOBILE / TABLET NOTES
Full functionality on mobile. Invoice download uses the OS share sheet.

TROUBLESHOOTING
Payment failed? Update your card in the same page and retry.

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RELATED PAGES

Settings

Privacy

Security

FREQUENTLY ASKED

Q: When do I lose access on cancel? — A: At the end of the current billing period.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

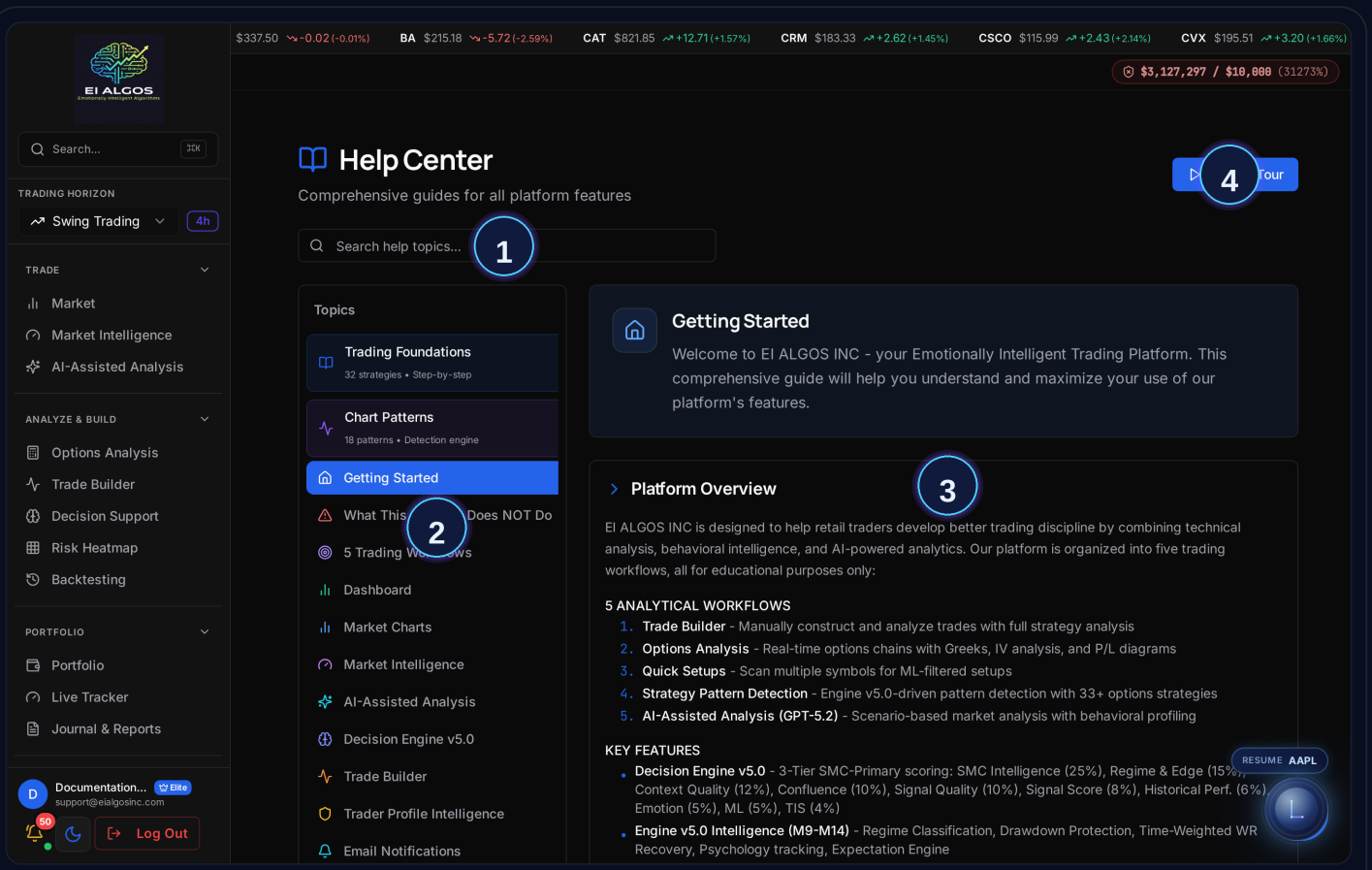
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P18 · ACCOUNT & SUPPORT · HELP /help

Help Center

Everything you need — searchable, illustrated, calm.



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WHY THIS MATTERS

The fastest fix is the one you find yourself. Searchable articles plus a LIANA hand-off mean most questions are resolved in under a minute — without leaving your workflow.

→ Numbered Callouts

1. **Search Help Topics** — Instant keyword search across every guide.
2. **Topics Sidebar** — Trading Foundations, Chart Patterns, Getting Started, workflows, and every feature guide.
3. **Article Reader** — The selected guide renders here with structured sections and key features.
4. **Replay Tour** — Re-run the guided product tour any time.

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WORKFLOW · THIS PAGE AT A GLANCE

Search Topic → Read Article → Follow Related → Ask LIANA

PURPOSE
Give you fast, self-serve answers to any question.

WHY IT EXISTS
A trader who can help themselves is a confident trader.

PREREQUISITES
Signed-in account.

WHEN TO USE
Anytime.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open Help.
2. Search for the topic.
3. Read the article.
4. If still stuck, ask LIANA or open a support ticket via Feedback.

EXPECTED OUTCOME
Answers to most questions without leaving the platform.

SCREEN STATES

Idle — Featured articles shown.

Searching — Live results as you type.

Article — Full article view with related links.

TIPS
Bookmark this page for one-click access.

COMMON MISTAKES
Emailing support before searching Help. Most answers are here.

KEYBOARD SHORTCUTS

G H · Jump to Help

/ · Focus search

MOBILE / TABLET NOTES
Search stays sticky. Articles are one-column, readable.

TROUBLESHOOTING
Search empty? Try broader terms or open the category tree.

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RELATED PAGES

AI Copilot (LIANA)

FAQ

Feedback

FREQUENTLY ASKED

Q: Is Help kept up-to-date? — A: Yes — updated with every release.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

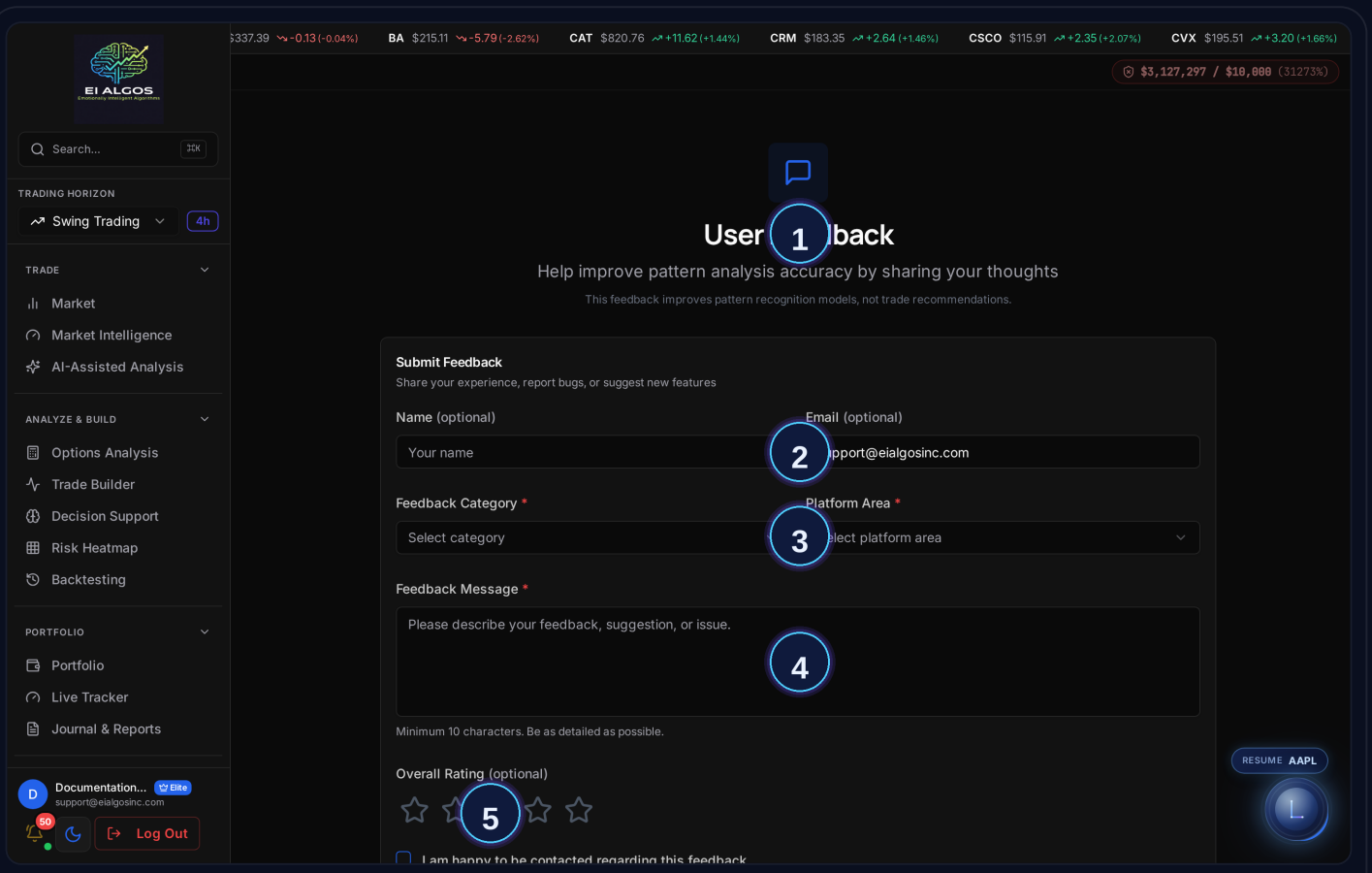
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P19 · ACCOUNT & SUPPORT · FEEDBACK `/feedback`

Feedback

Tell us what to build — or what to fix.



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WHY THIS MATTERS

Your feedback routes directly to the product team that ships weekly. Users who report friction see their fixes ship — this page is the shortest path between your annoyance and its resolution.

→ Numbered Callouts

1. **Feedback Header** — What this form improves — pattern analysis models, not trade recommendations.
2. **Contact Fields** — Optional name and email (pre-filled) so the team can follow up.
3. **Category + Platform Area** — Route your feedback to the right team: bug, suggestion, or feature area.
4. **Feedback Message** — Describe the experience — minimum 10 characters, detail helps.
5. **Overall Rating** — Optional 5-star rating of your platform experience.

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WORKFLOW · THIS PAGE AT A GLANCE

Choose Category → Write Feedback → Attach Screenshot → Submit

PURPOSE
Direct channel to the EI ALGOS product team.

WHY IT EXISTS
Every good feature in this platform came from a user request.

PREREQUISITES
Signed-in account.

WHEN TO USE
Anytime.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open Feedback.
2. Choose category.
3. Write your feedback.
4. Attach a screenshot (optional but often helpful).
5. Submit.

EXPECTED OUTCOME
Your voice reaches the team.

SCREEN STATES

Composing — Auto-saves as you type.

Submitted — Confirmation banner + email.

TIPS
Screenshots quadruple bug-fix speed.

COMMON MISTAKES
Filing multiple tickets for the same issue. Update the original instead.

KEYBOARD SHORTCUTS
G F · Jump to Feedback

MOBILE / TABLET NOTES
Full functionality, including camera-roll attachment.

TROUBLESHOOTING
Cannot submit? Check your internet — feedback is drafted locally and syncs when back online.

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RELATED PAGES

Help Center

FAQ

Legal

FREQUENTLY ASKED

Q: Will I hear back? — A: For bugs, yes — always.

ACCESSIBILITY

Full keyboard navigation supported

ARIA labels on interactive elements

WCAG AA colour contrast throughout

Screen reader friendly

IMPORTANT REMINDER

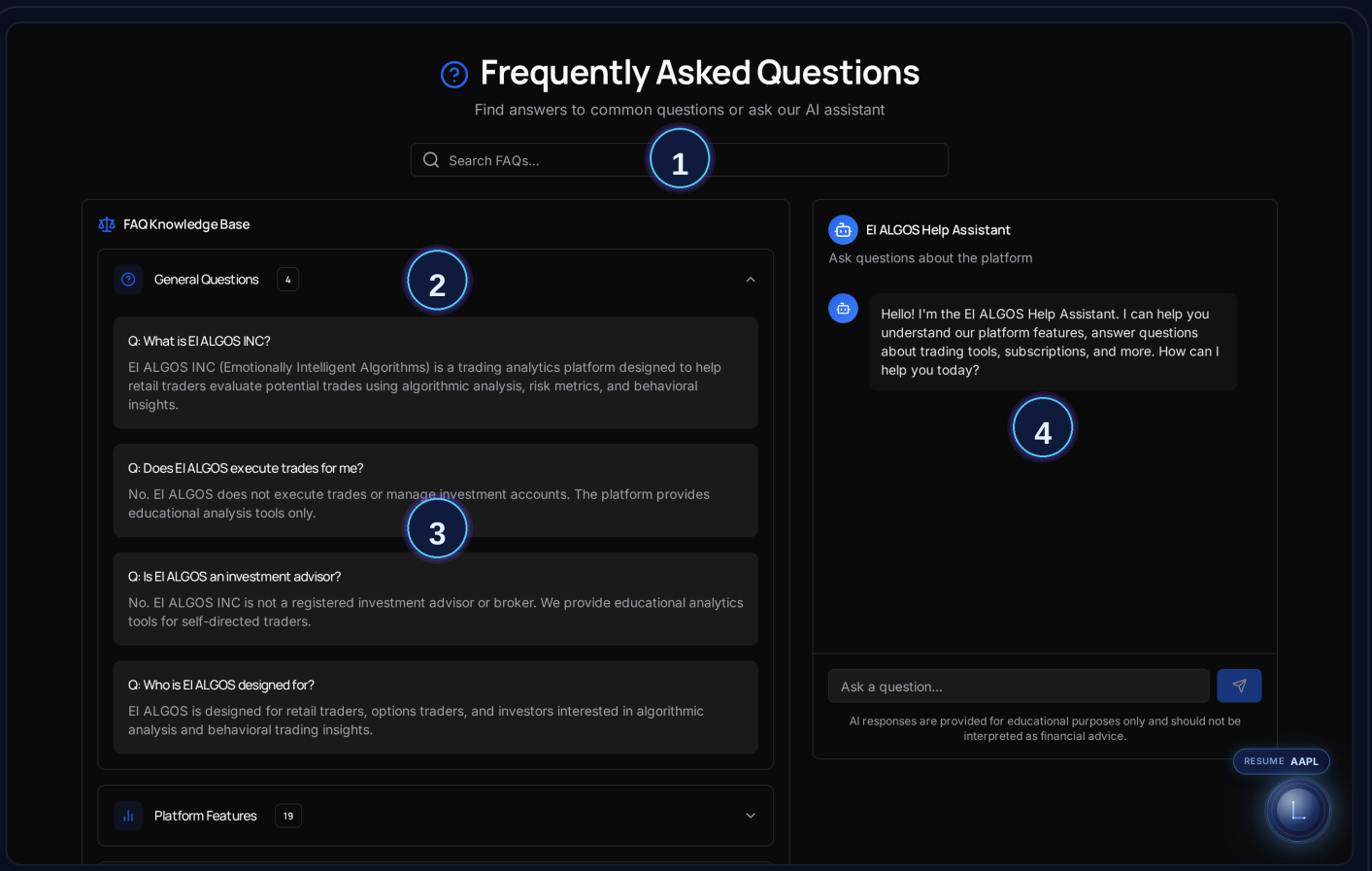
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P20 · ACCOUNT & SUPPORT · FAQ `/faq`

FAQ

Short answers to the questions we hear most.



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WHY THIS MATTERS

The questions every new trader asks, answered once and kept current. Checking here first saves you the support queue for the questions that genuinely need a human.

→ Numbered Callouts

1. **Search FAQs** — Keyword search across the full knowledge base.
2. **Knowledge Base Categories** — General Questions, Platform Features, and more — expandable sections.
3. **Q&A Cards** — Plain-language answers, kept current with every release.
4. **AI Help Assistant** — Ask a free-form question — answers are educational only.

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WORKFLOW · THIS PAGE AT A GLANCE

Search → Browse Category → Expand Q&A → Follow Related

PURPOSE
Cover the fifteen most common user questions in a single place.

WHY IT EXISTS
A well-tended FAQ is often the fastest path to an answer.

PREREQUISITES
Signed-in account.

WHEN TO USE
Any time you have a quick question.

WHO SHOULD USE
All users.

PLAN TIER
Included in all plans

→ Workflow · Step-by-Step

1. Open FAQ.
2. Search or browse.
3. Expand a question to see its answer.

EXPECTED OUTCOME
Most questions answered in seconds.

SCREEN STATES

Idle — All categories visible.

Filtered — Live search results as you type.

TIPS
If your question is not here, ask LIANA — she often knows.

COMMON MISTAKES
Waiting on support for a question the FAQ answers instantly.

KEYBOARD SHORTCUTS
G Q · Jump to FAQ

MOBILE / TABLET NOTES
Search stays sticky. Cards expand full-screen.

TROUBLESHOOTING
Missing an FAQ? File it via Feedback — the team adds them frequently.

RELATED PAGES
Help Center
AI Copilot (LIANA)
Legal

FREQUENTLY ASKED
Q: Does EI ALGOS tell me what to buy? — A: No. EI ALGOS is educational and analytical.
Q: Are scores personalised? — A: Yes.
Q: Is the Journal private? — A: Yes.

ACCESSIBILITY
Full keyboard navigation supported
ARIA labels on interactive elements
WCAG AA colour contrast throughout
Screen reader friendly

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EI ALGOS

BEHAVIORAL DECISION INTELLIGENCE™

The operating system for self-directed traders. This User Guide is a living document — it will grow with every release.

www.eialgosinc.com

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