Tradency New Platform

Table of Contents

1 Overview

1.1 Document Purpose

The purpose of this document is to describe the new Tradency Platform, while emphasizing the new features added and changes from the previous platform version.

This is not a tutorial document, and it should not be used for educational purposes.

1.2 New Tradency Logo

In the images of the new platform, you will find new Tradency logo.

1.3 New Tradency Platform Structure

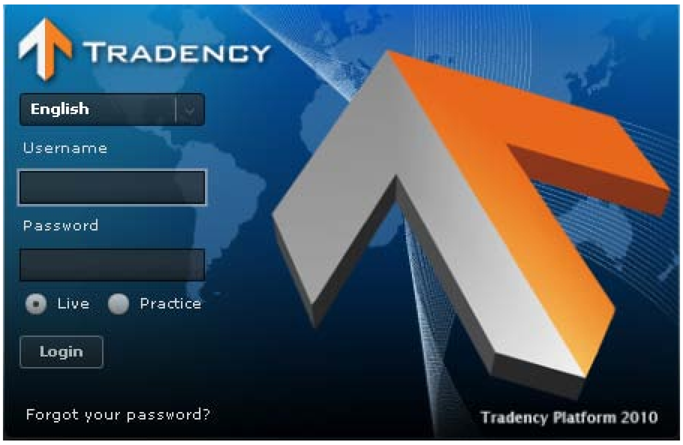
The platform contains five main sections:

1. Strategies (Including Smart filter, Performance filter, Watch-List and Strategy Card)
2. Positions (Including Open positions, Orders and Closed positions)
3. Portfolio
4. Rates
5. Account Activities

In this document, all the sections and their unique changes and new features are described.

2 Login

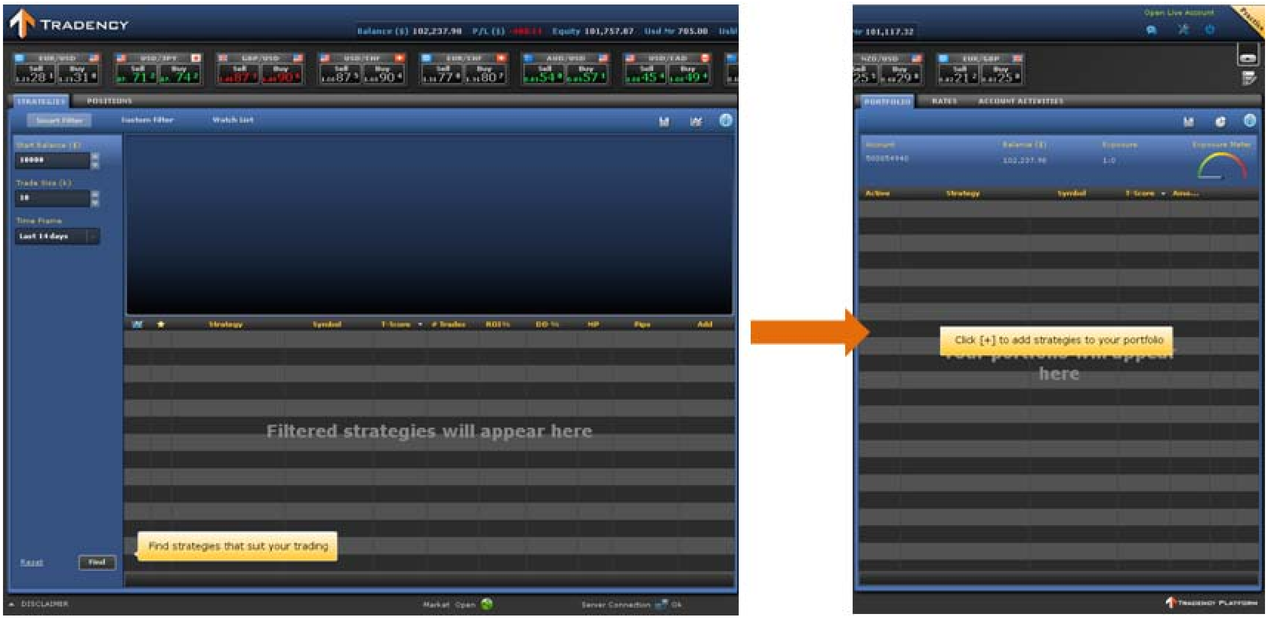
2.1 Platform Login Screen



- **Broker Logo:** broker's logo (the addition "*with Tradency*" is added next to broker's logo)
- **Main image:** can be modified according to brokers preference
- **Languages:** The new platform supports 14 languages

2.2 First Time Login

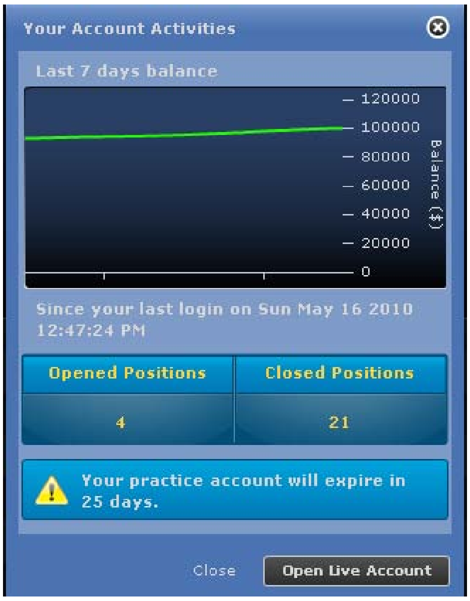
- **Password:** User receives username and password upon registration. After the user submits the user name and password on first login, he will be asked to change the password for security reasons
- **Structured flow for creating a portfolio:** On first login, the user will be guided about the 2 simple actions he needs to perform in order to create a portfolio. See image below.



2.3 After First Time Login

Welcome message (* New feature)

The welcome message appears every time a user logs into the platform (after account activation), and provides a "snapshot" of the changes that occurred in the account since the user's previous login.



The welcome message includes the following updates:

- Account balance graph for last 7 days
- Details about the time of the last login:
  - New open positions
  - New closed positions
- Days left for practice account (only in practice accounts)
- Open live button (only in practice accounts)

In order to close the "welcome message" and start trading the user can either click on the "x" icon on the upper right corner or on the word "close" in the bottom of the message.

3 Header & Footer

3.1 Platform Header

The top header includes the following items:

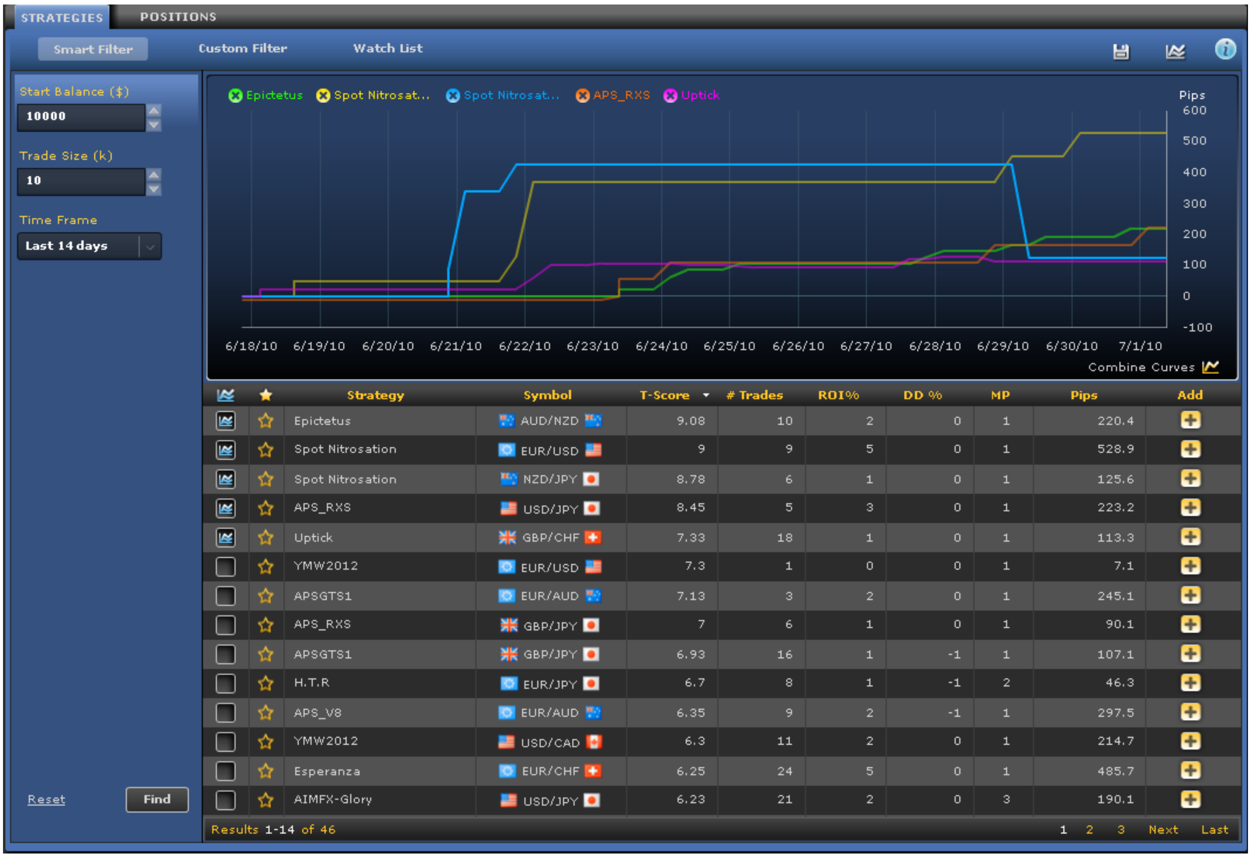
- Broker's logo in left corner (the addition "*with Tradency*" is added next to broker's logo)
- Account Balance; P/L (according to account currency); Equity; Margin; Usable Margin
  (In the previous platform the balance, P/L and margin were displayed in the "history" and "Positions" tabs)
- Link to Open a Live Account or Funding Page according to account type
- Support (Mailto or link to 'Contact Us' + Support Phone + Live Chat link) according to broker settings
- Settings (In the previous platform the settings were in "My Settings" tab)
- Log out
- Account type (Practice/ Live)- in right corner

3.2 Platform Footer

The footer, at the bottom of the platform, includes the following items:

- Link to disclaimer (In the previous platform the full disclaimer appeared on the bottom of the page). In addition, at the first login to the platform, the user must confirm reading and accepting the disclaimer, otherwise he cannot access the platform.
- Market status notification (Open / Close)
- Server connection notification (Connected / Disconnected)
- Tradency Platform Logo- opens in new window www.tradency.com

4 STRATEGIES



In the 'Strategies' section, users have 2 main filters to help them find suitable strategies for their portfolio:

1. **'Smart filter'**
2. **'Performance filter'** (formerly known as 'System seeker')

Another new feature in the strategies section is the **'Watch List'**.

4.1 Smart Filter (* New feature)

Allows finding appropriate strategies based on start balance and trade size. This filter calculates performance data of all strategies during the selected timeframe, and shows only those strategies that fit the trader's criteria. Meaning, only strategies which 'minimum pips' times chosen 'trade size' is bigger than the chosen 'start balance'.

Filter Parameters:

- Start Balance= The amount of money the trader intends to use for trading (regardless his current account balance).
- Trade size (k)= The trade size the trader intends to use for trading.

Filtered Results Display:

The results are presented in a table and on a graph. (In the previous platform, the results were presented only in a table).

- The 'Graph' area can contain up to 5 different strategies.
- The trader can add strategies from the table, by clicking on the '+' sign, or directly from the graph.
- Combine curves= Shows the results of all the strategies in one curve. This curve presents how the strategies performed together and actually simulates a portfolio with the chosen strategies.

New Criteria in Smart Filter:

- **T-score**= Unique Tradency scoring method, indicating strategies' relevancy to current market conditions. T-score takes into consideration strategies' risk and reward.
- **ROI % (Return On Investment)**= Calculated by dividing strategies' Profit/Loss in pips by 'Start Balance' entered in the Smart Filter, during the selected time frame.
- **Risk %**= The highest losing amount of pips in percentage terms, calculated using the 'Start Balance' entered in the Smart Filter, during the selected time frame.

4.2 Performance filter (formerly known as 'System Seeker')

Allows to view and analyze all strategies trading results and statistics, and to filter and sort the results by any chosen criteria. The user can choose the criteria he would like to see in the results table. There are:

- **11** criteria to filter by
- **17** criteria to view in results table

4.3 Watch List (* New Feature)

This feature provides a quick access to selected strategies of interest.

The 'Watch List' can be used to follow up on strategies performance before actually adding them to the portfolio. Users can add strategies to 'Watch List' from the table, the Strategy card and directly from the graph.

4.4 Strategy Card

The strategy card presents detailed information about each strategy. To access the strategy card click on the strategy name (in the previous platform users could access the strategy details, from the performance tab).

New features in the strategy card:

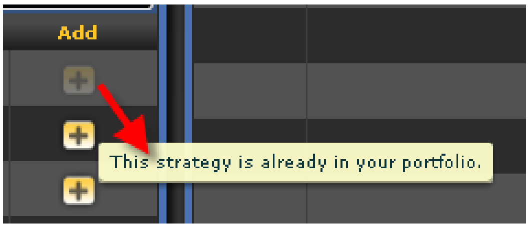
- The card statistics are being updated in real time (upon every position closure).
- The card contains 2 graphs: Strategy curve (P/L) and T-Score.
- The results are displayed per symbol or by timeframe.
- The strategy can be added to the portfolio or to the watch list, directly from the strategy card.
- The card contains detailed performance data about the strategy.

4.5 Money Management

After the user chooses to add strategy to his portfolio, he should set the trade size.

Additional Money Management options (Fixed Ratio and Fixed Fractional) are up to the broker to decide. Brokers can choose to disable this feature.

* **New feature:** After a strategy is added to Portfolio, there is an indication that this strategy and symbol is already in his portfolio:



5 PORTFOLIO

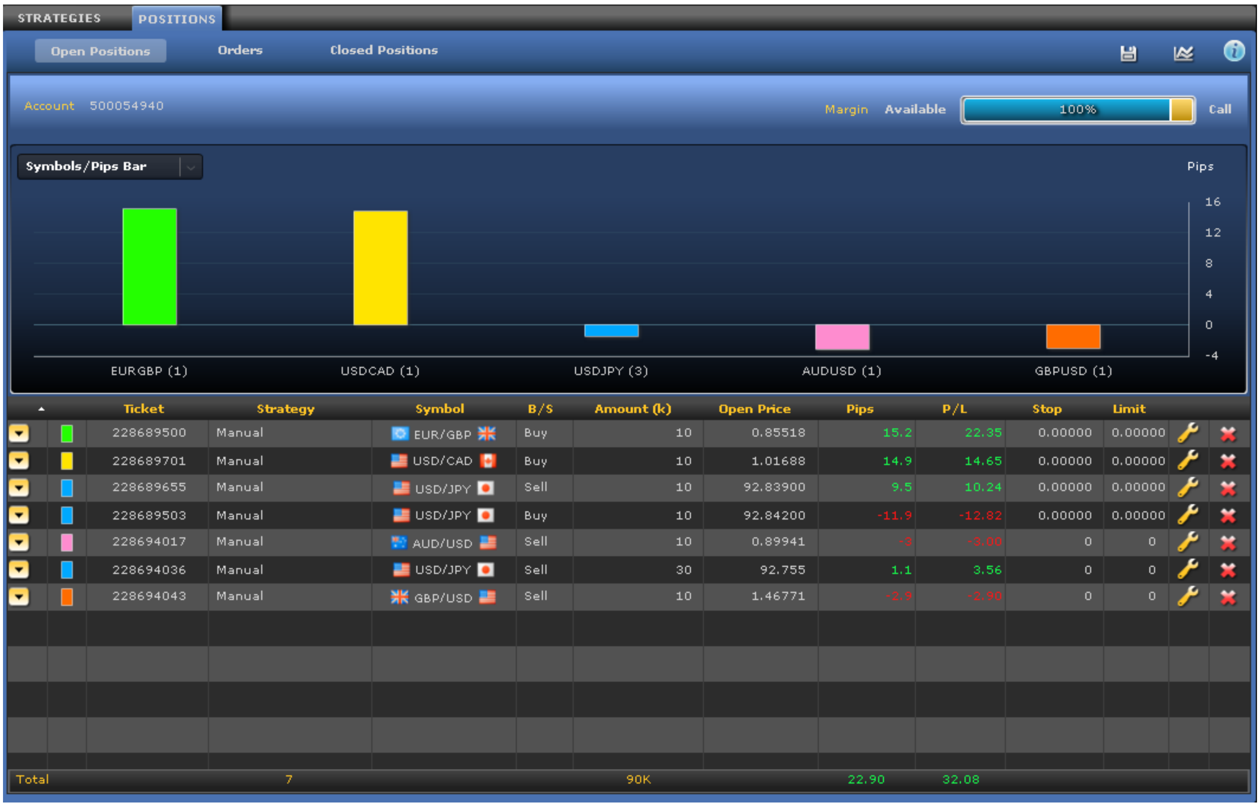
The trading Portfolio consists of all the strategies that were chosen to trade in the account. From the moment a strategy is added to the portfolio, every trade opened by this strategy is sent to execution in the trader's account.

New features in the portfolio:

- The exposure of the portfolio (formerly called 'Leverage') is represented as a number and by the exposure meter (for visual presentation). In the exposure meter: the closer the needle is to the red zone, the more risky the portfolio is.
- Active/ Inactive- In the new platform, users can choose to temporarily inactivate a strategy in the portfolio at any time. He can reactivate the strategy again in the future.
- Portfolio display- The portfolio can be presented on a table or as a pie chart.

6 POSITIONS

6.1 Open Positions



In the open 'Open positions' section users can view all the open positions that were opened either by strategies or manually in the account. There are 2 display modes: table and graphs.

New features in Open positions:

- Margin Meter- is an indication of the available margin in the account and a notification for 'Margin Call'.
- Graph display (* New feature) - In the graph area, users have an option to view several display modes: (they can choose the preferred display from the left hand corner of the graph)
  - Symbols distribution by Pips Bar
  - Strategies distribution by Pips Bar

6.2 Orders (* New feature)

In the new platform, users can view all the entry positions set manually in their account (called 'orders'), before they are opened when reaching the entry price.

6.3 Closed Positions

The 'Closed positions' section contains a list of all the positions that were closed either by strategies or manually in the account. *(In the previous platform, this section was called "History")*

New features in Closed positions:

- Graph display (* New feature) - In the graph area, users have an option to view several display modes: (choose the preferred display from the left hand corner of the graph)
  - Total P/L per Strategy & Symbol Bar
  - Total P/L Curve

7 RATES

7.1 Rates Section

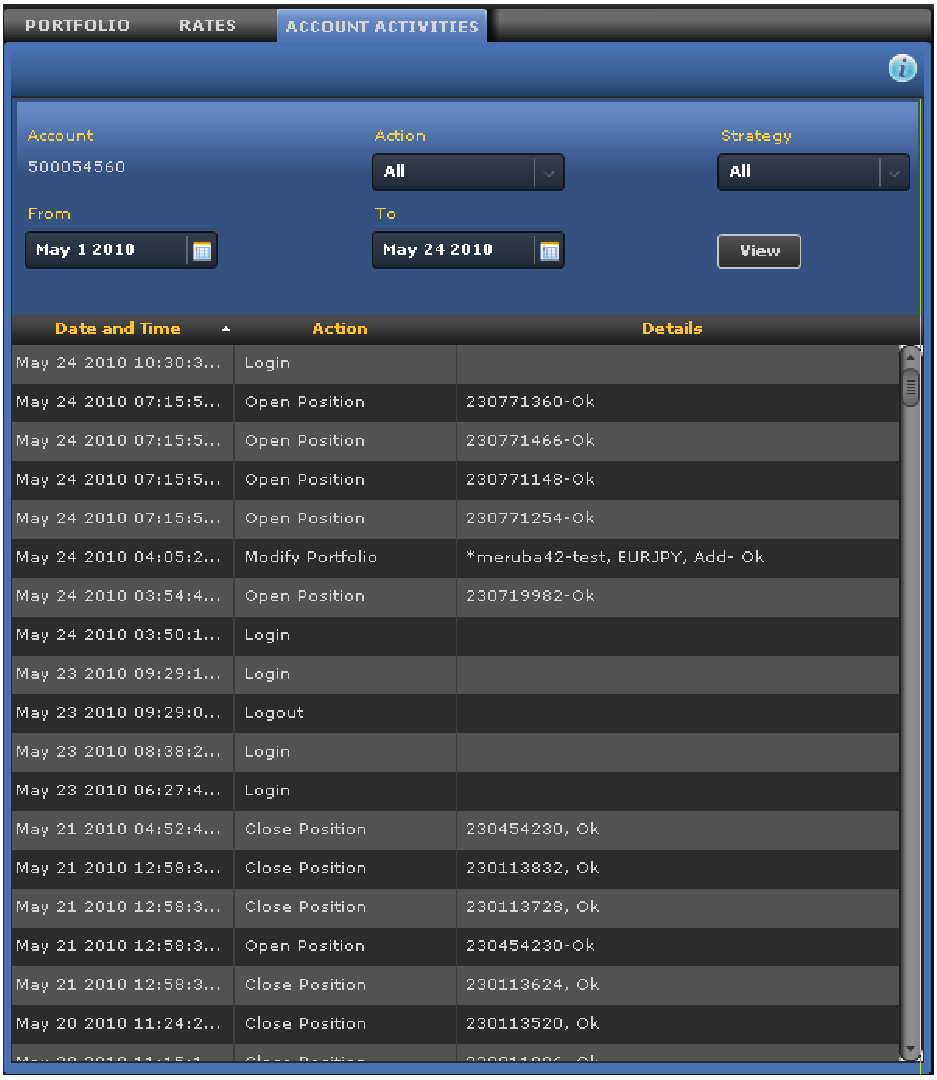
7.2 Rates in header

The ‘Rates’ section allows users to view the Bid and Ask prices of all the trading symbols in the platform.

New features in the Rates section:

- Users can open a manual position by clicking on a rate on the rates display. (In the previous platform it was done by clicking “open manual position” in the positions tab)
- Users can choose which rates will be shown in the rates display (on the top of the screen) by clicking on ‘Rates Setting’ icon on the right side, or they can hide it completely by clicking on the minimize icon.

8 ACCOUNT ACTIVITIES (* New feature)



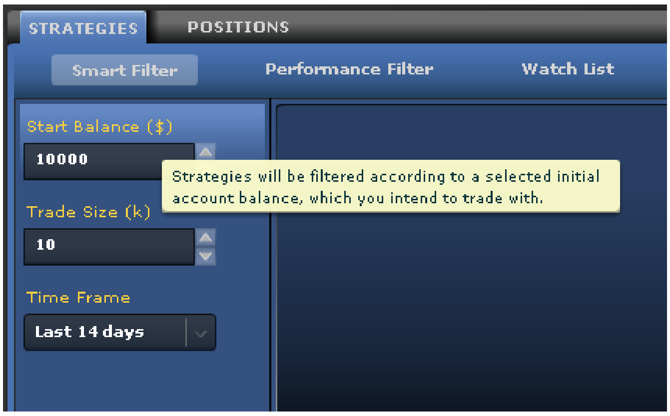
This section contains a description of all the activities, which took place in user accounts.

Activities such as: login to the platform, positions opening or closing and any modification in users' portfolio. This data can be filtered by timeframe, strategy or by a specific action type.

This will allow users to monitor the activity in their accounts.

9 Additional Features

9.1 Terms Explanations



When a user "hover" the cursor over a term, an icon or a feature, a tool tip appears with an explanation of that term, icon or feature.

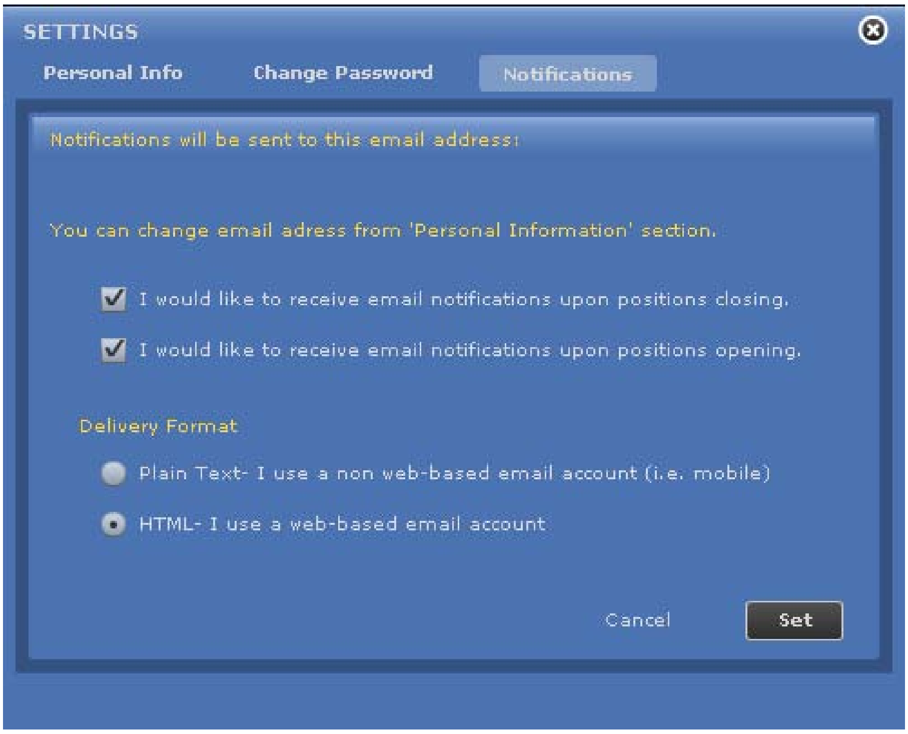
9.2 More Info (i)

Detailed information about each section is available when clicking on the "i" icon in the upper right side of the section. The information includes:

- Short description about the section
- Terms descriptions
- Notes and Tips

9.3 Mail Delivery Format

In the new platform, there is an option to choose the delivery format for receiving email notifications upon positions opening and closing. There are 2 options available: Plain text and HTML.



10 General Information

10.1 Resolution

The best resolution to view the platform is **1280 x 800 and up**.

Some of the platform's features are automatically adjusted according to user's screen resolution (e.g.: number of rates in header and number of columns to show in tables).

10.2 Basic New Terms

Previous Term	New Term
Demo	**Practice**
System	**Strategy**
Pair	**Symbol**
Leverage	**Exposure**
Profit	**P/L**
History	**Closed Positions**

10.3 New Trading Policy for Strategies

- Maximum Stop and Limit for each position is +/-**300 pips**
- A strategy can hold **up to 4 positions** at the same time for each currency symbol
- Should a strategy trade multiple positions at once: there must be a difference of **at least 30 min**, between the opening times of each of the positions

These are INNER rules, agreed among Tradency partners. These rules should not be announced or published to any brokers' clients.

10.4 Removed Features

- **Reverse mode**- removed from Money Management options
- **Top Portfolios**- not available anymore
- **Advanced MM option**- is no longer displayed by default, can be added according to brokers decision