



**A•MARKETS**

Your online broker

# **ROBOX BY AMARKETS USER GUIDE**

AMarkets LTD,  
Suite 305, Griffith Corporate Centre 1510, Beachmont,  
Kingstown, Saint Vincent and the Grenadines  
[info@amarkets.com](mailto:info@amarkets.com)



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# 1. INTRODUCTION

## 1.1 Product Summary

The RoboX is a fully automated solution that helps you choose the best suited trading package, the packages are constantly updated using a smart algorithm.

The RoboX is made for users who want to trade in the Forex market, believe in the power of algorithm trading, and want to use the power of experts knowledge of how they choose the best trading strategies for them and when to modify\replace them.

The RoboX packages follow a unique logic, which is refreshed in pre-determined intervals to bring the most relevant strategies for that logic, ensuring the client has the strategies that fit the best. The RoboX journey begins with a simple, non-committing wizard to provide the best suitable packages for you. By learning your trading methods, the wizard you specific, made for you, offered packages performance. Once finding the suitable packages for you, you may now sign up to the service and simply get started!

After sign-up you may use the dashboard to follow up on your account progress, to track the packages performance in the account and modify them. You will also be presented with the current open trades and the trade history (closed positions). The platform also allows you to modify your personal settings and notification status.

The RoboX platform provides you with an experience of actual advisory alongside helpful notifications of your account's status, alerts when actions needs to be taken and celebrates achievements when they occur.

## 1.2 Document Introduction

This document describes the functionalities provided by the RoboX platform and the components you may find on each page. Note that slight variations may be found between brokers due to differences in restrictions and configurations.

## 2. WIZARD QUESTIONNAIRE

The welcome wizard is a simple questionnaire that greets client to the RoboX before login. Answering the questions allows us to get to know you and your trading methods and by that match you the most suitable packages for you.

Simply click on the relevant answer in each of the questions and the relevant packages will appear on the right bottom side of the screen. The results are visible in both graph and information on the page, this allows you to compare the packages that came up through the graph, or through their profit Vs risk score. To view even more information on a package – you may click on the expand drop down button and examine current trading strategies, open signals, past signals, performance statistics and additional package information.

To finish the wizard choose 1 or more packages, and use the green bottom right button sign-up and start trading!

**1. Your starting balance**  
5,000\$

**2. Describe your trading method:**  
Minimizing Loss | Maximizing Gain

**3. How would you describe yourself as a Trader?**  
Conservative | Moderate | Aggressive

**My risk assessment**

**Choose a Package**  
RoboX found relevant results for you

Package	Package PL %	Package Risk %	Recommended Size
<input checked="" type="checkbox"/> Onyx 3132	14.9%	-4%	1K
<input type="checkbox"/> Granet 2133	15.3%	-2.8%	1K
<input type="checkbox"/> Granet 5121	10.3%	-5.2%	1K

Select and create account

### Wizard Terms and Definitions

**Question 1** – define your starting balance, this would be the initial deposit that you plan to place in your account.

**Question 2** – describe your trading method, this would help us characterize the trading style that will fit you best:

- Maximizing gains stands for higher profits but higher risks;
- Minimizing loss stands for slower and steadier profits over time and lower risks.

**Question 3** – how would you describe yourself as a Trader? – This would help us understand a little about your filtering preferences:

- Conservative – Trading with minimal risks reflected by low risk strategies and packages;
- Moderate – Trading with an average risk level reflected by “Moderate” suitable strategies and packages;
- Aggressive – Trading with a relatively high risk level reflected by strategies and packages that represent this trading style.

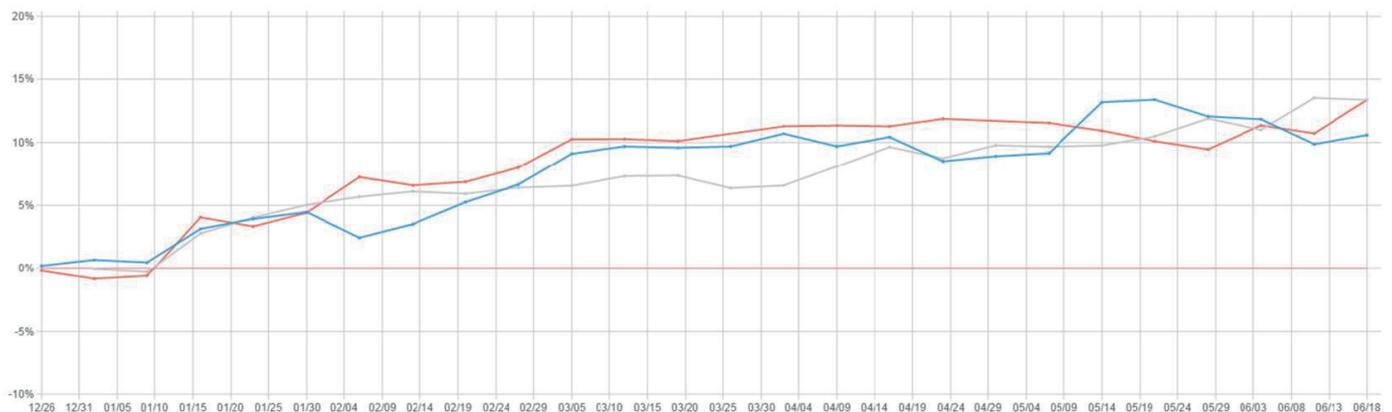
## Package Information Area

 **more\less info** – click this button on the right corner of each package to open the package information area. The package information area contains general info and statistics as well as more detailed information regarding the selected package.

**Package P\L %** – Describes the package profit to loss ratio in percentage. **Green** represent a positive ratio (profit) while **Red** with combination of “-“mark will represent a negative ratio (loss).

**Package Risk %** – Describes the Risk calculated for the package based on its performance and P\L.

**Recommended Size** – Describes the recommended trade size (in “K”) that suits the package best to generate optimal results. (Based on the strategies that build the package in combination with the info assembled from the Wizard’s questionnaire filled by clients).



 Onyx 3132
Package P\L % **14.9%**
Package Risk % **-4%**
Recommended Size **1K** 

Onyx 3132 package is an assembly of trading strategies that matches both user’s preferences and the package smart rule. The rule contains a variety of trading indicators such as: APT (Average profit trade (in pips)) Pips (Total pips.) TotalTradeCount (amount of trades.) . The Onyx 3132 Package can contain a variety of strategies. Onyx 3132 contains maximum 3 strategies trading with Forex and back tested over the last Last 30 days , Last 90 days , Last 6 months , Last 60 days .

Strategies
Current Signals 4
Past Signals
Package Information

Strategy Name	Symbol
 WaveRider	GBPJPY
 GoldenFx	AUDJPY
 Perfection5	GBPUSD

**Strategies Tab** – holds list of current trading strategies in this package and the symbol they are permitted to place trades for.

**Current Signals Tab** – holds a list of current open signals by this package and the information provided on each signal:



- **Strategy name** – The strategy that placed the trade;
- **Symbol** – The currency pair traded;
- **B\S** – Indicates a Buy or Sell signal;
- **P\L** – The profit the signal would have accumulated assuming the last market price would have been realized. This parameter does not refresh once loaded;
- **Open time** – The date and time signals was opened on package.

**Past signals Tab** – Holds list of past signals traded on this package that are already closed and the information provided on each signal:

- **Strategy name** – The strategy that placed the trade;
- **Symbol** – The currency pair traded;
- **B\S** – Indicates a Buy or Sell signal;
- **P\L** – The profit the signal accumulated;
- **Open time** – The date and time signals was opened on package;
- **Close time** – The date and time signals was closed by the package.

**Package Information Tab** – Holds different statistics and data on the package:

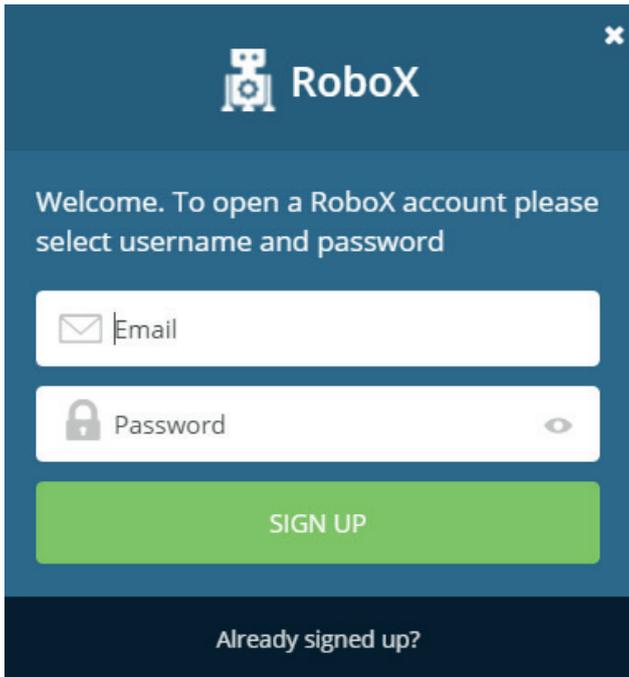
- **Creation Date** – The month package was created in Tradency;
- **Of Strategies** – The number of strategies a package may hold at any given time. In rare cases when a package does not find relevant strategies, a smaller number may be found;
- **Total Trades** – The amount of trades opened by package in selected time frame;
- **Package Refresh** – Mentions the frequency of strategy refreshment in the package, the time interval mentioned is the time the package runs the logic on all Tradency's strategies and selects the most relevant ones. Note that the strategies may not change every refresh as they may still be the optimal choice.

**Package Description** – Each package contains a short "Package Description" paragraph which elaborates on the characteristics that assemble the package (in terms of strategies, trading parameters and timeframes).

## Choosing Packages

To setup your portfolio, simply choose one or more packages by checking the box to the left of their names   Onyx 3132 and clicking   on the bottom of the screen.

You must login with your email and password at this point. New users that did not sign-up yet are required to type-in their email and password of choice. Existing users can simply be redirected to login via their existing credentials by clicking: "Already signed up?"



RoboX

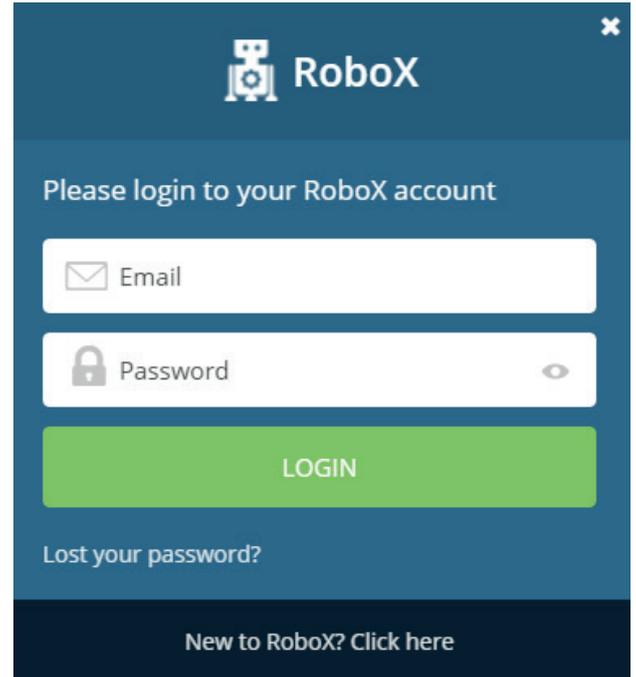
Welcome. To open a RoboX account please select username and password

Email

Password

SIGN UP

Already signed up?

RoboX

Please login to your RoboX account

Email

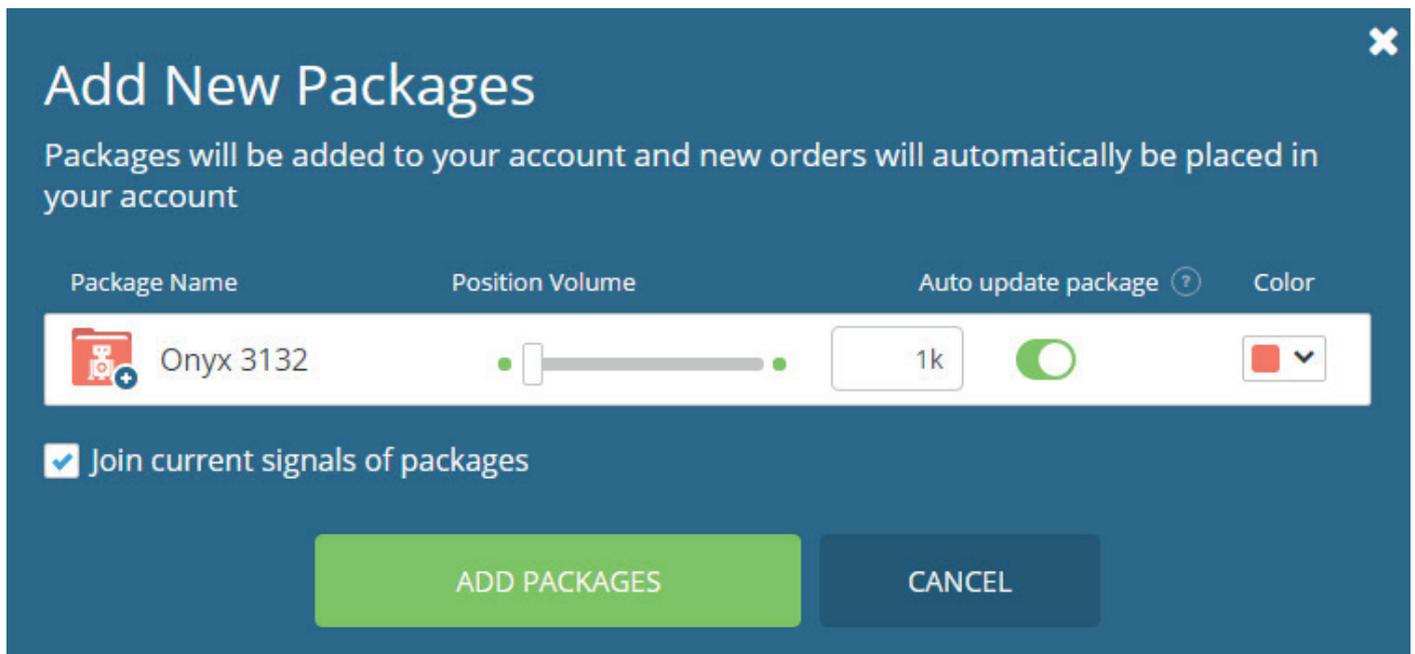
Password

LOGIN

Lost your password?

New to RoboX? Click here

After completing the sign-up\sign-in process, you will be forwarded to the following screen in order to setup your Package definitions:



Add New Packages

Packages will be added to your account and new orders will automatically be placed in your account

Package Name	Position Volume	Auto update package	Color
Onyx 3132	<input type="range"/>	1k <input checked="" type="checkbox"/>	<span style="color: red;">■</span> ▼

Join current signals of packages

ADD PACKAGES CANCEL

**Package name** – Package name.

**Position Volume** – Determines the trade amount that will be placed for every position opened by this package.

**Auto update package** – when active, this package will automatically update the strategies on each strategy refresh, keeping it up to date. When set to inactive, you will receive notifications each time a strategy sync is needed and will have to approve it.

**Color** – The color the package will appear on your dashboard.

**Join current signals of packages** – This will add you to all current open signals of the package, note that they will be executed on current market price and may vary from the expected performance due to this difference.

### Notes and Tips

- ☑ Existing users that encounter the wizard may skip it by clicking “LOGIN” in the left side of the header;
- ☑ You may change the answers on your questionnaire at any given time to see how the different preferences affect the results;
- ☑ Note to take into consideration the amount of packages you add and the number of strategies in each package when deciding the trading volume of each package.

## 3. LINK YOUR ACCOUNT TO YOUR BROKER ACCOUNT

Once you have completed the account initial setup of signing up and adding a package or more you will need to connect actual funds to the account to begin trading. The first step is connecting your RoboX user to your brokerage account. You will be alerted about this via a **red warning banner** notification that will appear on the upper left side of the screen. By clicking the notification you will be asked to input your broker credentials. If you do not have those contact the broker and they will provide you with the relevant ones or link your account automatically.



Packages summary

Please enter brokers credentials

✕

✉ Broker Username

🔒 Broker Password 👁

LINK TO BROKER

Don't have a broker account yet ? CREATE NOW!

After you have linked your account successfully you will be able to see your balance updates. In case you have yet to deposit, you can find the “Fund Account” option under the “Username drop down” (which will be extended on in the continuance of this User Guide. The “Fund Account” function will redirect you to the relevant broker site to fund the account. Depositing and withdrawing funds are done only directly from your broker.

## Notes and Tips

- ☑ In any future password changes on your broker account be sure to login to RoboX and re-link your user with the new password;
- ☑ You may also add more funds at any given time from the account menu under “Fund account”.

# 4. MY ACCOUNT PANEL

The “My Account” panel gives you an updated summary of your account finances. It constantly appears on the left side of the screen on all tabs. In low screen resolutions, tablets and mobile devices the panel can be found in the left panel menu as part of the navigation.

### My Account

---

Balance  
\$49,071.45

---

P/L  
\$-928.55 (-2%)

---

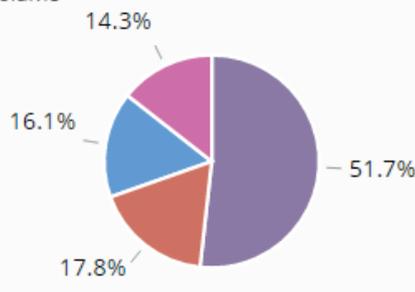
Current P/L \$-149.05	Equity \$48,922.40
Used Mr \$3,995.00 (8%)	Usble Mr \$44,927.40 (92%)

---

Trading Mode:  
🕒 Require Confirmation

---

Package distribution  
Package distribution is calculated based on number of strategies and package selected volume



■	Opal 7133 (51.7%)
■	Jargon 1134 (16.1%)
■	Jargon 1122 (17.8%)
■	Opal 1134 (14.3%)

---

+ FIND A PACKAGE

## Terms and Definitions

**Balance** – The amount of funds you have in your account at any moment. This information is derived from broker’s records and is displayed in your account currency. Please note – if you are trading with your broker account as well as the RoboX you will notice that your balance is up to date and calculated with both accounts positions.

**P/L** – Presents the profit your account made since the beginning, based on the balance as it was at the 1<sup>st</sup> of each month and the accumulated P/L.

**Current P/L** – Presents the profit your account makes at this moment, calculates the currently open positions.

**Equity** – The Equity field presents my account current balance with the profit or loss of the currently open positions.

**Used Mr** – This is the portion of your funds that is currently in use in the open positions.

**Usable Mr** – This is the portion of your funds that is currently not in use in the open positions, and as such is available for trading.

**Trading Mode** – The RoboX account allows users to trade in 3 different modes:

- **Automatically** – when you set the account to the “Automatically” mode, all trades that are sent by the packages you own will be opened and closed automatically for you;
- **Require confirmation** – on this mode, trades are not opened automatically, when your account will be set to this mode, you will be required to go into the “Require confirmation tab and confirm or deny opening the trades;



- **On Hold** – when your account is set on this mode, no new positions will be opened, but if you have open positions, they will receive closing signals. These modes are controlled from the header of the platform and reflected on the left account status bar.

**Package Distribution Pie** – The pie presents the package distribution allocation which is calculated based on the number of strategies and the package selected volume.

### Additional Functions

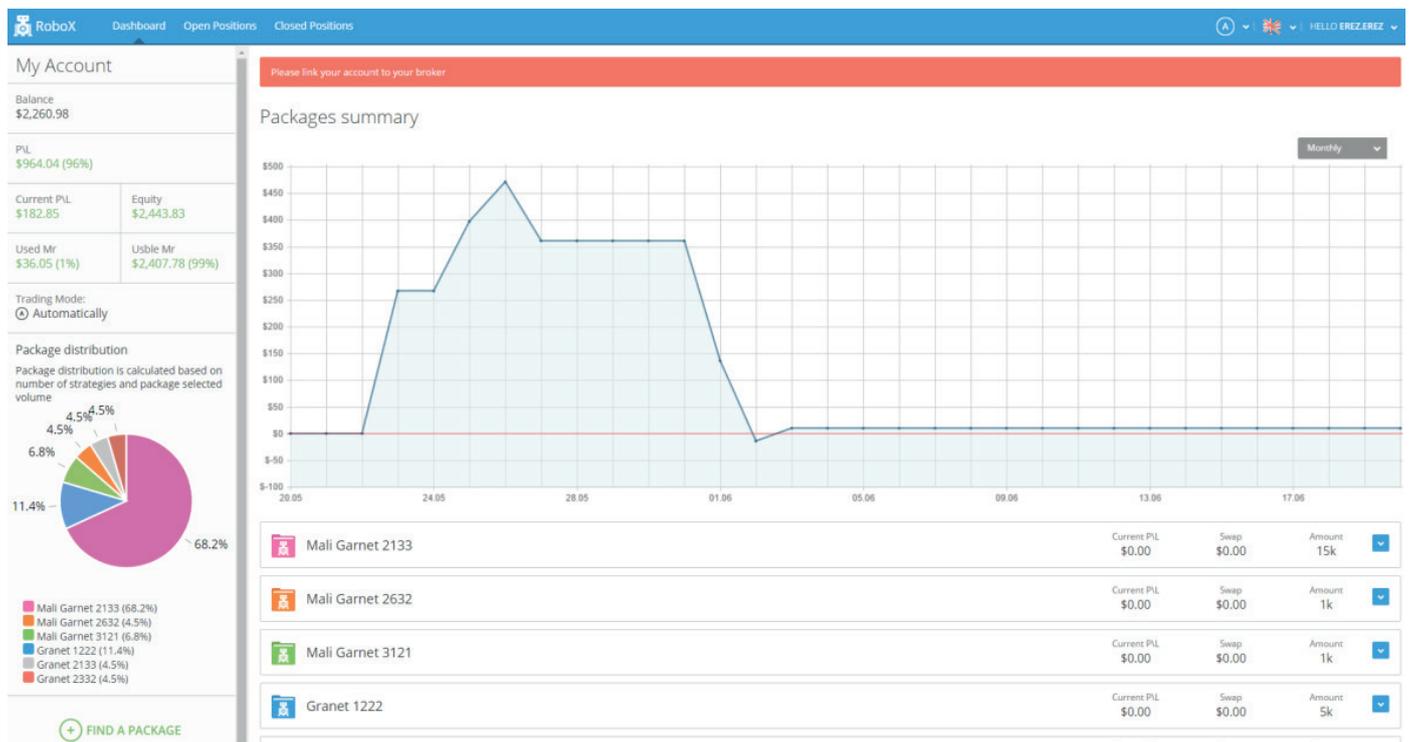
“FIND A PACKAGE” button also appears on this panel, by clicking on this button, you will be directed back to the wizard, where you can view and select more packages to add to your portfolio.

## 5. DASHBOARD

The dashboard is the main screen of the platform and it summarizes all the packages in your trading portfolio and their performance. You may view your balance changes in the graph area and you may change time intervals for your comfort (daily, weekly or monthly status).

Below the graph you may find a list of your current packages and their performance in the mentioned time frame. In the package information area you may find additional data of a specific package performance, trades, statistics and you may also modify or remove packages.

The dashboard will be the first place you see when you login, note the notification bar in the top of the window that will let you know of important actions to take or an event you should note in the account.



## Package Summary

### Graph

**Daily**  **Time frame controller** – this menu will help you change the graph performance to view your account progress today, this week or this month.

### Package List

Indicates the list of the packages that are currently active in your account.

### Package Information

**more\less info** – click this button on the right corner of each package to open the package area, this area displays the package description and the performance of the package inside your account.

 Granet 1222 Current P/L \$0.00    Swap \$0.00    Amount 5k

Granet 1222 package is an assembly of trading strategies that matches both user's preferences and the package smart rule. The rule contains a variety of trading indicators such as: APT (Average profit trade (in pips)) Pips (Total pips.) TotalTradeCount (amount of trades.) . The Granet 1222 Package can contain a variety of strategies. Granet 1222 contains maximum 1 strategies trading with Forex and back tested over the last Last 30 days , Last 6 months .



Strategies

Strategy Name	Symbol
 Home Runs	GBPAUD

**Monthly**  **Time frame drop down** – this function allows you to review your package results over a selected time-frame of your choice (Monthly, Weekly, and Daily).

**Strategies Tab** – holds the list of current trading strategies in this package and the symbol they are permitted to place trades for.

**Open Positions Tab** – holds the list of current open trades by this package in your account. The information provided on each trade:

- **Strategy name** – strategy that placed the trade;
- **Symbol** – the currency pair traded;
- **B\S** – indicates a Buy or Sell trade;
- **P\L** – the profit the trade would have accumulated assuming the last market price would have been realized;
- **Swap** – the swap rollover for the trade;

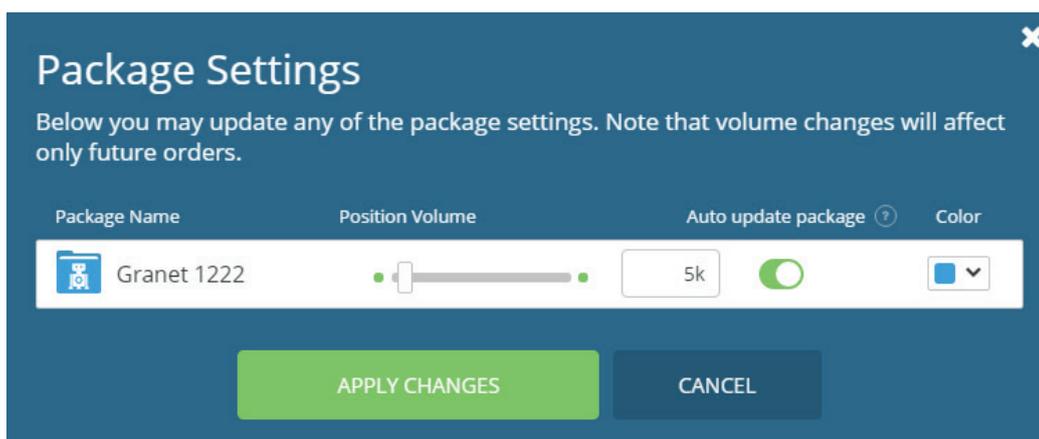
- **Open time** – the date and time trade was opened in the account.

**Closed Positions Tab** – holds the list of past trades in this package that are already closed. The information provided on each trade:

- **Strategy name** – strategy that placed the trade;
- **Symbol** – the currency pair traded;
- **B\S** – indicates a Buy or Sell trade;
- **P\L** – the profit or loss the trade made in the account;
- **Swap** – the swap rollover for the trade;
- **Open time** – the date and time trade was opened in the account;
- **Close time** – the date and time trade was closed in the account.

### Package Actions

 **MODIFY PACKAGE** – allows you to change one or more settings of a certain package. By clicking here, you will see following dialogue:



**Position Volume** – determines the trade amount that will be placed for every position opened by this package. This will not affect current open trades, only trades that will open from the time of the change forward.

 **Auto update package** – when active, this package will automatically update the strategies on each strategy refresh, keeping it up to date. When set to inactive, you will receive notifications each time a strategy sync is needed and will have to approve it. The message will appear on dashboard as shown below, simply click “sync now” and approve the dialogue that elaborates on the changes.

 **Color** – the color the package will appear on your dashboard. You may not switch to the same color as a different package.

 **REMOVE PACKAGE** – allows you to remove a package from portfolio and stop its trading. You may still find the package trades and history on “open positions” tab and “close positions” tab. By clicking you will receive a confirmation dialogue:

✕

## Remove Package?

Package will be removed from your trading portfolio and will no longer place orders in your account. If you choose to keep your positions open, they will close once strategies will close them.

Granet 1222

Close open positions

REMOVE PACKAGE

CANCEL

### Notes and Tips

- Only active packages appear on the dashboard. To see performance of packages you had in the past but removed or long term history of the account visit the “closed positions” tab;
- Note that changing a package to auto sync after it was off, will sync all current packages;
- It is highly recommended to sync the packages as soon as possible and approve changes to achieve the intended performance.

## 6. OPEN POSITIONS

Now that your account is connected to the broker and funded your packages will begin placing trades in your account. You may find all your open positions in the “open positions” tab.

RoboX Dashboard Unconfirmed Orders Open Positions Closed Positions
HELLO B110\_STAGE

#### My Account

Balance  
\$48,260.52

PL  
\$-1,640.36 (-3%)

Current PL  
\$-2,558.64

Equity  
\$45,701.88

Used Mr  
\$1,375.00 (3%)

Usble Mr  
\$44,326.88 (97%)

Trading Mode:  
 Require Confirmation

Package distribution  
Package distribution is calculated based on number of strategies and package selected volume

#### 5 Open Positions

Strategy Name	Symbol	B/S	PL	Swap	Amount	Open Time	
CurrencyTradingAdvisory	USDJPY	Buy	\$-575.41	\$2.46	10k	05/30/2016 11:28:57	<a href="#">Close position</a>
CurrencyTradingAdvisory	USDJPY	Buy	\$-575.49	\$2.46	10k	05/30/2016 11:28:52	<a href="#">Close position</a>
Y&P	EURCHF	Buy	\$-258.44	\$1.50	10k	05/30/2016 11:28:46	<a href="#">Close position</a>
CurrencyTradingAdvisory	USDJPY	Buy	\$-574.85	\$2.46	10k	05/30/2016 11:28:45	<a href="#">Close position</a>
CurrencyTradingAdvisory	USDJPY	Buy	\$-574.45	\$2.46	10k	05/30/2016 11:28:38	<a href="#">Close position</a>

[CLOSE ALL POSITIONS](#)
[EXPORT TO EXCEL](#)

### Terms and Definitions

**Strategy name** – strategy that placed the trade;

**Symbol** – the currency pair traded;

**B\S** – indicates a Buy or Sell trade;

**P\L** – the profit the trade would have accumulated assuming the last market price would have been realized;

**Swap** – the swap rollover for the trade;

**Amount** – the volume leveraged in this position;

**Open time** – the date and time the trade was opened on account.

### Additional Functions

**No Grouping**  **Positions grouping** – you may decide to see all your positions together (No Grouping), or aggregate them per package.

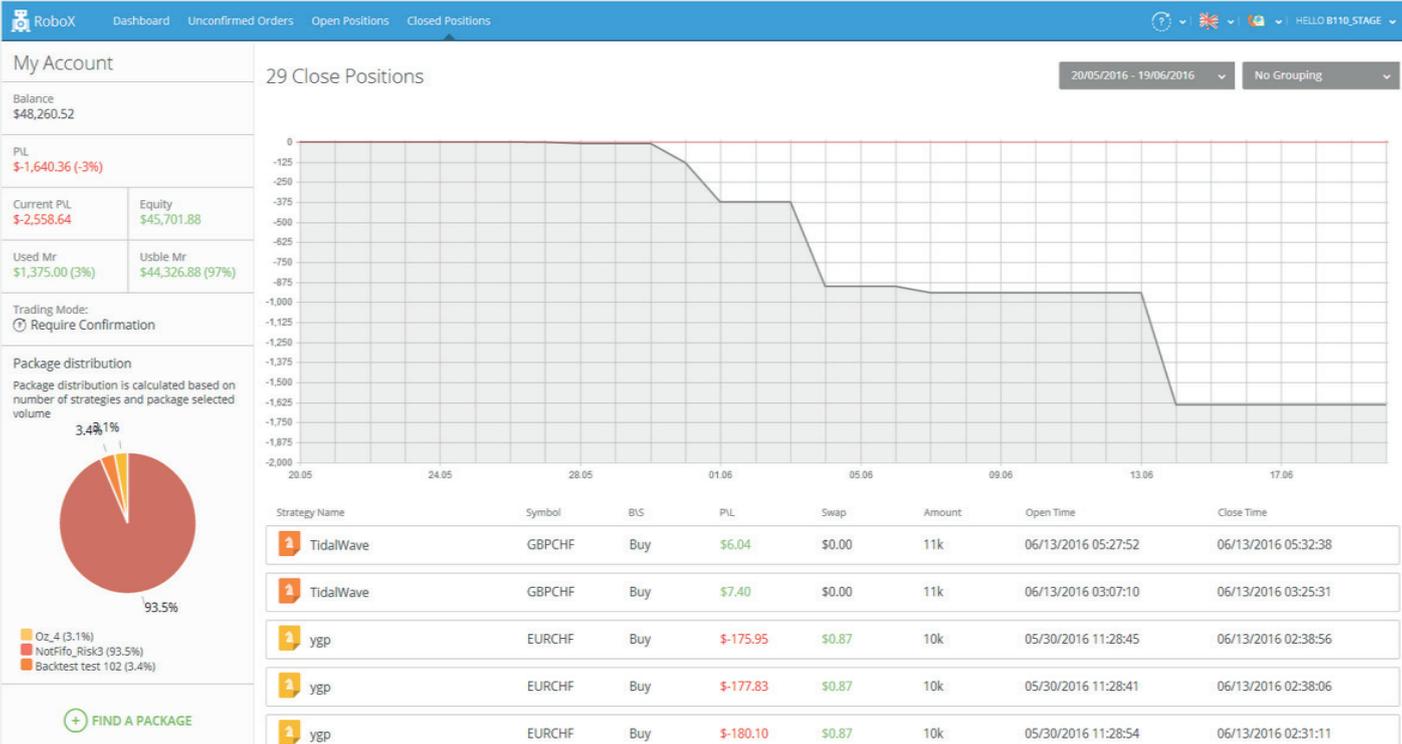
 **Close position** – by clicking this you will see the option to close a certain position. The position will close on market price and only in market hours. By clicking this icon on the entire package you can close all package positions at the same time.

 **CLOSE ALL POSITIONS** – close all positions in the account.

 **EXPORT TO EXCEL** – Export position list to an excel document.

## 7. CLOSED POSITIONS

You may find your entire trading history in this tab, simply choose the relevant date range on the menu in the right upper corner in the graph area. You may see the account performance displayed on the graph as well as the full list of trades.



**My Account**

Balance: \$48,260.52

P\L: \$-1,640.36 (-3%)

Current P\L: \$-2,558.64    Equity: \$45,701.88

Used Mr: \$1,375.00 (3%)    Usble Mr: \$44,326.88 (97%)

Trading Mode:  Require Confirmation

Package distribution: Package distribution is calculated based on number of strategies and package selected volume

- Oz\_4 (3.1%)
- NotRfo\_Risk3 (93.5%)
- Backtest test 102 (3.4%)

**29 Close Positions**    20/05/2016 - 19/06/2016    No Grouping

Strategy Name	Symbol	B\S	P\L	Swap	Amount	Open Time	Close Time
TidalWave	GBPCHF	Buy	\$6.04	\$0.00	11k	06/13/2016 05:27:52	06/13/2016 05:32:38
TidalWave	GBPCHF	Buy	\$7.40	\$0.00	11k	06/13/2016 03:07:10	06/13/2016 03:25:31
ygp	EURCHF	Buy	\$-175.95	\$0.87	10k	05/30/2016 11:28:45	06/13/2016 02:38:56
ygp	EURCHF	Buy	\$-177.83	\$0.87	10k	05/30/2016 11:28:41	06/13/2016 02:38:06
ygp	EURCHF	Buy	\$-180.10	\$0.87	10k	05/30/2016 11:28:54	06/13/2016 02:31:11

## Terms and Definitions

**Strategy name** – strategy that placed the trade;

**Symbol** – the currency pair traded;

**B\S** – indicates a Buy or Sell trade;

**P\L** – the profit the trade accumulated;

**Swap** – the swap rollover for the trade;

**Amount** – the volume leveraged in this position;

**Open time** – the date and time the trades was opened in the account;

**Close time** – the date and time the trades was closed in the account.

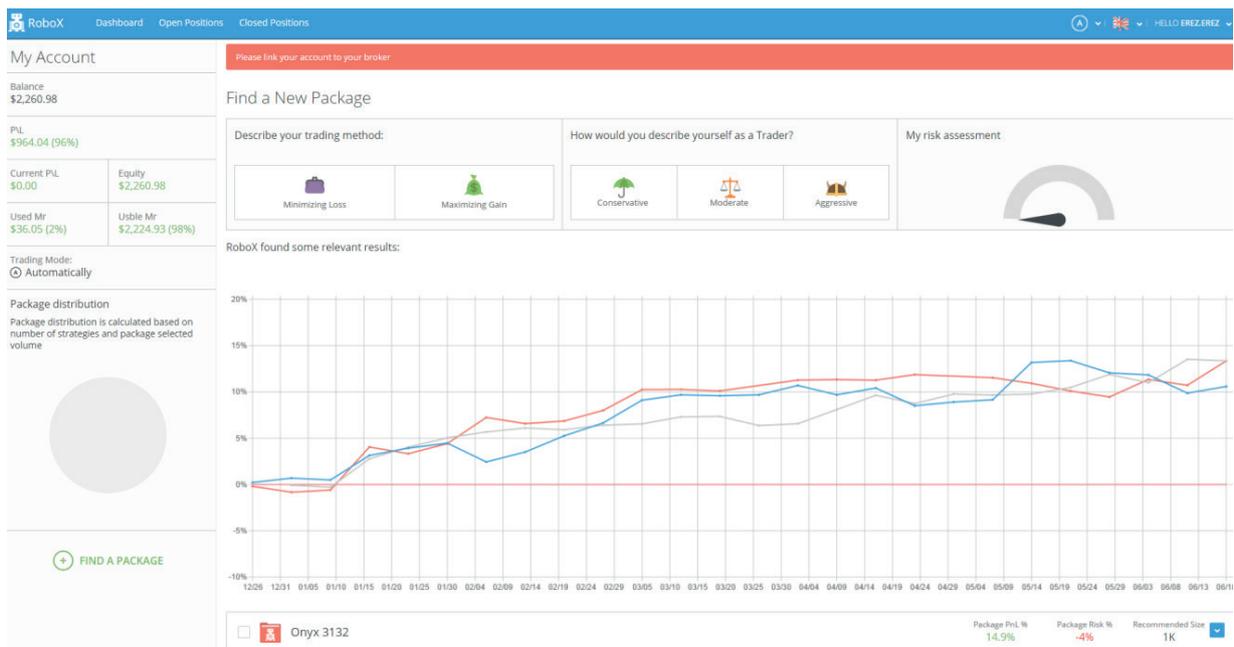
## Additional Functions

**Jan 1 2016 - Jan 12 2016**  **Date picker** – switch the date range of your results using the calendars in this menu.

**No Grouping**  **Positions grouping** – you may decide to see all your positions together (No Grouping), or aggregate them per package **Group by Package**

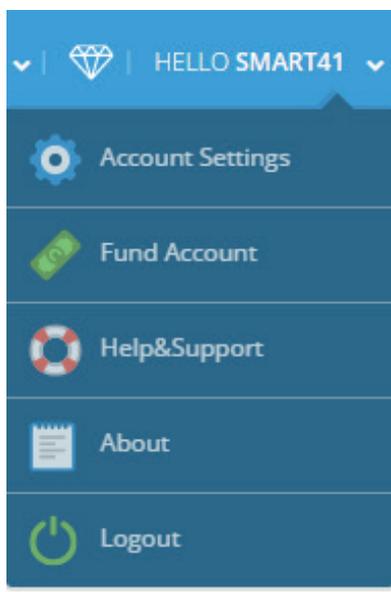
# 8. ADDING A NEW PACKAGE

If you wish to add a new package or replace one of your current packages simply click “FIND A PACKAGE” on the bottom left of the “My Account” panel (please see chapter 4). You will find a screen similar to the welcome wizard already containing the answers that you input last.



## 9. ACCOUNT MENU

The account menu helps you with the any settings or support you may need to utilize the platform.



### Terms and Definitions

**Account Settings** – this option will open a dialogue where you can change your display name, add another email address, change your password and control the notifications the platform sends you;

**Fund Account** – sends you to the broker funding site;

**Create Broker Account** – intended for clients who are new to trading and have yet to have any broker account. Clicking on this button will redirect you to the brokers “Account Opening” page;

**About** – opens the terms of use explanation – Disclaimer;

**Logout** – finishes this session.

### Additional Functions

 – use this menu in the header to change the platform language.

The currently supported languages in the RoboX platform are:

English

Japanese

Russian

Traditional Chinese

Simple Chinese

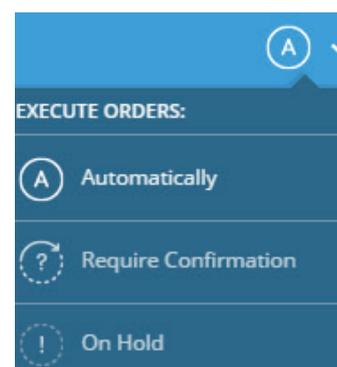
Spanish

Arabic

## 10. EXECUTION MODE

### 10.1 Execution mode selection

The RoboX provides three different modes of order execution. Automatic execution allows a fully automated execution, where the package places trades in your account according to the strategies’ signals. For users that would like more control over the account and the trading we offer a second solution of “confirmation required”, where the package will request approval before each and every trade. The third execution mode, “on hold” is for users that would like to cease any trading activity in the account. The packages would no longer place trades, but will send close signals to current open trades.



## Terms and Definitions

**Automatically** – this option will open trades automatically in your account.

**Require confirmation** – this option will open a new tab in your account of “unconfirmed orders”. Any new incoming trades by the strategies will be sent to this new tab and will not execute. You will receive a notification alerting you of pending orders. In this tab you must approve or deny any of the trades in order to execute them to actual trades in the account.

**On hold** – this blocks all new incoming trades on the account. Closing signals will be sent to open trades as normal. To be used for pausing all packages at once, without removing them.

## Notes and Tips

- Changing between “require confirmation” mode to “automatic” mode when you have pending orders will ask you whether you would like to approve or deny all pending orders;
- Changing to “on hold” mode when you have pending orders will automatically deny all pending orders;
- Using “Require confirmation” mode will cause a difference in intended performance due to the delay in open time of the trades;
- Signals that are closed by package before receiving approval will automatically disappear from your pending order list;
- Changing to “require confirmation” is only available during “Market Open” time.

## 10.2 “Require Confirmation” tab

**My Account**

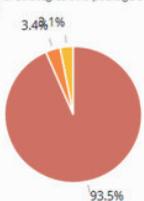
Balance  
\$48,260.52

PL  
\$-1,640.36 (-3%)

Current PL \$-2,558.57	Equity \$45,701.95
Used Mr \$1,375.00 (3%)	Usble Mr \$44,326.95 (97%)

Trading Mode:  
⊙ Require Confirmation

Package distribution  
Package distribution is calculated based on number of strategies and package selected volume



■ O2\_4 (3.1%)  
■ NotFifo\_Risk3 (93.5%)  
■ Backtest test 102 (3.4%)

[+ FIND A PACKAGE](#)

19 Orders to Review Group by Package ▾

NotFifo_Risk3	Positions 9
Backtest test 102	Positions 6
O2_4	Positions 4

APPROVE ALL ORDERS   
  DENY ALL ORDERS



**Symbol** – the symbol the package would like to trade;

**B\S** – the type of order the package is trying to open Buy\Sell;

**Amount** – the trade volume the package would trade;

 **APPROVE**  **DENY** – You need to either approve or deny the signal for the trade to execute;

 **APPROVE ALL ORDERS** – approves all current pending order of all packages;

 **DENY ALL ORDERS** – denies all current pending orders of all packages;

 **Group by Package** – groups orders according to packages.

## 11. CONTACT US!

We welcome any feedback ideas or questions you may have, you are more the welcome to contact us for any question of comment at: [support@amarkets.com](mailto:support@amarkets.com).

We would also warmly welcome you to browse through our Website: [www.Tradency.com](http://www.Tradency.com) for more information on RoboX or any of our featured products.