

CT Products user manual

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

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1. Getting started

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

Signing in

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

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

The screen

- The menu on the left groups the pages: Overview (results), Trading (pairs, strategies, penny stocks), Connections (brokers, AI, email) and Administration.
- The bar at the top shows whether you trade with practice money (**Paper trading**) or real money (**Live trading**), and whether the agent is on.
- Choose the language (English, Arabic, German, Persian, Portuguese, Chinese) and the colour theme at the top. Every page has a **Help** button for that page.

Your first hour, step by step

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

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

2. Dashboard

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

- **Account value:** the value of your broker accounts (only for users who may see all data).
- **Today** and **This month:** profit or loss of closed trades, in US dollars (Binance amounts are in USDT, worth one dollar).
- **Win rate, Open trades** and **AI checks today** with their cost.
- Charts: account value over time, wins and losses, daily results, results per strategy and per pair.

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

3. The AI agent page

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

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

4. Brokers (Connect Trader)

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

Binance (crypto)

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

Interactive Brokers (US stocks)

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

Exness (forex, gold, indices, crypto CFDs)

- Runs through MetaTrader 5 on the server. Enter the account number, the **trading** password and the exact server name (for example Exness-MT5Trial15).
- Standard account symbols end in m (XAUUSDm = gold). Only instruments priced in your account currency can be traded.

- Exness can use leverage within your limits (see Risk limits).

Tip: Pepperstone can be connected and tested; trading through it arrives in a later version.

5. AI (Connect LLM) and its cost

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

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

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

6. Pairs: what to trade

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

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

7. Strategies

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

- 1 **Strategy Title:** a name (text and numbers).
- 2 **Strategy For Capital:** the budget for this strategy. Trades are sized on it and its open trades never use more than this amount (empty = the whole account).
- 3 **Broker Name:** one or more brokers.
- 4 **Applicable for Pair:** type a ticker or name; the list shows the pairs of the chosen brokers (from your Pairs lists). Choose as many as you like.
- 5 **Trade Direction:** Buy, Short or Both.
- 6 **Profit Trail:** Yes - the agent trails the trade itself (stop to break-even at 1R, then one risk-unit behind the price) or as your story says; No - no trailing, the trade closes at its target, stop or exit rules.
- 7 **User Strategy Story Board:** in your own words, how you take the trade, the time interval (for example the 5-minute chart), all rules and parameters, and how to exit.

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

Your files are private to you.

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

Improving a strategy with the AI agent

- **Analyse past trades** (AI Agent Findings): the AI reads the strategy's closed trades, above all the stop-loss hits, and explains in three steps: Findings, Modification, Logic.
- **Trader Input:** ask a question or disagree; the AI answers with new findings, modification and logic. The whole conversation is kept.
- **Approve modification:** the strategy is updated and the old one is kept as history; **Roll back** restores the previous strategy.

Improving a strategy with backtests

- **Improve with backtest** (AI Agent Findings): the AI agent backtests the current rules on the last 90 days, proposes up to 3 improvements and backtests each one. The period is split: the first 70% to learn from and the last 30% as an unseen check. An idea is proposed only if it clearly beats the current rules on the learning part and is not worse on the unseen part. Step 4 of the slider, Backtest check, shows before and after.
- Analyse past trades also reads the strategy's latest backtest.
- **Let the AI agent improve this strategy by itself:** once a week, the same process; a change is applied automatically only while the strategy trades on paper (with real money it waits for your Approve). Only the rules change, never the risk limits. You get an email, and Roll back restores the previous rules.

Self-training towards a profit goal

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

Risk limits

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

Community strategies and ratings

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

Saving

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

8. The rule language

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

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

- Conditions compare two expressions with >, <, >=, <=, crosses_above or crosses_below.
- Values: open, high, low, close, volume; SMA20, SMA50, SMA200, EMA9, EMA21, RSI14, VOL20, ATR14, VWAP, BBU20, BBL20; name[n] means n candles ago.
- Functions: highest(x, n), lowest(x, n), avg(x, n), change(x, n), min(a, b), max(a, b), abs(a).
- In STOP, TARGET and TRAIL: entry, stop and price.
- Daily levels: DOPEN, DPREV, DHIGH, DLOW and DSD (daily standard deviation).

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

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

9. Backtest

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

- 1 Choose the strategy (only strategies with complete rules can be tested).
 - 2 Choose the pairs (up to 10; the strategy's own pairs are ticked) and the period (From and To, or 1 month to 1 year). Each timeframe has a longest period, for example 30 days of 1-minute candles or 3 years of 1-hour candles.
 - 3 Check the starting capital, the fee and the slippage, and click **Run backtest**. The page shows the progress and the result: net result, win rate, profit factor, largest drawdown, the account value over time, results per pair and every trade.
- Binance history comes from its public market data. IBKR history needs the IB Gateway running and logged in (with market data); Exness history needs MetaTrader 5 on the server logged in.
 - New trades fill at the next candle's open; if one candle touches both the stop and the target, the stop counts. AI confirmation isn't asked in a backtest.

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

10. Risk limits

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

- **Risk per trade:** sizes each trade so that hitting the stop loses this share of the balance (1% is common).
- **Largest position:** the most one trade may be worth, as a share of the balance.
- **Open trades at the same time, Open trades on the same pair, New trades per day.**
- **Daily loss limit:** no new trades for the rest of the day once reached.
- **Minimum reward-to-risk:** 2 means the target is at least twice as far as the stop.
- **Stop-loss distance:** refuses stops that are too close or too far.

The live guide

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

Recommended limits

Use recommended limits sets a careful starting point for the selected broker in one click: risk 1% per trade, largest position 10%, 3 open trades, 10 new trades a day, daily loss 3%, reward-to-risk 2, stop-loss 0.3% to 5% away, one open trade per pair.

Exness leverage

Set on Connections > Connect Trader > Exness, under **Leverage**:

- **Max leverage per trade:** one trade can be worth at most this many times the balance.
- **Max total exposure:** all open Exness trades together; it must be at least the per-trade leverage.
- **Margin buffer:** a new trade uses at most this share of the free margin; bigger trades are made smaller.

Example: balance 10,000 USD, risk 1% (100 USD), EURUSD stop 0.4% away: the position is about 25,000 USD (2.5 times leverage). If the stop is hit, about 100 USD is lost.

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

Self-healing

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

Suggested fixes for issues

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

Learn from losses

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

11. Trades: stops, targets and closing

- The stop-loss is placed at the broker the moment a trade opens, so it works even if the server is down. If it can't be placed, the trade is closed straight away.
- The target closes the trade when reached; TRAIL rules move the stop only in your favour.
- If the price jumps past the stop, the agent sells at market.
- **Close** on the AI agent page closes one trade within about 15 seconds; **Close all and stop** closes everything and turns the agent off.
- **Deleting**: the bin button deletes one agent decision or one closed trade permanently; **Delete all** (your password needed) deletes every decision, or every closed trade the page shows with its current filters. Open trades can't be deleted. Deleted trades disappear from every report and can't be brought back. Deleting closed trades needs the permission Delete closed trades (Admin has it).

12. Penny stocks

Trading > Penny stocks: settings on the left, the live scanner and trades on the right (Interactive Brokers, US exchanges).

- Filters: price range (for example under 1 USD), volume at least 10 times the 30-day average, move today, dollars traded, gap between buy and sell price. Optional: fresh news or a new SEC filing; stocks that just filed to sell new shares are skipped.
- Default strategy Volume Spike Momentum: buy on a break above the first minutes' high while above VWAP; sell short when a spike fails below VWAP and shares can be borrowed. Part profit at 1R with the stop at break-even, trailing stop, target 2R, everything closed before the market closes.
- Pattern Day Trader rule: under 25,000 USD, at most 3 day trades in 5 business days.

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

13. Market watch

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

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

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

14. Reports

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

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

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

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

15. Email notifications and My account

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

16. Users, roles and data

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

- Audit log: every sign-in and change, with who and when.

17. Chat and support

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

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

18. Subscription and support

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

19. When something is wrong

- **No trades**: read Why no trades? on the AI agent page; each red line says what to fix.
- **Position too small**: the balance or limits allow less than the broker's minimum; raise Largest position or risk per trade, top up, or (Exness) check the leverage limits.
- **Stop-loss closer than your minimum**: the setup's stop is too tight for your limits; it is a protection, not an error.
- **Reward-to-risk below your minimum**: the target is too close compared with the stop.
- **Broker didn't fill** (IBKR): often a missing market-data subscription or a live session open elsewhere.
- **MT5 isn't answering** (Exness): check that MT5 on the server is logged in to your Exness server and Algo Trading is on.
- **Live trading is locked**: live trading for that broker isn't enabled in this version; use paper.

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

20. Glossary

- **Paper / live**: practice money / real money.
- **Stop-loss**: the price where a losing trade is closed. **Target**: where a winning trade is closed.

- **R**: the distance from entry to stop; 2R means twice that distance in profit.
- **Short**: selling first and buying back later, to profit when the price falls.
- **Leverage**: a position larger than the balance; the risk stays set by the stop-loss.
- **VWAP**: the day's volume-weighted average price. **SMA / EMA**: simple / exponential moving averages.
- **RSI**: momentum from 0 to 100. **Timeframe**: the candle length the rules are checked on.