



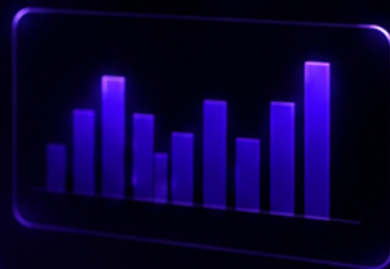
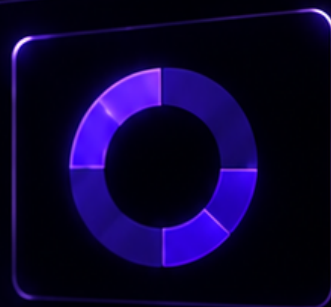
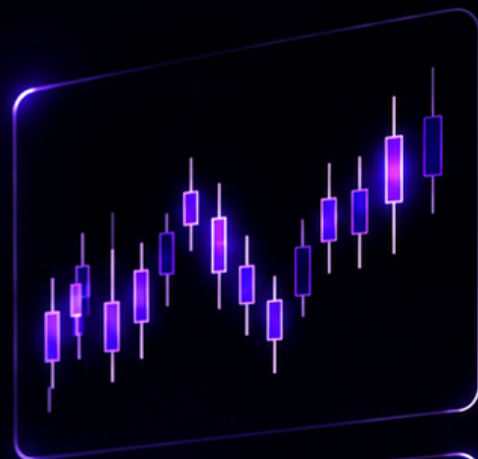
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**AI & Algo
Conclave**

The Trader's Toolkit

Research • Analyse • Trade



What’s in this toolkit

This toolkit is your go-to guide for using AI models in your trading and investments.

Print it and keep it next to the terminal or fill it in digitally — either works. What matters is that it gets filled in on the day, not reconstructed from memory at the end of the month.

Three sheets do most of the work: the **trading plan** (sheet 02), because a plan you have not written down is a mood; the **trade log** (sheet 05), because it is the raw material for every AI review you will ever run; and the **mistake tracker** (sheet 13), because the same three errors will account for most of what you lose.

WHICH SHEET FEEDS WHICH PROMPT

- Trade log (05) Cheat Sheet section 04 — the trading performance dashboard, and the 50-trade journal analysis.
- Weekly review (07) Cheat Sheet section 09 — weekend portfolio review workflow
- Research worksheet (10) Cheat Sheet section 05 — the ten research prompts, then the investment thesis
- Investment journal (11) "Which of my assumptions proved correct, which proved wrong, and what does that say about my judgement?"
- Watchlist (12) "Rank these companies by investment quality, growth potential, valuation and risk." Mistake tracker (13) "Find the recurring pattern across these errors and tell me the one rule that would prevent most of them."

Trade log (05)	Cheat Sheet section 04 — the trading performance dashboard, and the 50-trade journal analysis
Weekly review (07)	Cheat Sheet section 09 — weekend portfolio review workflow
Research worksheet (10)	Cheat Sheet section 05 — the ten research prompts, then the investment thesis
Investment journal (11)	"Which of my assumptions proved correct, which proved wrong, and what does that say about my judgement?"
Watchlist (12)	"Rank these companies by investment quality, growth potential, valuation and risk."
Mistake tracker (13)	"Find the recurring pattern across these errors and tell me the one rule that would prevent most of them."

ONE RULE ABOUT THE EMOTION COLUMN

Sheet 05 has a column for what you were feeling at entry. It is the only column no broker export can give you, and it is where almost every pattern worth finding lives. Write it honestly or leave the sheet blank. A flattering log is worse than none, because it teaches you the wrong lesson with confidence.

If you have connected ArihantPlus to your AI, start at **sheet 00** instead. The prompts there pull your trades, holdings and P&L straight into the data sheets, so you only fill in the columns a broker feed cannot know — the setup, the stop you actually used, and what you were feeling.

Sheets are numbered so you can reprint just the ones you use. The trade log and the post-trade review are the two worth printing in bulk.

00 · Let the MCP fill this in

Connect ArihantPlus to your AI once (AI Cheat Sheet, section 02) and half this workbook fills itself. Each prompt below states which sheet it feeds and which columns it deliberately leaves blank — those are the ones only you can answer.

FILLS SHEET 05 · TRADE LOG

Pull my closed trades from [1 April] to [30 April] and return them as a table with exactly these columns, in this order:

date, instrument, setup, long/short, entry, exit, stop, target, quantity, P&L, R

Fill only the columns the data actually supports. Leave setup, stop, target and R blank — I will complete those by hand. Sort oldest first. Do not estimate, round or infer any figure I have not given you, and list any trade you could not fully resolve separately at the end.

The four blank columns are the point. Setup and emotion are yours; stop and target reveal whether you actually had a plan. Everything else is transcription the machine should do.

FILLS SHEET 08 · MONTHLY PERFORMANCE SUMMARY

From my closed trades for [month], compute and show as a single table: total trades, winners, losers, win rate, average win, average loss, largest win, largest loss, average R, profit factor, expectancy per trade, and maximum drawdown.

Exclude open positions entirely and say so. Mark any metric the data cannot support as unavailable rather than estimating it. Show the formula you used for profit factor and expectancy so I can check them.

FILLS SHEET 09 · PORTFOLIO REVIEW

Pull my holdings and fill this table: holding, sector, quantity, average buy price, current price, weight % of portfolio.

Then flag every single position above [10]% of the portfolio and every sector above [25]%. List the flags as plain sentences after the table. Do not recommend anything yet.

FILLS SHEET 07 · WEEKLY REVIEW

Using my positions and P&L for the week ending [date], give me only: portfolio return this week, best performer, worst performer, realised P&L, and any position now more than [8]% away from my average buy price.

Five lines. No commentary, no predictions.

THE ONE MOST PEOPLE NEVER RUN

Sheet 03 is only worth filling in if something checks it. This prompt turns a page of good intentions into a live audit — run it before the open, not after a bad afternoon.

CHECKS SHEET 03 · RISK RULES, AGAINST LIVE POSITIONS

Here are my risk rules: [paste your filled sheet 03].

Using my current funds, open positions and today's realised P&L, tell me whether I am inside each rule right now. Answer rule by rule with INSIDE or BREACH, and for every breach state the actual number against the limit.

If today's realised loss has already passed my daily limit, say that first, before anything else.

BEFORE ENTRY · POSITION SIZING

My capital is [₹X] and I risk [0.5]% per trade. I am looking at [instrument] with entry [price] and stop [price].

Give me the quantity, rounded down to whole lots, and the exact rupee amount at risk if the stop is hit. Then check that against my maximum quantity per order of [Y] and tell me which of the two limits binds.

If the stop distance makes the position smaller than one lot, say so and stop – do not suggest a wider stop.

That last sentence matters. Asked to make a trade fit, a model will happily widen your stop rather than tell you the trade does not fit.

FILLS SHEET 13 · MISTAKE TRACKER, FROM THE LOG

Here is my trade log and my written rules: [attach sheet 05 and sheet 03].

For every trade that broke one of my own rules, give me a row: date, what I did, which rule it broke, and what it cost in rupees and in R. Only trades where the breach is visible in the data – do not guess at intent.

Then tell me which single rule I break most often.

HOUSEKEEPING · BEFORE ANY REVIEW

Compare my broker positions and holdings against my trade log: [attach sheet 05].

List anything that appears in one and not the other, any quantity that does not match, and any open position I have no record of. The broker is the source of truth; my sheet is not.

TWO HABITS THAT KEEP THESE HONEST

Ask for blanks, not guesses. Every prompt here tells the model what to leave empty. Without that instruction it will fill a column plausibly, and a plausible number in a journal is worse than an empty cell.

Spot-check three rows.

Open the app, pick three trades from what it returned, and verify them by eye.

Do this every month, not just for the first time.

01 · Building an Algo: The Seven Prompts

From idea to a safer, testable trading system — one step at a time. Start your Algo Trading Journey here.

Building an algo isn't just about creating a trading strategy. A robust algo needs reliable market data, clearly defined risk controls, safe order execution, honest backtesting, and rigorous testing before it goes live.

These seven prompts guide you through that process in the right sequence:

set the rules → build the infrastructure → connect market data → establish risk controls → add a kill switch → backtest honestly → challenge the results.

The principle is simple: build the safety and foundation first, then build the strategy.

How to use these prompts

Run the prompts **in order** when starting a new algo project. You can paste the **House Rules** at the beginning of every AI session—or save them as your project's standing instructions—so the AI follows the same safety and development principles throughout.

01 · HOUSE RULES

You are helping me build a personal trading terminal. The following rules govern how you design, code, test, and handle every component of this project.

- Stack: Python 3.11+, [BROKER] API, SQLite for storage, [Streamlit] for the UI.
 - Never place a live order in any code you write unless I have written the words "live mode" in that same message. Every order function defaults to paper.
 - Every function that touches money takes an explicit `dry_run: bool = True` argument.
 - All credentials come from `.env` via `os.environ`. Never hardcode, print or log a key.
 - Before writing code for a new component, show me a five-line plan and wait.
 - Write to files. Do not dump 300 lines of code into the chat.
 - After each component, tell me the three most likely ways it fails during live hours.
- Confirm you have understood, then wait for my first task.

Watch for It should confirm and stop. If it starts building, the rules didn't land — restate and try again.

Then, start by defining the foundation of your trading terminal before writing any application code

02 · PROJECT SETUP

I want to build a personal trading terminal for Indian markets.

Broker [BROKER],
instruments [NIFTY index and weekly options], timeframe [1-minute], style [intraday and rule-based].

Do not write application code yet. Give me a folder and file structure with one line per file, the order I should build them in and why, and which parts I can change without touching code.

Then set up credentials only: a `.env.example` listing the variable names with empty values, a config loader that fails at startup naming any specific missing variable, and a `.gitignore` excluding `.env`, the database file and all logs.

Watch for A build order that puts risk and logging early. If it wants to build strategies first, push back.

03 • CONNECT AND STREAM

Write the [BROKER] connection layer, both halves.

REST: authenticate from my config loader; expose get_quote, get_positions, get_funds and get_order_book; retry twice with exponential backoff; raise a clear custom exception on auth failure rather than returning None; log every request and response to a rotating file with credentials redacted.

Streaming: subscribe to instrument tokens I pass in; reconnect automatically with exponential backoff, logging every disconnect with a timestamp; write ticks to an in-memory buffer other parts of the app can read without blocking; print a heartbeat every 30 seconds showing ticks per second; and expose is_stale(), returning True when no tick has arrived for [10] seconds.

Before writing any of it, list the exact endpoints, parameter names and response shapes you are assuming. I will check them against the official docs.

Watch for That endpoint list, every single time — it is the most reliable place for an AI to invent something plausible that does not exist. And the reconnect logic: a feed that dies silently at 2 PM while your strategy keeps trading on a frozen last price is the worst failure mode in this document.

04 • RISK CONFIG AND GATE

Before the first strategy, and before the order manager.
Two things, in this order.

First, a risk configuration file in [YAML] I can edit without touching code: max loss per day in rupees, max loss per trade, max open positions, max quantity per order, max total exposure, allowed instruments, allowed trading window as start and end times, and a global enabled flag. Write a loader that validates every value at startup and refuses to start the app if anything is missing, negative or nonsensical.

Second, a RiskGate class every order must pass through before reaching the broker. It checks, in this order, stopping at the first failure: is trading enabled; are we inside the time window; is the feed fresh; would this order breach quantity, exposure or position limits; has today's realised loss already hit the limit. It returns APPROVED, or REJECTED naming the specific failing check.

Strategy code must read the config but never write it, and nothing in my codebase must be able to call the broker's order function directly. Show me how you enforce both structurally.

Watch for The word "structurally" — "by convention" is not an answer. And check the ordering: feed staleness has to come before position limits, because a stale feed makes every other number wrong.

05 • KILL SWITCH

Write a kill switch. It triggers three ways: I click the button, the daily loss limit is reached, or the feed has been stale for [30] seconds.

When triggered it must stop all strategies generating new signals, cancel all open orders, square off open positions only if square_off=True is passed, write a full state dump to a timestamped file, and set a flag preventing anything restarting until

I manually clear it.

Make it callable from the command line too, for when the UI is frozen. Show me the exact command.

Watch for The command-line path. Write it on a sticky note and put it on your monitor.

06 · AN HONEST BACKTEST

Build a backtest engine with these non-negotiables: bars processed strictly in order, with no access to a bar it has not reached; entries filling at the open of the next bar, never the signal bar's close; [X] basis points of slippage plus my real brokerage, STT and exchange charges on both legs; and for options, no fill where that bar's historical volume was zero.

Output total return, maximum drawdown, win rate, average win and loss, profit factor, trade count, the equity curve and the full trade list.

Then run it walk-forward: [6]-month in-sample and [2]-month out-of-sample blocks rolling forward, parameters optimised on in-sample only and applied unchanged to the next out-of-sample block, reported block by block.

If out-of-sample is dramatically worse, say so in one sentence at the top before showing me anything else.

Watch for the in-sample versus out-of-sample gap. That gap is the strategy telling you it memorized rather than learned.

07 · RED-TEAM YOUR OWN RESULTS

Run immediately after any backtest that looks good. Especially the ones you like. Here are my backtest results and the strategy code: [paste both].

Act as a sceptical reviewer whose only job is to find the reason these results will not survive live trading.

Check for lookahead bias in the indicators or the fill logic; whether any parameter was chosen by looking at the same data it is tested on; how many parameters the strategy has relative to the number of trades; whether the result depends on a small number of exceptional days; whether it survives shifting every entry forward by one bar; and whether it survives a 50% increase in assumed slippage.

For each issue, tell me how to test whether it is real.
Do not reassure me. Do not soften your findings.

Watch for AI made generating 200 strategy variants free. That is the new risk, and this prompt is the only defense against it.

BONUS · THE ERROR PROMPT THAT ACTUALLY WORKS

[Paste the full traceback, not a summary of it.]

Context: this happened while [what you were doing], in [file], during [live market hours / a backtest / startup]. It [happens every time / happened once].
Relevant code: [paste].

Before fixing anything, tell me what you believe the actual cause is and how

confident you are. If you are guessing, say so, and tell me exactly what to log to find out. Do not rewrite unrelated code while you are in there.

Improve your Trading with MCP Prompts –

AI is your friend and your personal trading coach provided you know how to use AI to your advantage. To get the best possible results, all you need to do is – build some quality data set for yourself and then AI does the rest for you.

You can then connect any AI model via the MCP and ask the model to review, monitor & even execute trades on your behalf.

Let's start your AI powered Trading Journey and here's what you need to create.

02 · Trading plan

One page. If you cannot fill this in, you do not have a plan yet — you have a set of opinions.

What is a Trade Plan?

A trade plan is a set of rules you decide *before* you enter a trade, so decisions are based on logic — not emotion.

Key Elements

- **Entry point** – the price at which you'll buy/sell, and the reason (signal) behind it
- **Position size** – how much money you're putting in, so one trade can't hurt you too badly
- **Stop-loss** – the price where you'll exit if the trade goes wrong (limits your loss)
- **Target price** – the price where you'll book profit if the trade goes right
- **Risk-reward ratio** – how much you're risking vs. how much you stand to gain

Why It Matters

- Removes emotional decision-making (fear/greed) from trading
- Keeps you disciplined — you follow the plan instead of reacting in the moment
- Helps you cut losses early and avoid holding on too long

Simple analogy: It's like planning your travel route and your "turn back" point *before* you start the journey — not deciding while you're already lost.

Trade Plan Inputs

Here's what a trade plan looks like.

Note: A trade plan is highly personal — it needs to be specific to you as a trader. The idea is to be honest with yourself, observe your own trading patterns and emotions, and only then draft your plan around them.

Every solid trade plan rests on 4 pillars:

1. **Trading Rules** – the ground rules that define how you trade
2. **Risk Management** – how much you're willing to risk on any given trade
3. **Trade Logs** – journaling your trades as you make them
4. **Post-Trade Analysis** – reviewing your trades to assess and refine your plan

Trading Plan – The Blueprint

TIMEFRAMES I TRADE

HOURS I AM ACTUALLY AT THE SCREEN

CAPITAL I AM WILLING TO LOSE LEARNING

Name each one. If you cannot name it, you cannot review it.

My edge, in two sentences

PLAN WRITTEN ON

NEXT SCHEDULED REVIEW OF THIS PLAN

03 · Risk rules

Fill these in once, in ink, when the market is closed and you are calm. Then treat them as fixed until the next scheduled plan review.

Maximum risk per trade (% of capital)	
Maximum risk per trade (₹)	
Maximum loss per day (₹)	
Maximum loss per week (₹)	
Maximum open positions at once	
Maximum exposure to one stock (%)	
Maximum exposure to one sector (%)	
Maximum quantity / lots per order	
Trading window (start – end)	
Instruments I am allowed to trade	
What I do after two losing days in a row	
What I do after hitting the daily loss limit	

THE DAILY LOSS LIMIT TEST

The number above is correct only if you would be willing to lose it today, twice , without changing how you behave tomorrow. If reading it makes you flinch, it is too big — halve it and write the smaller number.

Position sizing, worked once so you never do it under pressure

THE ONLY FORMULA YOU NEED

Quantity = (Capital × Risk % per trade) ÷ (Entry price – Stop-loss price)

Then round DOWN to whole lots. Always down.

MY CAPITAL × RISK % =

TYPICAL STOP DISTANCE FOR MY SETUP =

THEREFORE, MY TYPICAL SIZE =

MY MAXIMUM SIZE, WHATEVER THE SETUP =

04 · Pre-trade checklist

Nine questions before entry. Any “no” is a reason to stand down, not a reason to think harder. Print several.

What is the Pre-trade checklist?

A set of actions that helps you follow your trading plan. Keeps you accountable and helps you trade beyond your current emotional state.

Here's a checklist that you should answer before you take the trade

- ☐ Is the trend clear on my trading timeframe?
- ☐ Does this trade fit one of the setups named in my plan?
- ☐ Have I checked upcoming news, results and events for this instrument?
- ☐ Is my stop-loss defined, in price, before I enter?
- ☐ Is the risk-reward at least as good as my minimum?
- ☐ Is my position size within the rules on sheet 03?
- ☐ Am I inside my trading window?
- ☐ Am I entering because of the setup, or because I am bored, angry, or afraid of missing out?
- ☐ If this trade goes to my stop, will I be fine? Genuinely?

Today's numbers, before the open

LOSS BUDGET REMAINING TODAY

OPEN POSITIONS AND THEIR CURRENT STOPS

EVENTS TODAY

My own state, before the open

SLEPT WELL? EATEN? (YES / NO)

CARRYING ANYTHING FROM YESTERDAY'S SESSION?

ON A SCALE OF 1–5, HOW CALM AM I?

STANDING DOWN IS A DECISION, NOT A FAILURE

Log the trades you did not take, and why, in the notes column of sheet 05.

Over a quarter, the list of avoided trades tells you as much about your judgement as the list of executed ones — and an AI review can read both.

05 · Trade log

One row per trade, filled the same day. This is the sheet every AI performance review is built from — sparse rows produce a sparse review.

Date	Instrument	Setup	L/S	Entry	Exit	Stop	Target	Qty	P&L (₹)	R	Emotion at entry	Lesson / note

R = profit or loss divided by the amount you risked. It is the only column that lets you compare a ₹500 trade with a ₹50,000 one, and the one most people leave blank.

05 · Trade log CONTINUED — REPRINT AS NEEDED

[illegible]

06 · Post-trade review

Two per page. Fill one for every trade that lost money, and for every winner where you broke a rule and got away with it.

INSTRUMENT AND DATE

RESULT (₹ / R)

DID I FOLLOW MY PLAN? WHERE EXACTLY DID I DEVIATE?

WHAT WENT WELL

WHAT I GOT WRONG — EXECUTION, NOT OUTCOME

THE ONE THING I WILL DO DIFFERENTLY NEXT TIME

INSTRUMENT AND DATE

RESULT (₹ / R)

DID I FOLLOW MY PLAN? WHERE EXACTLY DID I DEVIATE?

WHAT WENT WELL

WHAT I GOT WRONG — EXECUTION, NOT OUTCOME

THE ONE THING I WILL DO DIFFERENTLY NEXT TIME

OUTCOME IS NOT EVIDENCE

A profitable trade taken outside your rules is a loss you have not paid for yet. Review it exactly as harshly as a losing one, or the habit survives.

07 · Weekly review

Same day, same nine lines, every week. Then attach it and ask for the three highest-priority actions.

WEEK ENDING

TRADES TAKEN / TRADES AVOIDED

Portfolio return this week	
Best performer, and why	
Worst performer, and why	
New risks that appeared this week	
Results and events next week	
Positions to review	
Rebalancing required?	
Cash allocation	

Three actions for next week

What I did this week that I do not want to repeat

PROMPT TO RUN WITH THIS SHEET ATTACHED

Review my weekly update and recommend the three highest-priority actions for next week. Rank them by how much they change my risk, not by how easy they are. Then tell me which of my stated reasons look like justifications after the fact.

08 · Monthly performance summary

Compute these from sheet 05 at the end of every month. Calculate the figures manually once to understand how they work; after that, use the sheet 00 MCP prompt to populate the metrics supported by your broker data and complete the judgement-based fields yourself.

MONTH

STARTING CAPITAL

CLOSING CAPITAL

Total trades	
Winners / losers	
Win rate (%)	
Average win (₹)	
Average loss (₹)	
Largest win / largest loss	
Average R per trade	
Profit factor (gross profit ÷ gross loss)	
Expectancy per trade (₹)	
Maximum drawdown (₹ / %)	
Best setup this month	
Worst setup this month	
Days I broke a rule	

THE TWO FORMULAS WORTH MEMORISING

Profit factor = total of all wins ÷ total of all losses (below 1.0 = losing)

Expectancy = (win rate × average win) – (loss rate × average loss)

This is what one average trade is worth. If it is negative, trading more often makes things worse, not better.

What is working

What is hurting performance

One change for next month — one, not five

Note: You can adapt this format for investing as well as trading. Here's how to get started.

09 · Portfolio review

For investments rather than trades. Fill it before you run the portfolio X-ray prompt, so you can compare your read against the model's.

Holding	Sector	Qty	Avg buy	Current	Weight %	My view	Action

LARGEST SINGLE-STOCK WEIGHT

LARGEST SECTOR WEIGHT

The holding I would cut first if forced to cut one — and why I have not

10 · Stock research worksheet

Complete this before you buy. If you cannot answer a row, you are not ready — that is the whole purpose of the sheet.

COMPANY

DATE OF RESEARCH

What does the company do, in one sentence?	
How does it make money?	
Competitive advantage — and what erodes it	
Industry outlook	
Revenue growth (5 yr)	
Profit growth (5 yr)	
Margins and their direction	
ROE / ROCE	
Debt position	
Cash flow quality	
Valuation vs peers and vs its own history	
Management and capital allocation	
The three biggest risks	
What would make me sell	

Investment thesis, in three sentences

FINAL DECISION

TARGET HOLDING PERIOD

POSITION SIZE

11 • Investment journal

One block per buy. This is the record your future self will judge you against — and the only honest input for an AI review of your judgement.

COMPANY

PURCHASE DATE AND PRICE

WHY I AM BUYING — THESIS IN MY OWN WORDS

WHAT HAS TO GO RIGHT (GROWTH DRIVERS)

WHAT COULD GO WRONG (KEY RISKS)

MY VALUATION OPINION

PLANNED HOLDING PERIOD

EXIT CONDITIONS — THESIS BROKEN, NOT PRICE FALLEN

WHICH ASSUMPTIONS PROVED CORRECT

WHICH PROVED WRONG

WAS I RIGHT FOR THE REASONS I THOUGHT, OR LUCKY?

12 · Watchlist

Companies you are waiting on, with the trigger written down in advance. A watchlist without triggers is a wish list.

Company	Sector	Trend	Support	Resistance	Trigger to act	Notes

PROMPT TO RUN WITH THIS SHEET ATTACHED

Rank these companies by investment quality, growth potential, valuation and risk.
Then tell me which two I should remove from the list entirely, and why.

13 · Mistake tracker

The highest-return sheet in this toolkit. Most traders lose to the same three errors on repeat; this is how you find out which three are yours.

Date	What I did	Which rule it broke	What it cost (₹ / R)	Trigger — what set it off

At month end: the three that keep repeating

PROMPT TO RUN WITH THIS SHEET ATTACHED

Here is my mistake log. Find the recurring pattern across these errors, tell me the single rule that would have prevented the most damage, and tell me what that rule costs me in missed opportunity. Do not soften your findings.

14 · Before you automate

For anyone who leaves the conclave and starts building. Twelve items. If you cannot tick all twelve, you are not ready, and no amount of backtested return changes that.

- ☐ The risk config loads, and a bad value stops the app from starting.
- ☐ I have triggered the kill switch on purpose, during market hours, in paper mode.
- ☐ I know the command-line kill switch command by heart.
- ☐ The mode indicator (PAPER / LIVE) is visible from across the room.
- ☐ I have run at least 20 trading days in paper mode with the exact code I intend to run live.
- ☐ I have compared paper fills against what the live market actually did in the same minutes.
- ☐ The backtest survived a red-team review and walk-forward validation.
- ☐ My first live size is one lot, and the date I am allowed to increase it is written down.
- ☐ My daily loss limit is a number I would be willing to lose today, twice.
- ☐ Reconciliation is running, and I have tested that it catches a deliberate mismatch.
- ☐ My .env is not in my git history — I checked the history, not just the current state.
- ☐ I have confirmed my setup against current SEBI and exchange rules with the broker's compliance team.

ALL TWELVE TICKED ON

FIRST LIVE TRADE DATE

The prompts behind each of these live in section 07 of the AI Cheat Sheet.

15 · Quarterly self-review

Once a quarter, four questions. Answer them before you look at your P&L, then again after.

WHAT DID I BELIEVE THREE MONTHS AGO THAT I NO LONGER BELIEVE?

WHICH OF MY RULES DID I BREAK MOST OFTEN, AND WHAT WAS I FEELING EACH TIME?

WHAT AM I DOING PURELY OUT OF HABIT, WITH NO EVIDENCE IT HELPS?

IF I COULD ONLY KEEP ONE SETUP FOR THE NEXT QUARTER, WHICH ONE, AND WHY THAT ONE?

THEN, AND ONLY THEN

Attach three months of sheet 05 and ask: "Review my last quarter of trades and prepare a performance report: win rate, average risk-reward, common mistakes, strongest setups and an action plan for next month." Compare its answers with the four you just wrote. Where the two disagree is where your blind spot is.

16 · Bonus Resource – Where to find Strategy Ideas

Finding new strategies could be a challenge. Especially when the markets are dynamic and ever changing. Here are some resources that are ranked by signal-to-noise, which is not the same as ranked by popularity. Research paper, some original ideas from the best minds in the world, the research is out there and here's some references.

Tier 1 — published research (where real edges come from):

1. Quantpedia — <https://quantpedia.com/>
An encyclopedia of documented strategies with source papers. Partly paywalled, but the free screener is genuinely useful for generating hypotheses.
2. Quantocracy — <https://quantocracy.com/>
A daily curated mashup of the quant blogosphere. Best single bookmark on this list; still actively publishing.
3. Alpha Architect — <https://alphaarchitect.com/an-introduction-to-investing-and-how-to-use-our-site/>
Rigorous, readable summaries of academic factor and trend research.
4. SSRN - <https://www.ssrn.com/index.cfm/en/fen/> and arXiv q-fin.TR — <https://arxiv.org/list/q-fin.TR/recent>
Primary sources. Search by anomaly name. Assume half the results don't survive out of sample.
5. Allocate Smartly — <https://allocatesmartly.com/>
Independent replication of published tactical allocation strategies. The value here is watching how published strategies perform after publication.

Closing note

None of these sheets will make you money this week. What they do is turn a year of scattered activity into a record — and a record is the only thing either you or an AI model can actually learn from.

Fill them in on the day. Write the emotion column honestly. Review the winners you got wrong as carefully as the losers. Everything else in the AI Cheat Sheet works better once these pages have something on them.

THE OTHER HALF OF THE GIVEAWAY

The AI Cheat Sheet holds the prompts these sheets feed — the portfolio X-ray, the trading performance dashboard, the research and journal prompts, and the guardrails for anyone automating. Section 02 there covers connecting ArihantPlus to your AI over MCP in four screens.

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