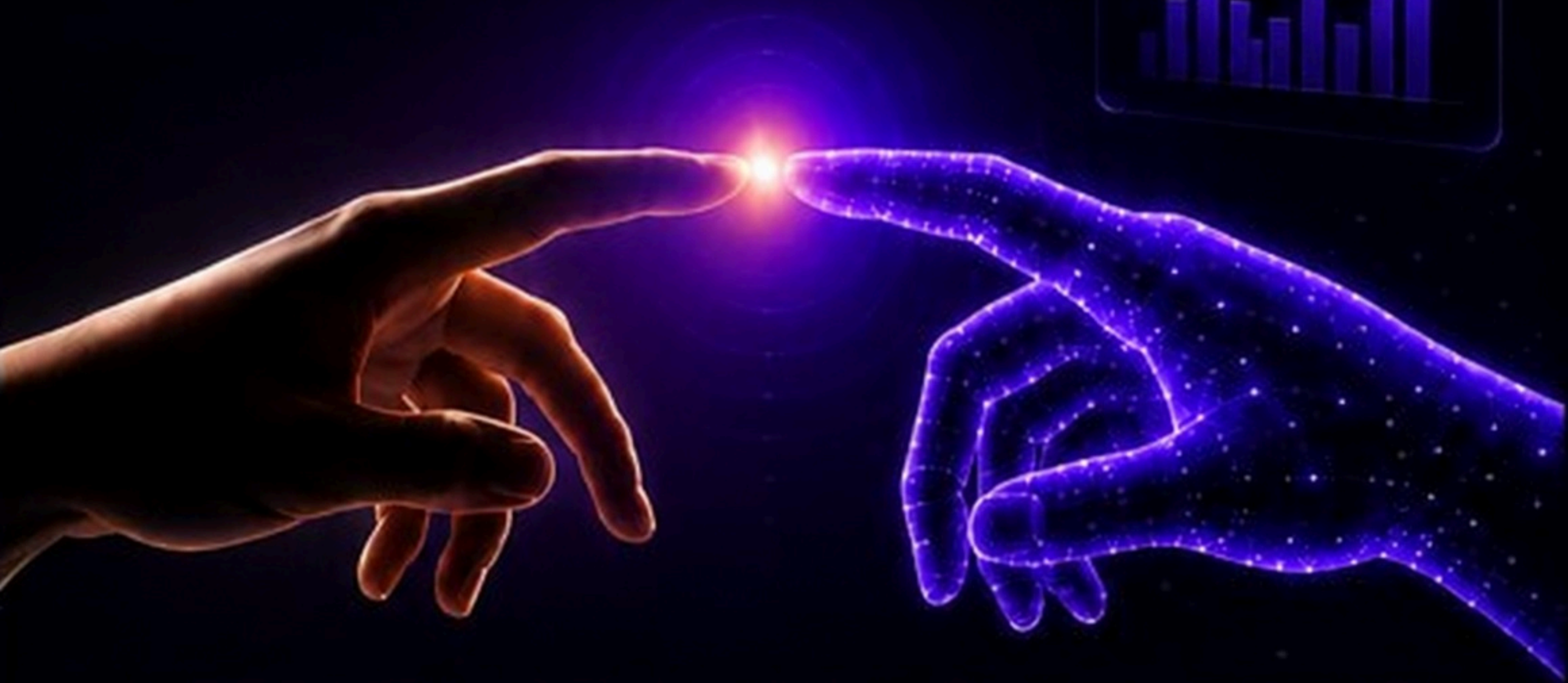
Arihant PLUS

Powered by Arihant Capital Markets Ltd

AI & Algo Conclave

AI Trading Cheatsheet

Research • Analyse • Trade



The AI Cheatsheet

Prompts, workflows and guardrails from the AI & Algo Conclave stage.

6 prompt categories · Setup guide · Follow-up prompts

Works with Claude · ChatGPT · Perplexity

Runs on ArihantPlus MCP · TradeBridge

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Introduction

Most people use AI like a chatbot — asking for stock ideas, market views, or investment advice. But there's one limitation: AI doesn't know your portfolio. That's where MCP (Model Context Protocol) comes in. With ArihantPlus MCP you can securely connect your ArihantPlus trading account with AI, allowing it to understand your actual holdings, positions, trades, and portfolio data. So once you are connected with MCP, every analysis and recommendation becomes personalised, contextual, and far more useful. You can even place a trade directly from Claude, ChatGPT, or Perplexity, and it will be executed on your ArihantPlus trading platform.

This guide contains:

a. **Connecting ArihantPlus MCP with AI – Claude, ChatGPT, Perplexity, etc**

b. **The prompt formula:** In investing, better inputs lead to better decisions—and AI works the same way. A strong prompt gives clear context, defines your objective, and specifies the kind of analysis you want. The more precise your instructions, the more relevant and actionable the insights become.

c. **Ready-to-use prompts (your cheat sheet):** You can simply copy and paste these into your AI chat after connecting MCP. We have provided multiple prompts that will help you analyse your portfolio, identify risks, review performance, generate insights, and even place your trades.

Connecting ArihantPlus to Your AI: MCP

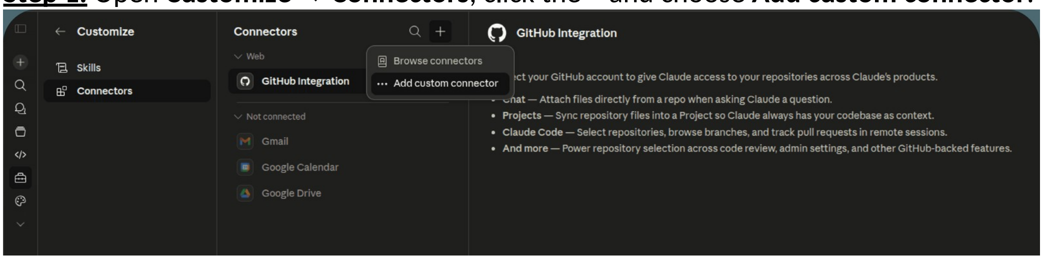
MCP (Model Context Protocol) is an open standard that lets an AI assistant connect to your trading platform and take real actions in real systems instead of only talking about them. Think of it as a universal adapter: it lets any compatible AI plug into the ArihantPlus trading platform, the same way a USB port lets any device plug into any computer.

You type a plain-language request, the AI calls the right tool, the ArihantPlus server authenticates and executes it, and the answer comes back conversationally — with a confirmation step before anything is final.

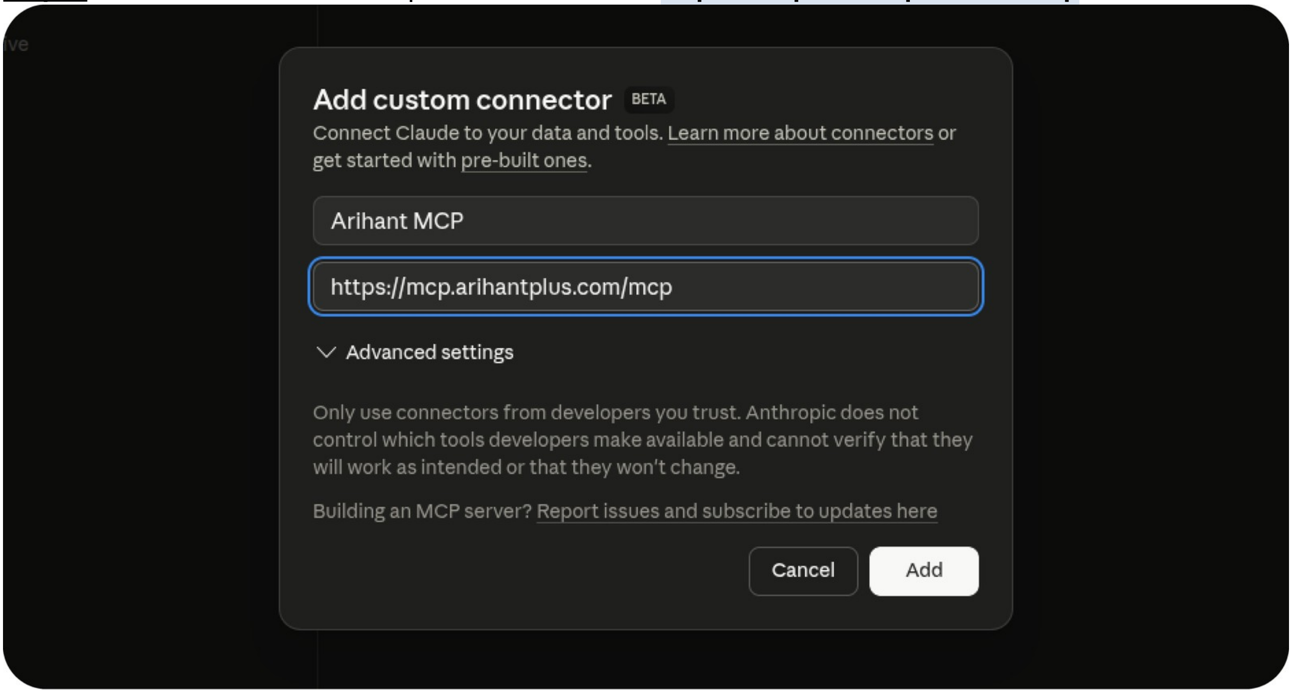
How to connect ArihantPlus MCP to your trading account

Making the connection is simple and takes about two minutes. Here is a step-by-step guide to connecting ArihantPlus MCP to Claude on desktop and web.

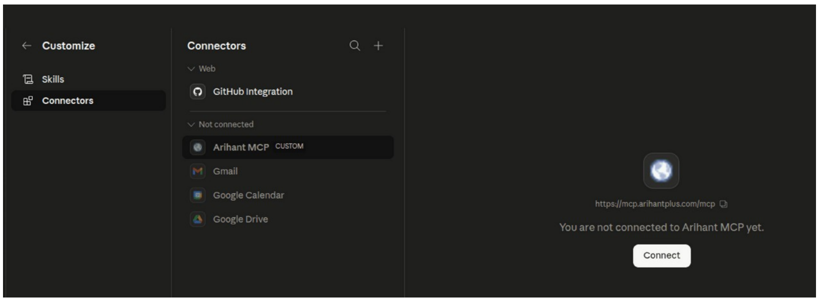
<u>**Step 1:**</u> Open **Customize → Connectors**, click the **+** and choose **Add custom connector**.

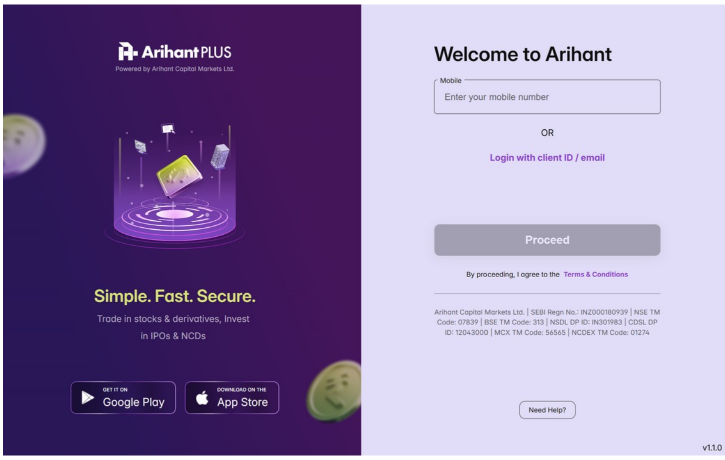


Step 2: Name it **Arihant MCP** and paste the server URL **https://mcp.arihantplus.com/mcp**. Then click **Add**.

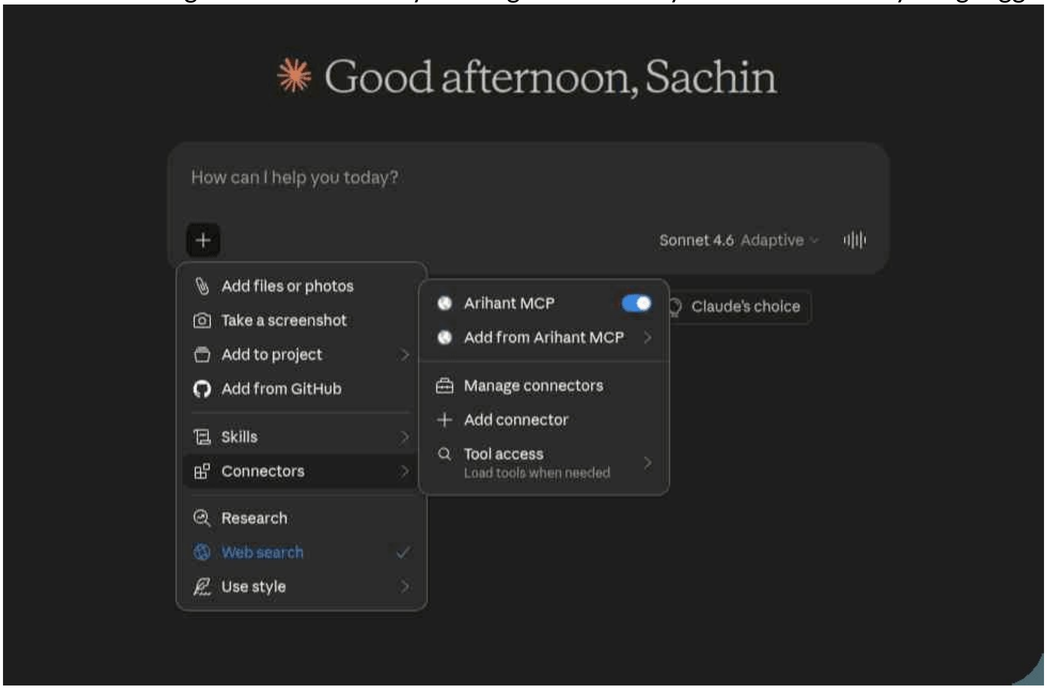


Step 3: It now appears under **Not connected**. Click Connect to open the ArihantPlus login page for authentication. Enter your login details.
Your login happens exclusively on the official ArihantPlus authentication page — not within Claude, ChatGPT or any other AI you are using. Your password is never shared with the AI; MCP grants permission-based access to supported account data and actions that you authorise.





Step 4: Back in a new chat, open **Connectors** from the **+** menu and check that **Arihant MCP** is toggled on. Then ask it something small — "show my holdings" — before you trust it with anything bigger.



You can also find a step-by-step guide on how to connect your ArihantPlus trading account with the AI assistant of your choice using ArihantPlus MCP here:

- [Blog Article on How to Connect your trading account with MCP]
- Video Guide on How to connect your trading account with MCP: English and Hindi

Connect with TradeBridge APIs if you are building something

The ArihantPlus API product is called TradeBridge. Getting a key takes about five minutes.

a) Go to tradebridge.arihantplus.com and log in with your ArihantPlus account.
b) Complete the verification step it asks for.
c) Click "+" to create a new API key, fill in the details, and save.
d) Copy both the API Key and the App ID — you are given two things and you need both.
e) Store them in environment variables or a private .env file excluded from version control.

Your key is your money. An API key has direct access to your trading account. It never goes into a chat window, a screenshot, a WhatsApp group or a public repository. If one leaks, deactivate and regenerate it from TradeBridge before you do anything else. Generate a separate key per strategy — it means you can kill one runaway bot without shutting down everything else.

You can find more details about TradeBridge documentation and connection here.

Check the IP whitelisting requirements and token expiry. Confirm both in the TradeBridge documentation before running a strategy.

The Prompt Formula

Use these five parts to make your instructions clear and reduce assumptions.

ROLE	Who should it become? Equity research analyst, portfolio manager, swing trader, risk manager, options specialist.
CONTEXT	Which market, and through which lens? "An Indian large-cap, from a five-year investment view."
TASK	The objective, stated plainly. Analyse, compare, review, rank, find the risks, tear this apart.
INPUT	What you attach. Annual report, quarterly results, portfolio, trade journal, chart, transcript — or a live MCP connection.
OUTPUT	The shape you want back. Table, dashboard, scorecard, checklist, one-page note, SWOT.

> ASSEMBLED
>
> You are an experienced equity research analyst reviewing an Indian company for a five-year investment horizon. Evaluate the attached annual report.
>
> Analyse the business model, financial performance, competitive advantages, valuation,
>
> risks and growth prospects. Present the findings in a concise table, followed by a
>
> balanced investment conclusion covering both the bull and the bear case.

Watch for a conclusion that argues both sides. If it only argues one, the model is telling you what you want to hear.

Three lines that upgrade any prompt

> MAKE IT PLAN FIRST
>
> Before you write anything, give me a five-line plan and wait for me to say go.

> MAKE IT INTERVIEW YOU
>
> Ask me 20 multiple-choice questions before you build this.

> MAKE IT BREAK ITS OWN WORK
>
> Tell me the three most likely ways this fails during live market hours.

The last one is frequently the most useful output of an entire session.

Your Prompt Cheatsheet

Here are some useful prompts to get started once you have connected ArihantPlus MCP to your AI assistant.

1. PORTFOLIO ANALYSIS PROMPT

Most of us start with 5-6 stocks we actually researched. Fast forward two years and it's suddenly 25 stocks, half of them "temporary" bets we forgot to sell — and nobody has the time to check each one's fundamentals, tally up sector exposure, or spot which ones are quietly bleeding money. Doing this analysis — researching every stock, checking balance sheets, mapping sectors, tracking news—can take weeks and most of us do not even have the know-how, skills, or time to do this research.

So most people just... don't, and only find out something's wrong months too late.

This prompt does that work for you in minutes: point it at your holdings and it pulls everything together into one clean health-check — sorting stocks into strong/shaky/risky buckets, showing where your money is over-concentrated, and calling out which ones to actually sell or trim, with reasons in plain English.

And because it's this fast, it's not a once-a-year ritual — you can run it monthly, or even weekly if markets are choppy, the same way you'd casually check your phone's battery health rather than waiting for it to die on you.

So use this prompt and let it analyse your portfolio, give you an overview of each stock in your portfolio, your sector breakup, diversification score, your portfolio risk profile along with reasons for any suggested sales of underperforming stocks.

PROMPT · PORTFOLIO ANALYSIS

Simply copy and paste this prompt into an AI chat, such as ChatGPT, Claude, or Perplexity.

You are an institutional portfolio manager and senior financial analyst. Analyse my equity portfolio from the connected ArihantPlus account or the data provided below and output a visually structured **HTML dashboard** (not plain ASCII/markdown) with coloured boxes, a coloured sector chart, and large, readable text throughout.

Visual requirements:

1. **Top metric strip** — a row of small, coloured stat boxes (not large blocks) for: Total Stocks Tracked, Total Invested, Market Value, Unrealised P&L, Overall Risk Profile, Diversification Score. Each box: compact size, bold large number/value, small muted label above it. Use a distinct accent colour per box (e.g. purple, green, amber, red shades) so the strip reads like a real dashboard, not a table.
2. **Fundamental Health Distribution** — three visually distinct coloured boxes side by side (green = Strong, amber = Neutral/Watchlist, red = Weak/Red Flags), each showing: a large count, the percentage of the portfolio it represents, a one-line description, and a thin fill-bar underneath showing its proportion. Make these visually punchy — this is the section that should catch the eye first.
3. **Sector Allocation** — do NOT just list sectors in text. Render sector exposure as a **coloured horizontal bar chart** (largest sector at top, smallest at bottom), using distinct flat colours from a consistent palette, with the sector name and % labelled per bar. Place a compact sector % table alongside it (table on one side, chart on the other) rather than stacking them.
4. Keep box borders/cards small and tight (compact padding), but make all text inside — numbers, labels, table contents — comfortably large and easy to read at a glance. Prioritise readability over density.
5. Use flat colours only (no gradients/shadows/neon), consistent color families throughout, and make sure it still reads clearly if printed or viewed on mobile.

Analysis requirements:

1. Use connected holdings when available; otherwise ask me to provide the portfolio data. Parse the stocks, buy price (if provided), quantity/allocation percentage, and country/market.
2. Calculate the breakdown. State sources, dates, missing data, and scoring methods; do not invent figures.

3. Assess fundamentals (debt, earnings growth, ROE/ROCE, management, valuation, competitive moat).
4. Analyse diversification across market caps, sectors, and geography.
5. Identify explicit SELL candidates with specific risk metrics, each as its own flagged card (red accent border, bulleted flaw/valuation issue/growth risk, and a recommended action line).
6. List upcoming corporate events (earnings, dividends, splits, macroeconomic headwinds) in a simple table.

Sections to include, in this order:

- Top metric strip (coloured boxes)
- Fundamental Health Distribution (3 coloured boxes)
- Sector Allocation & Concentration (table + chart side by side)
- Stock Analysis Matrix (full table: Ticker | Fundamental Rating | Valuation | Moat Quality | Allocation % | Action)
- Sell / Trim Candidates (one card per flagged stock)
- Upcoming Events & Calendar (table)

MY PORTFOLIO DATA: [Use connected holdings, or insert your list of stocks here. Example:

- Apple (AAPL) - 15 shares @ $180
- Microsoft (MSFT) - 20% allocation
- Reliance Industries - 50 shares ...etc.]

If nothing at all comes back as a trim candidate, either your portfolio is genuinely clean or the model is being polite. Ask it directly: "which single holding would you cut first if forced to cut one, and why?"

Five follow-ups to run on the same answer

POSITION SIZING

Are my position sizes appropriate given the quality and risk profile of each holding?

SECTOR ALLOCATION

Which sectors am I overweight and underweight in, against a broad Indian market benchmark? Can you suggest an ideal sector breakdown for my portfolio?

RISK REVIEW

Identify the three biggest risks in this portfolio. Rank them by potential damage rather than likelihood, assuming the market falls 4–5% from current levels.

REBALANCING

Ask for my objectives and any missing tax or cost inputs, then suggest a rebalancing strategy that respects those objectives. Estimate tax and brokerage using the applicable rules, and state your assumptions.

COMMITTEE REVIEW

Review this portfolio as if presenting it to an investment committee. Highlight strengths, weaknesses, hidden risks and practical recommendations.

Disclaimer: *This is an AI-generated analysis meant only as a starting point for your own research — not investment advice, and not a substitute for a SEBI-registered investment adviser. Please do not take any buy/sell decision based solely on this output; verify all data independently and consult a qualified adviser before trading.*

2. PORTFOLIO RISK MANAGER PROMPT

Risk management is one of the most important pillars of successful trading and investing. You can use AI as your personal portfolio risk manager. But instead of asking "How's my portfolio?", ask questions a professional trader would ask. Here are some risk prompts to get you started.

Use the following prompts to analyse your portfolio's risk.

Copy and paste any of the following prompts into an AI chat, such as ChatGPT, Claude, or Perplexity. If your objectives, conviction, planned risk, or time horizon are missing, ask the AI to clarify them before analysing.

01 · Complete Risk Audit

Act as a senior portfolio risk manager. Analyse my ArihantPlus portfolio for concentration risk, sector exposure, position sizing, volatility, and downside risk. Rank my top 5 risks by severity and recommend specific actions to reduce risk while explaining the trade-offs for long-term returns. Present the output as a scorecard.

02 · Find Positions Where Risk Has Escalated

Ask for my planned risk or stop-loss levels if unavailable. Find open positions where my actual loss has exceeded my planned risk, so I can reassess my position before the loss grows further.

03 · Position Sizing Check

Ask for my objectives and conviction levels if unavailable. Review every holding in my portfolio. Tell me which positions are oversized or undersized based on risk, conviction, and diversification. Suggest an ideal allocation with clear percentage weights.

04 · Capital Protection Review

Evaluate my portfolio with capital preservation as the priority. Identify holdings carrying unnecessary downside risk, suggest where I should trim exposure, and recommend how much cash or defensive allocation would improve overall portfolio stability.

05 · Hidden Concentration Risk

Look beyond sectors and identify hidden concentration in my portfolio. Check whether multiple stocks depend on the same theme, commodity, customer, promoter group, or macroeconomic driver. Explain the risks in simple language.

3. DAILY PORTFOLIO WATCH — DASHBOARD PROMPT

When you own multiple stocks, staying updated on everything that could affect them is difficult. News, corporate actions, results, and shareholding changes are spread across different platforms, and important developments can easily be missed.

Use this prompt as your **daily portfolio watchlist**. In one click, AI scans your portfolio and brings together the key developments across all your holdings, including corporate actions, company news, results, breakouts, unusual volume, bulk/block deals, shareholding changes, and other significant events. With this one prompt, you can quickly see **what changed, what matters, and which stocks need your attention**, without checking multiple websites or apps.

Paste this prompt into Claude, with web search enabled and ArihantPlus MCP connected, to get a daily colour-coded dashboard of developments across your stocks.

PROMPT · PORTFOLIO WATCH TO TRACK KEY EVENTS AND NEWS IMPACTING YOUR PORTFOLIO

Simply copy and paste this prompt into an AI chat, such as ChatGPT, Claude, or Perplexity.

You are my portfolio monitoring assistant. Check my equity holdings [list your stocks/quantities here, or connect your brokerage/holdings source] for anything noteworthy since my last check (or since the previous market close if this is the first run), and report back as a visual, colour-coded HTML dashboard — never plain paragraph text.

For each stock, check:

1. Price & volume moves
   - Price change >5% (up or down) since previous close
   - Volume spike >2x the average volume
   - New 52-week high or low
   - Upper or lower circuit hit
   - Breakout (price breaks above a key resistance level or the 50/200 DMA) or breakdown (price breaks below a key support level or the 50/200 DMA) — flag explicitly by name
2. Corporate actions
   - Dividends, bonus issues, stock splits, buybacks, rights issues, mergers/demergers, or other announced actions
   - Record dates, AGM dates, and buyback windows coming up
3. Results
   - If results were just announced, pull the actual key numbers — revenue, net profit/PAT, margins, YoY and QoQ growth — not just "results announced"
   - If results are due soon, flag the expected date
4. Bulk/block deals
   - Any bulk or block deals reported for the stock
5. Shareholding pattern changes
   - Promoter, FII, or DII stake changes
6. Other major news
   - Management changes, regulatory action, major contracts, litigation, or anything else materially significant

For each item found, judge whether it's positive, negative, or neutral/informational, using context rather than a mechanical rule (e.g. a 52-week low caused by weak results is negative on both counts, not two separate neutral facts).

Also build a 3-day forward-looking calendar across all holdings (not just flagged ones): upcoming results dates, corporate action dates, fundraising windows (QIP/FPO/rights), and any sector-relevant economic or policy events (only include these when genuinely relevant to that stock's sector).

Render the output as a dashboard, structured top to bottom:

1. A full-width "biggest story today" card for the single most significant item across the portfolio
2. A grid of cards, one per other flagged stock, colour-coded by sentiment (green = positive, red = negative, grey = neutral/informational), one line per point
3. The 3-day forward calendar, full width, placed last

Rules:

- Only include stocks with at least one flagged item in the main grid — name any stock with nothing flagged in a short footer line instead, don't give it an empty card
- If nothing is flagged across the whole portfolio, say so in one line — don't force a dashboard
- Keep each bullet to one line with the specific number/date that matters (e.g. "Net profit fell 36% YoY to ₹298 cr despite revenue up 2%")
- Never fabricate numbers — if a data point isn't available, mark it as unavailable rather than estimating
- Cite news sources briefly since these come from web search

4. PLACING A TRADE PROMPT

With MCP connected, you can place a trade from ChatGPT, Claude, or Perplexity using a simple prompt. Include the security, action, quantity, order type, limit price where applicable, product type, exchange, and validity. Ask the AI to clarify missing details and show the complete order for your confirmation before submitting it.

What can you trade through AI (MCP)?

- You can buy/sell stocks and ETFs
- Place F&O trades

You can also check your margin before placing a trade.

WHAT TO INCLUDE IN A TRADE PROMPT

For a stock or ETF order, include these eight details in your prompt:

1. Stock / Security — Name of the stock you want to trade
2. Action — Buy or Sell
3. Order Type — Market or Limit
4. Limit Price — Required for a limit order; not applicable to a market order
5. Quantity — Number of shares
6. Product Type — Delivery or Intraday
7. Exchange — NSE or BSE
8. Validity — For example, DAY

Prompt formula: [Buy/Sell] + [Security] + [Quantity] + [Order Type] + [Limit Price, if applicable] + [Exchange] + [Product Type] + [Validity]

Example:

Market Order — when you want to buy/sell at the best available market price:

Buy 100 shares of Reliance Industries on NSE at Market Price for Delivery, with DAY validity. Show the order details and wait for my confirmation before submitting.

Limit Order — when you want to buy/sell only at a specific price or better:

Buy 100 shares of Reliance Industries on NSE at a Limit Price of ₹1,400 for Delivery, with DAY validity. Show the order details and wait for my confirmation before submitting.

Make sure your trading account has sufficient funds for successful order execution. If your account does not have enough balance, the order will be rejected.

A word of caution: AI chat-based execution is better suited to investors than active traders, as there can be a small delay between your prompt and order execution, during which the market price may move.

Busy or planning ahead? You can also place an AMO (After Market Order) through AI, so you don't have to wait for the market to open.

5. IPO ANALYSIS PROMPT

IPO decisions are often driven by **hype, subscription numbers, or GMP**—without understanding the business behind the issue. But knowing *what the company does*, *why it is raising money*, *how it makes money*, *and what risks it carries* is critical before investing. Most of us do not have the time or skill to analyse the company behind the IPO and understand the DRHP of the IPO.

Use this prompt to turn the lengthy **DRHP (often 500+ pages)** into a clear, investor-friendly analysis. AI researches the company, breaks down the key information, highlights the **IPO's purpose, financials, valuation, strengths, risks, and red flags**, and gives you a structured overview to help you make a more informed decision.

PROMPT · IPO ANALYSIS

Simply copy and paste this prompt into an AI chat, such as ChatGPT, Claude, or Perplexity.

I am providing you with the DRHP (Draft Red Herring Prospectus) for [Company Name]. Analyse this document with extreme objectivity, ignoring marketing spin, and give me a complete breakdown structured into the following five sections. Use the supplied DRHP and clearly cited current sources. If the issue price or current data is unavailable, state that limitation instead of estimating valuation or sentiment.

Make the output highly visual and easy to scan, using clean tables, KPI cards, bar charts for yearly/quarterly trends, pie or donut charts for financial/IPO composition, and clearly marked YoY growth and trend arrows wherever relevant.

- Business Model & Moat: What does it do, how does it make money, and what are its competitive advantages and biggest risks?
- Financial Health: Show the last 3 years of revenue, margins, profit, cash flow, and debt (values in crores). Flag what is improving and what is breaking.
- Offer Breakdown: How much is Fresh Issue vs Offer For Sale (OFS), where is the new money going, and who is cashing out?
- Peer Comparison: Compare it with its closest listed peers on P/E, EV/EBITDA, and ROE. Is it cheap, fair, or expensive?
- Sentiment & GMP: Summarise available current analyst views and the latest reported GMP, with sources and dates, explaining why GMP alone should not drive an investment decision.

Keep the final output concise, structured like a professional IPO dashboard, and use visuals wherever they make the numbers or trends easier to understand.

Copy this, paste it into Claude with any DRHP, and never buy an IPO blind again!

Don't invest in hype. Understand the business first.

6. LONG-TERM STOCK DISCOVERY PROMPT

Many beginner retail investors in India want to enter the stock market for long-term wealth creation, but they quickly become overwhelmed by thousands of listed companies, social media hype, and aggressive day-trading tips. This often leads to emotional decision-making, buying overvalued hype stocks, or feeling paralysed by information overload and not knowing where to begin. The **Long-term stock discovery prompt** solves this exact problem by acting as a preliminary, objective screening filter. It is sector-agnostic and will filter out stocks based on fundamentals, allowing users to cut through the noise, replace speculation with structured research, and surface a shortlist of financially healthy companies as a preliminary starting point for deeper individual analysis.

Use this prompt only as a preliminary screening tool for further research.

Before using this prompt

1. Think of this prompt as a quick preliminary filter to narrow down the noise, not an investment guide or a buy/sell list. Do your own research, and consult a SEBI-registered adviser before investing your money!
2. None of this is a buy signal — it's a filter pass/fail, which is a very different thing from "this will go up."
3. AI may lack current market data, cannot predict stock performance, and can generate incorrect figures. Verify all figures in the AI-generated output against current primary sources before taking action.

PROMPT • IDENTIFY LONG-TERM STOCKS

Simply copy and paste this prompt into an AI chat, such as ChatGPT, Claude, or Perplexity.

Act as a conservative equity research analyst helping a long-term retail investor. I want to screen for potential compounders in sectors likely to see structural growth over the next 5-10 years (you choose the sectors — e.g. could include renewable energy, EVs, digital/fintech infrastructure, healthcare, specialty manufacturing, consumer discretionary, or others you think are well-positioned).

For each sector you identify, name 1-2 established, exchange-listed companies (NSE/BSE) and evaluate them against these criteria. Define and explain suitable sector-specific screening thresholds before applying them:

- Profitability: Return on Equity (ROE) trend over the last 3 years
- Balance sheet strength: Debt-to-Equity ratio, and whether debt is reasonable for that sector's business model (e.g. capital-intensive sectors like renewables or infra will run higher leverage than asset-light ones like IT — flag this instead of penalising it blindly).
- Ownership quality: Promoter/majority-shareholder holding level, and whether any shares are pledged (state the % pledged if any — don't just say "yes/no")

If a criterion does not apply cleanly to a company or sector, explain why and use a more suitable measure. Consider sector-specific business models when interpreting leverage and ownership.

For each company, summarise in plain English:

a) What drives its revenue
b) Its competitive advantage / moat (or state clearly if it doesn't have a durable one)
c) Key risks specific to that company (not generic market risk)

Do NOT recommend buying or selling, do NOT give a target price, and do NOT predict where the stock will go. This is a screening exercise to identify names worth researching further — not investment advice. Where you're uncertain about current figures, say so explicitly rather than estimating.

Keep the full response under 400 words.

You should always independently verify all output metrics (e.g., ROE, Debt ratios, promoter holdings, cash flows) using primary official sources such as **BSE India**, **NSE India**, **SEBI disclosures**, company websites or statutory annual reports.

Closing Note

AI is not a shortcut to market success. Its real value is helping you think more clearly, research more efficiently and decide more consistently.

Two things from the conclave are worth carrying forward. First, ask AI to challenge your assumptions and explain the bear case. Second, always verify AI outputs and review safeguards before acting.

The investors who combine sound principles with AI-assisted research build a lasting advantage in speed, organisation and judgement. Keep learning. Invest wisely.

> **IF SOMETHING BREAKS**
>
> Write to customersupport@arihantcapital.com or raise a ticket at support.arihantcapital.com. The TradeBridge section there covers security, rate limits and regenerating a compromised key.

Disclaimer

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