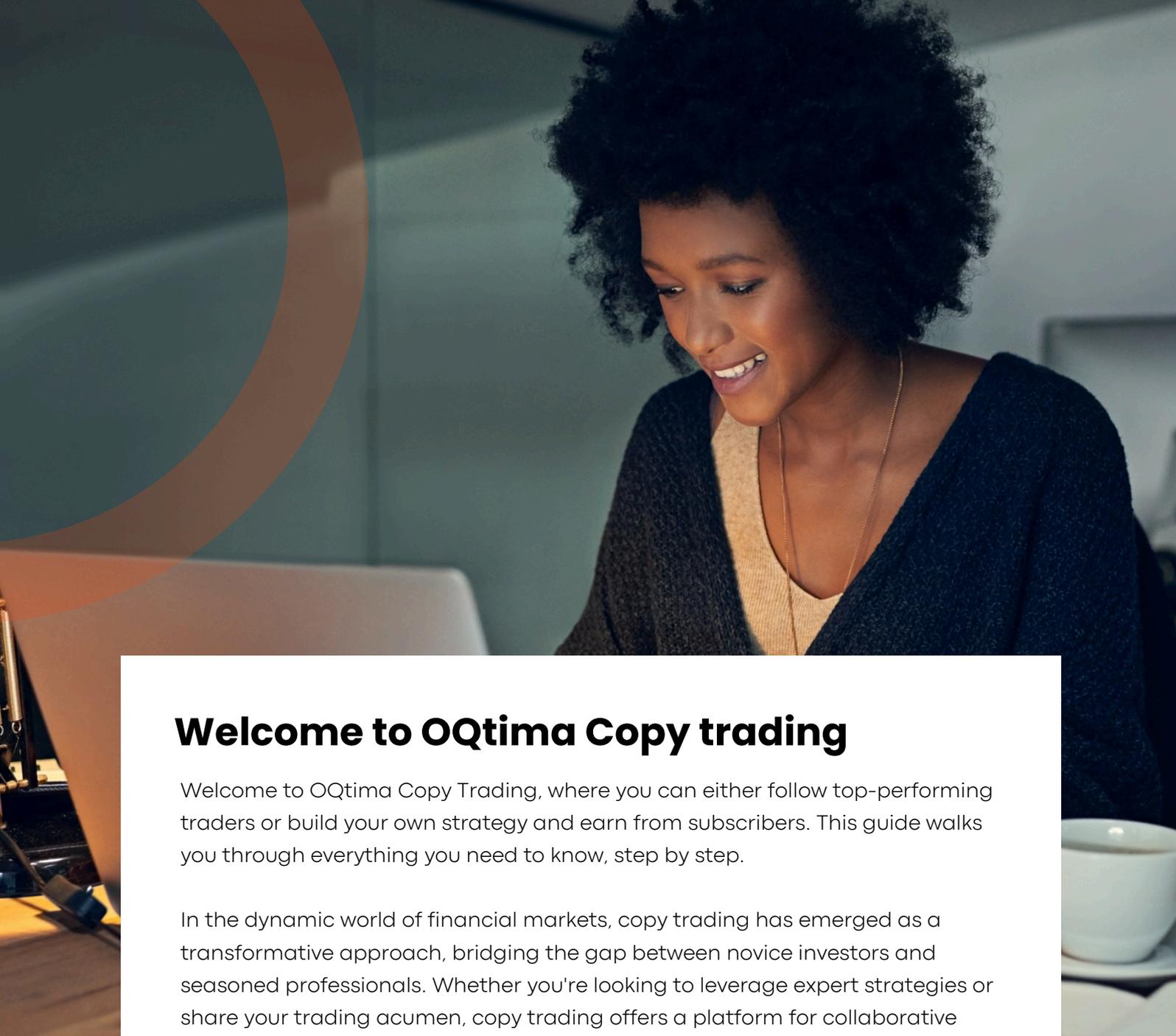


# Copy Trading Playbook

A practical step-by-step manual to follow and  
manage expert strategies on OQtima





## Welcome to OQtima Copy trading

Welcome to OQtima Copy Trading, where you can either follow top-performing traders or build your own strategy and earn from subscribers. This guide walks you through everything you need to know, step by step.

In the dynamic world of financial markets, copy trading has emerged as a transformative approach, bridging the gap between novice investors and seasoned professionals. Whether you're looking to leverage expert strategies or share your trading acumen, copy trading offers a platform for collaborative success.

### Followers: Learn and Earn

Copy trading allows individuals with limited market experience or time constraints to automatically replicate the trades of experienced traders. By selecting a provider whose trading style aligns with your investment goals and risk tolerance.

- **Access expertise:** benefit from the knowledge and strategies of seasoned traders without the need for in-depth market analysis.
- **Save time:** engage in trading activities without dedicating extensive hours to market monitoring.
- **Diversify investments:** spread your investments across various providers to mitigate risk.

Copy trading

# How it Works

## 01.

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### **Select a Provider**

Choose a provider whose performance and strategy align with your investment goals, reviewing their performance metrics, risk levels, and trading history.

## 03.

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### **Automate trades**

Once set up, trades executed by the provider are automatically replicated in the follower's account.

## 02.

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### **Allocate Funds**

Decide on the amount of capital you wish to allocate for copying the selected provider's activities.

## 04.

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### **Monitor Performance**

Followers can monitor performance, adjust allocations, or stop copying at any time.

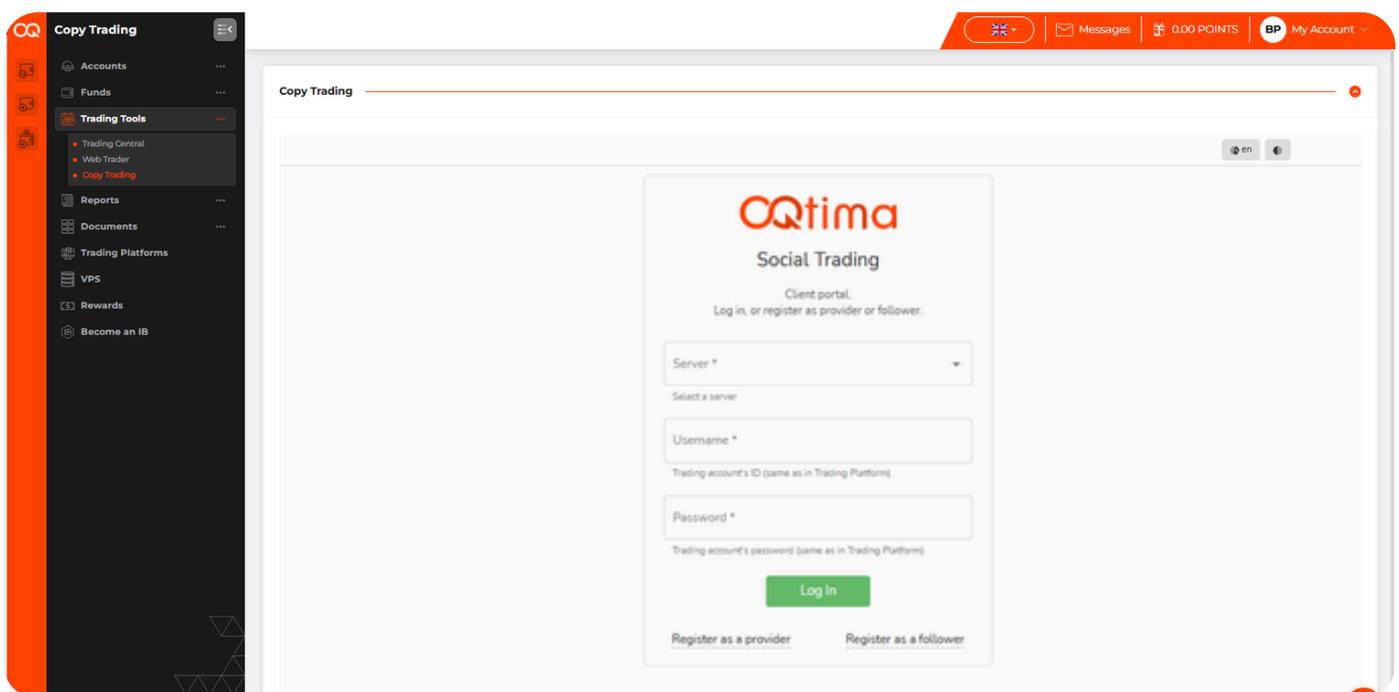
# Getting started

To begin:

1. Log in to your Client Portal
2. Go to Dashboard > Trading Tools > Copy Trading

As an OQtima Client you have instant access to our copytrading platform. Simply log in with one of your existing MT4 or MT5 trading accounts.

Login by selecting the server and then enter the trading account number and trading account password.



The screenshot shows the OQtima Social Trading Client Portal. On the left is a dark sidebar menu with the following items: Copy Trading, Accounts, Funds, Trading Tools (highlighted), Reports, Documents, Trading Platforms, VPS, Rewards, and Become an IB. The main content area is titled 'Copy Trading' and features the OQtima logo and 'Social Trading' text. Below this, it says 'Client portal. Log in, or register as provider or follower.' The login form includes a 'Server \*' dropdown menu, a 'Username \*' text field, and a 'Password \*' text field. A green 'Log In' button is positioned below the password field. At the bottom of the form, there are two links: 'Register as a provider' and 'Register as a follower'. The top right of the page shows a navigation bar with 'Messages', '0.00 POINTS', and 'My Account'.

# Follow strategies that fit you

## Register as a follower

### Option 1:

1. Register your trading account as a follower on the log in page.
2. Select the account you would like to use to follow and then select from the available providers.
3. Details of the offers will be listed on the right hand side.

Please note that if the offer has a registration fee this will be applied at the time of registration.

The left screenshot shows the CQtima mobile app's 'Social Trading' login screen. It features the CQtima logo and the text 'Social Trading Client portal. Log in, or register as provider or follower.' Below this are four input fields: 'Server \*', 'Username \*', 'Trading account's ID (same as in Trading Platform)', and 'Password \*'. A green 'Log in' button is positioned below the password field. At the bottom, there are two buttons: 'Register as a provider' and 'Register as a follower', with the latter highlighted in orange.

The right screenshot shows the 'Subscription registration' screen. It has the CQtima logo and the text 'Subscription registration Creating a new subscription'. The form is divided into two columns. The left column contains fields for 'Server \*', 'Trading account \*', 'Trading account ID', 'Password \*', 'Trading account password', 'Provider \*', and 'Scalping Strategy'. The right column, titled 'Details', contains information about the chosen provider and subscription conditions, including 'PROVIDER', 'Nickname', 'Visibility', 'Server', 'OFFER', 'Title', and 'Performance fee'. A green 'Register' button is at the bottom center, and a 'Login as a client' link is at the bottom right.

### Option 2:

1. Log in with one of your trading accounts, as a client and then browse available offers from the dashboard and the public rating page.
2. Select an offer and subscribe to the offer of your choice.

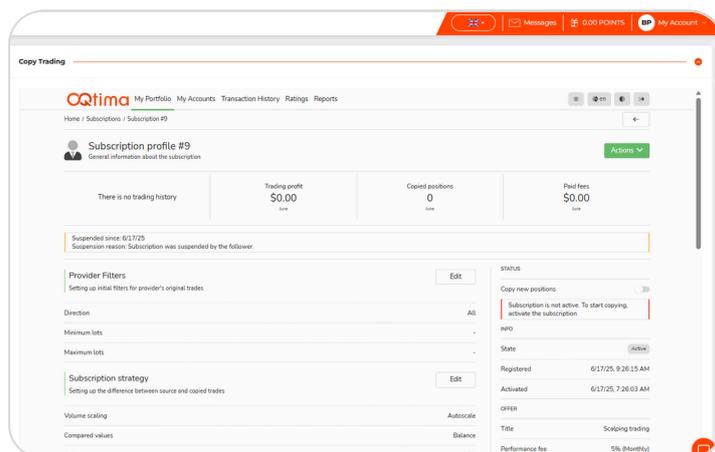
Once you've registered your main account, you can also add any other accounts you have by selecting My Dashboard > Create and New Account.

The screenshot shows the CQtima web dashboard. The top navigation bar includes 'Copy Trading', 'Messages', '0.00 POINTS', and 'My Account'. The main content area is titled 'Ratings' and shows a list of providers. A table displays the following data for a provider named 'Scalping Trader':

Name	Total profit	Equity	Age (Days)
Scalping Trader	\$0.00	\$1.00	5

Below the table, there are additional details for the 'Scalping Trader' provider, including 'Return (total)' and 'Max drawdown'. A 'Profile' button is visible next to the provider's name. The page also includes a search bar, filters, and a 'Refresh' button.

After registering you can edit the subscription settings such as: Provider Filters, Subscription strategy, Correction and Risk Management.



## Providers Filters

### Direction

Select the direction of the trades you want to copy. All, Buy or Sell.

- All - copy both Buy and Sell trades
- Buy - copy only Buy trades
- Sell - copy only Sell trades

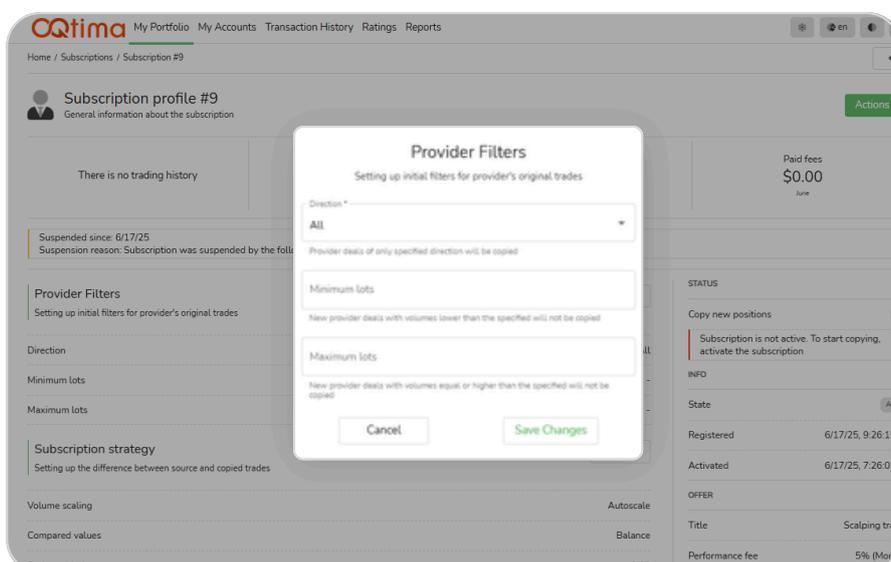
### Lots

#### Minimum Lots

Set the minimum trading volume for the trades you want to copy.

#### Maximum Lots

Set a maximum trading volume you want to copy. Trades above this limit will not be copied.



# Subscription Strategy:

## Volume scaling

Select how you want to scale your volume strategy. Autoscale, Multiply or Fixed.

### Autoscale

Trade size is automatically adjusted based on the ratio between the follower's and provider's account balance or equity.

#### Example:

Compared value set to: Balance  
Ratio multiplier set to: 3  
Provider: \$1,000  
Follower: \$300

#### Provider opens:

Buy 1 lot of EUR/USD. Follower Copied  
trade size =  $300/1000 \times 3 = 0.9$  lots

The follower would open a 0.9 lot trade

If you selected Equity it will compare the providers and followers equity instead of the account balance

### Multiply

The copied volume is equal to the provider's original volume multiplied by the Volume multiplier.

#### Example:

If the Multiply ratio is set to 2 and the provider opens a position of 100 lots, your account will copy it as 200 lots.

### Fixed

Regardless of the provider's trade size, each copied trade is executed using a fixed, pre-defined lot size.

#### Example:

If the fixed lot size is set to 2, your account will always copy trades as 2 lots, no matter the provider's position size.

## Volume Multiplier

How much of the provider's trade volume you want to copy. For example, a multiplier of 2 means you'll copy double their volume.

## Copy Direction

### Direct

Direct will copy the trades in their original direction.

E.g. A Buy trade will be copied over as a Buy trade.

### Reverse

This option will reverse the direction of the copied trades.

E.g. A Buy trade will be copied over as a Sell trade.

## Small Volume Handling

Select from Skip low Volumes or Risk by rounding to minimum lot

- **Skip low Volumes** - Small volumes are skipped and will not be copied.
- **Risk by rounding to minimum lot.** - Chose to copy such positions by selecting the Risk by rounding to min. lot option. Please note, that the option carries a risk of increased margin usage.

The screenshot displays the 'Copy Trading' interface with a 'Subscription strategy' modal window open. The modal is titled 'Subscription strategy' and contains the following settings:

- Volume scaling \***: Autoscale (dropdown menu)
- Compared value \***: Balance (dropdown menu)
- Ratio multiplier \***: 0.05 (input field)
- Copy direction \***: Direct (dropdown menu)
- Small volumes handling \***: Risk by rounding to min lot (dropdown menu)

Below the settings, there are 'Cancel' and 'Save Changes' buttons. The background interface shows various subscription parameters like 'Direction', 'Minimum lots', 'Maximum lots', 'Correction', and 'Risk Management'. On the right side, there is an 'INFO' section with details like 'State: Active', 'Registered: 6/17/25, 9:26:15 AM', and 'Activated: 6/17/25, 7:26:03 AM'.

## Correction:

### Skip

Trades with volume higher than the maximum volume will be skipped. Example If you set the max volume to 15 lots, trades above this volume will be skipped.

### Scale down

Trades above the maximum volume will be scaled down to the maximum allowed volume. Example: If a providers open a 16 lot trade it will be scaled down to the maximum allowed volume you entered previously. eg. 15

### Correction

Final processing of copies' parameters

Max open volume

The maximum volume to be copied

Action \*

Determines the action taken if the copy's volume calculated according to the strategy is higher than specified in Max open volume.  
Scale down: The resulting volume of the copy will be equal to Max open volume.  
Skip: The copy will not be opened.

Cancel
Save Changes

## Risk Management

Set overall take-profit/stop-loss thresholds at the subscription level. When your total profit or loss from copied trades hits the defined limit, the system will take action.

### Parameter

Choose a parameter to compare

- Total loss - set a total loss at which the system will stop copying trades
- Total profit - set a total profit at which the system will stop copying trades
- Floating loss - set a total floating loss at which the system will stop copying trades

### Threshold

A value in USD that is used to compare and perform the automatic action. Trigger the configured Subscription and Trading actions when the value reaches or exceeds this threshold.

#### Example:

Threshold: 5000

Parameter: Total loss

The system will stop copying trades once the total loss on the account will reach 5000.

## Subscription action

- **Keep:** do not perform any action. The subscription will continue as normal, and all trades will be copied as set up in the previous settings.
- **Suspend:** This will pause the subscription, and no new trades will be copied over.
- **Unsubscribe:** Unsubscribe from provider. The strategy will no longer be available in the future.

## Trading action

**Keep all** - do not perform any action on copied positions.

**Close all** - close all copied positions

**Close unprofitable** - close copied positions one by one, starting with the most least profitable one, until loss level becomes lower than the threshold.

**Close all unprofitable** - only closes the unprofitable trades.

Once all the settings are configured the Subscription needs to be activated.

### Risk Management

Setting up the subscription's acceptable risks

Parameter \* ▼

A measure that is compared to the level to perform the automatic action

Threshold \* ↕ \$

A value that is used to compare and perform the automatic action

Subscription action \* ▼

Actions in case the specified threshold is reached.  
Keep: do not perform any action on subscription.  
Suspend: suspend subscription.  
Unsubscribe: unsubscribe from provider.

Trading action \* ▼

Actions in case the specified threshold is reached.  
Keep all: do not perform any action on copied position.  
Close all: close all copied positions.  
Close unprofitable: close copied positions one by one, starting with the most losing one, until loss level becomes lower than the threshold.  
Close all unprofitable: close all copies with loss.

Cancel
Create

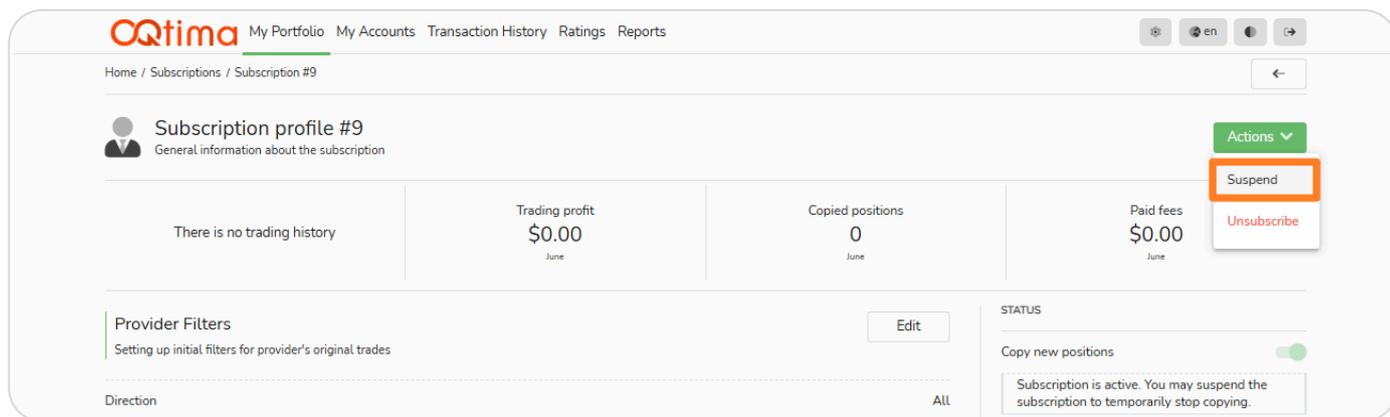
Click activate and select one of the options for the providers current positions:

- **Copy** - copy the providers currently opened trades. Please note that trades will be copied over at the current market price which may result in a different outcome from the providers trades.
- **Ignore** - Ignore all current opened trades. You will only copy new trades that are opened after the subscription is activated.

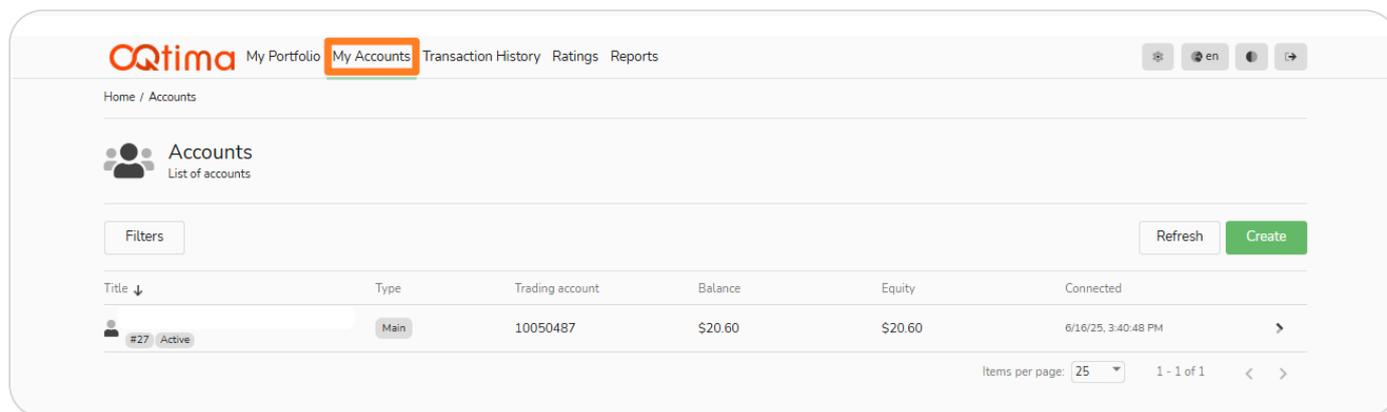
**Note:** for the best risk management it is best to select Ignore at this step

The screenshot shows the OQtima user interface for a subscription profile. At the top, there are navigation links: My Portfolio, My Accounts, Transaction History, Ratings, and Reports. The main heading is 'Subscription profile #9' with a sub-heading 'General information about the subscription'. Below this, there are four data points: 'There is no trading history', 'Trading profit \$0.00 June', 'Copied positions 0 June', and 'Paid fees \$0.00 June'. A yellow warning box states 'Suspended since: 6/17/25' and 'Suspension reason: Subscription was suspended by the follower.'. At the bottom, there is a 'Provider Filters' section and an 'Edit' button. On the right side, an 'Actions' dropdown menu is open, showing 'Activate' (highlighted with an orange box) and 'Unsubscribe' options.

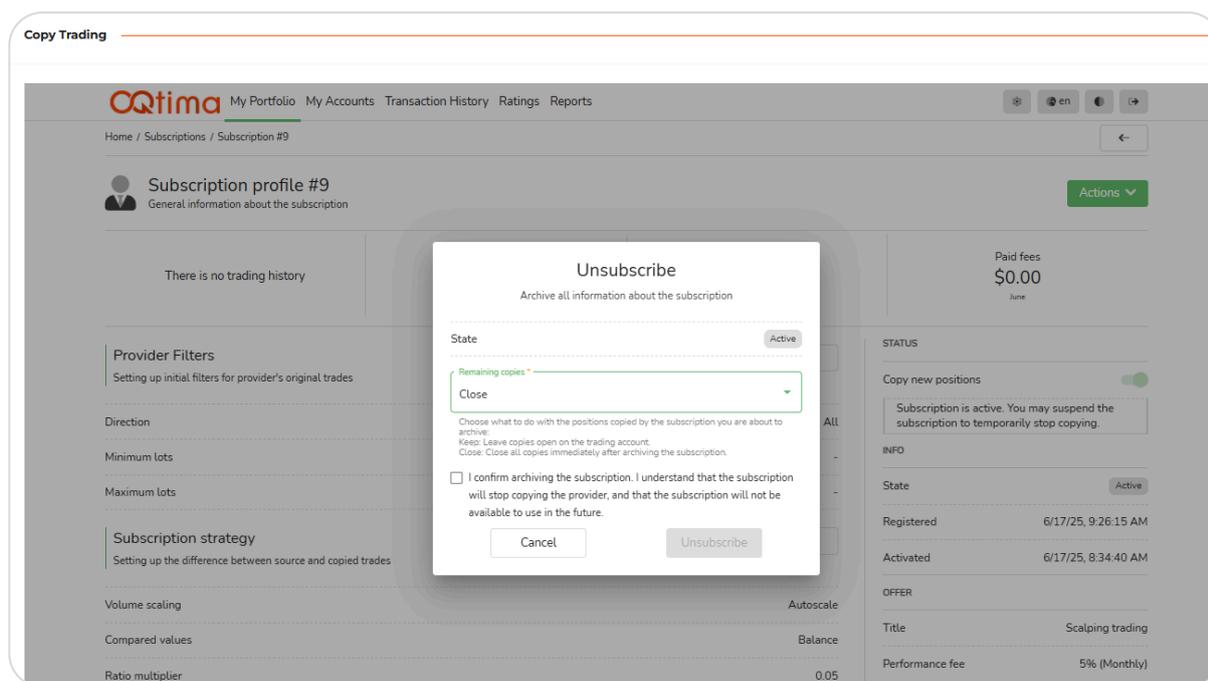
You can pause the subscription at any time by selecting Suspend from the Actions. Alternatively you can Unsubscribe if you prefer to stop copying the provider.



You can then view and access all your accounts from the dashboard under my accounts.



### Cancelling the subscription



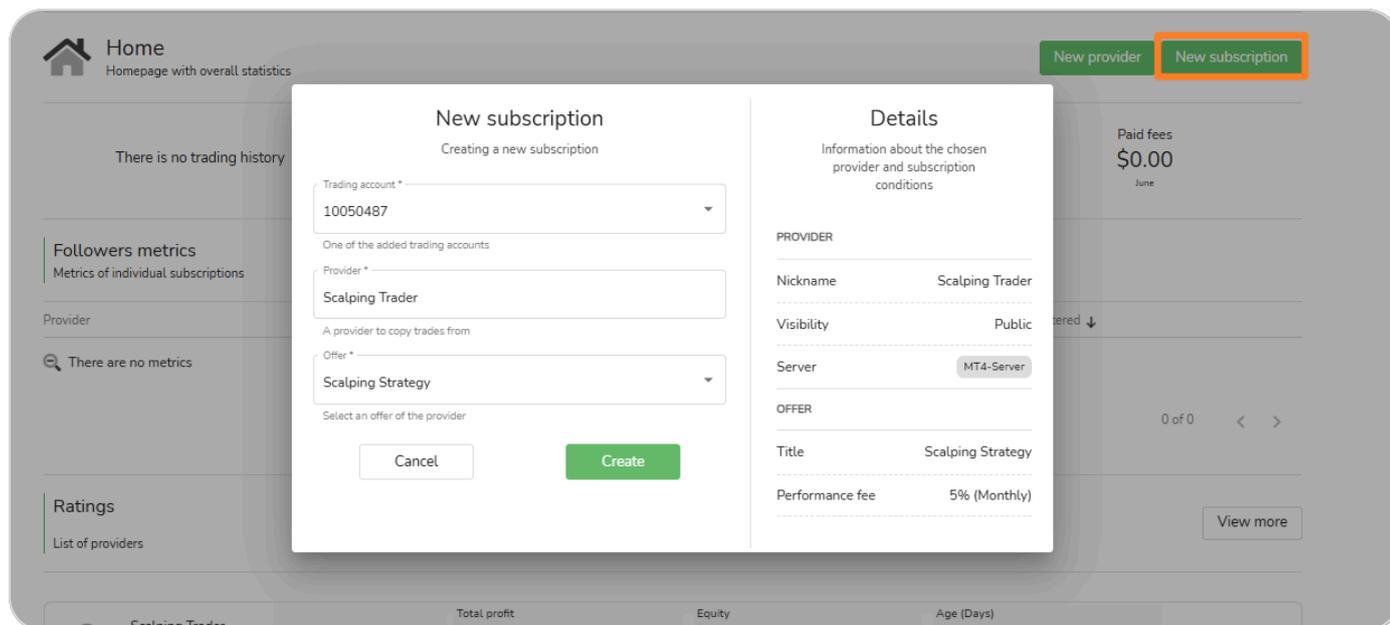
**Keep:** all copied trades will remain open, and you will need to close them manually.  
**Close:** all trades will be closed immediately at the current market price.

## Create a new subscription

Once your accounts are registered and listed on the **My Accounts** tab you can go ahead and subscribe to the available providers.

Go to **My Accounts > Create**

1. Select the account you want to use
2. Choose the provider and offer



Multiple strategy subscriptions are supported and can be managed centrally from your **My Account** page. Please note that each subscription must be associated with a single trading account.

# Managing your subscriptions

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Subscriptions are inactive by default. This gives you time to configure everything before trades are copied.

When you activate a subscription, you'll choose whether to:

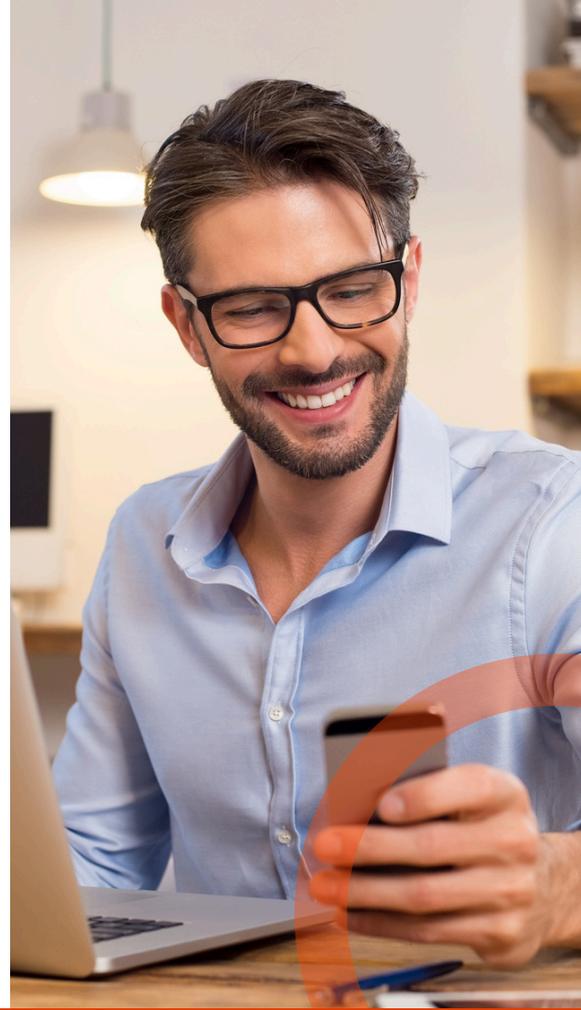
- Copy existing trades.
- Ignore current trades and only copy new ones

## Manage your subscription

You can pause, resume, or unsubscribe anytime from the Actions menu.

## Fine-Tune Your Subscription Settings

Configure before activation, and adjust anytime.



## 01. Trade filters

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- Copy all trades
- Only copy Buy or Sell
- Minimum/maximum lot size

## 02. Small volume handling

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- Skip trades below a set minimum
- Or round them up to the nearest tradable lot

## 03. Copy mode

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- Auto Scale: Volume matches your balance vs. the provider's
- Multiply: Copy a fixed multiplier of the provider's volume
- Fixed: Use your own fixed volume per trade

## 04. Risk Management

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Trigger auto-actions based on your custom risk thresholds:

- Close all
- Close only losing trades
- Suspend or keep subscription running

# Tracking your performance

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## → Home

See monthly profits, trade volume and fees

## → Followers Metrics

View activity across all copier accounts

## → My portfolio

Manage subscriptions, edit settings, add new strategies

## → Reports

Detailed logs of fees, copied trades, and trading outcomes

## F.A.Q

### Performance Fee & HWM

**Performance fees are only charged on profits that exceed the historical peak.** The system records the highest profit level achieved during the subscription (the "High-Water Mark").

Only when new profits surpass this previous peak will a performance fee be charged.

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### Agent models

- Public Agent: Anyone can refer clients and earn a % of the fee.
- Additional Agent: pre-approved partners with custom rates per offer

Combined agent fees can't exceed 100% of provider revenue

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### General

Max subscriptions per copier: Unlimited | Max offers per provider: 20

Max Fees:

- Registration Fee: \$500
  - Management Fee: \$100/month
  - Performance Fee: 50%
- 

### What if a trade is missed?

Our system retries up to 3 times. If it still fails, that trade won't be copied, but future trades continue as normal.

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### Management fee

Charged monthly, starting from subscription date. Subscription pauses if there aren't enough funds for the next cycle. If reactivated before the due date, you won't be charged twice.



### Still got questions?

You can reach our customer support team via live chat at [Oqtima.com](https://oqtima.com) or by email at [support@oqtima.com](mailto:support@oqtima.com).