

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.

Providers: Share your Strategy

If you're an experienced trader with a proven track record, copy trading platforms offer an avenue to:

- **Earn Additional Income:** receive performance commissions or fees based on the number of followers and their trading volume.
- **Build Reputation:** showcase your trading performance, attracting more followers over time.
- **Expand Influence:** reach a broader audience without the need for traditional fund management structures.

Copy trading

How it Works

01.

Selection

Followers browse through a list of providers, reviewing their performance metrics, risk levels, and trading history

03.

Automation

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

02.

Allocation

Decide on the amount to invest and allocate funds accordingly

04.

Monitoring

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

Set Up & Start Earning

Register as a Provider

Option 1:

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

On the login page you can select to register as a provider from the bottom left of the page.

The image shows two screenshots of the QQtima client portal. The left screenshot is the 'Social Trading' login page, titled 'Client portal. Log in, or register as provider or follower.' It has a 'Server *' dropdown menu, a 'Username *' text field, and a 'Password *' text field. At the bottom, there is a 'Log In' button and a 'Register as a provider' button highlighted with an orange border. The right screenshot is the 'Provider Registration' page, titled 'Creating a new provider'. It has a 'Server *' dropdown menu, a 'Trading account *' text field, a 'Password *' text field, and a 'Nickname *' text field. At the bottom, there is a 'Register' button and a 'Login as a client' link.

2. Choose your server
3. Enter your trading account (please note the first account you register with will be your primary account and cannot be deleted from your profile)
4. Enter your trading account password
5. Choose your public nickname

Option 2:

Once logged in with your MT4 or MT5 account you can register as a provider from the main dashboard

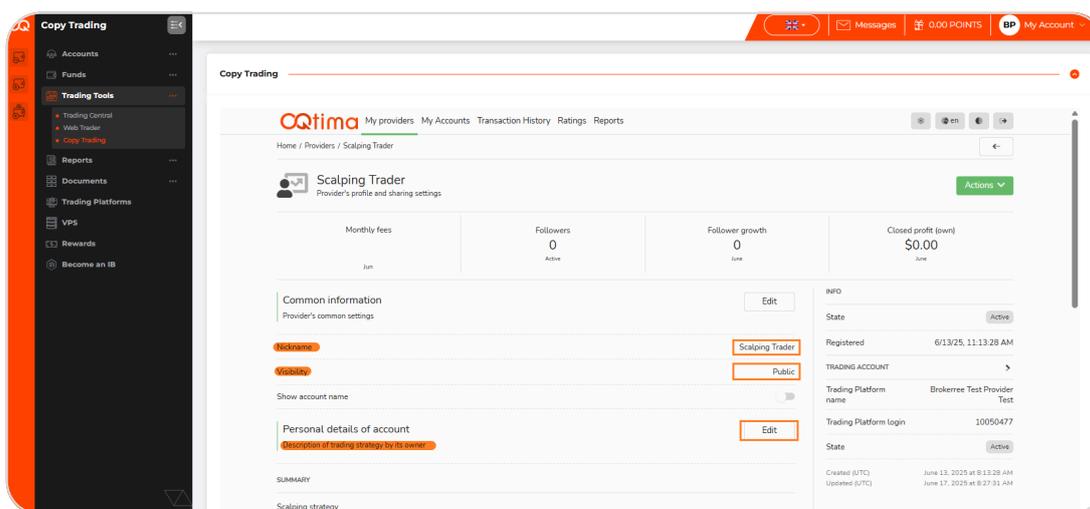
The image shows a screenshot of the QQtima main dashboard. A modal dialog box titled 'New provider' is open, with the text 'Create a new provider' below the title. The modal has a 'Trading account *' dropdown menu, a 'Nickname *' text field, and 'Cancel' and 'Create' buttons. The background shows the dashboard with a 'New provider' button highlighted in an orange box.

- Select the Trading Account you want to use as your provider account
- Enter your Provider Nickname. This will be the name shown on the public page if you choose to make your profile public.

Once registered, customise your strategy profile.

Profile & Strategy

- Edit your nickname and add an avatar image. This will be your public profile.
- Select to show your strategy to the public or make it private by invitation only.
- Add a description to your strategy.

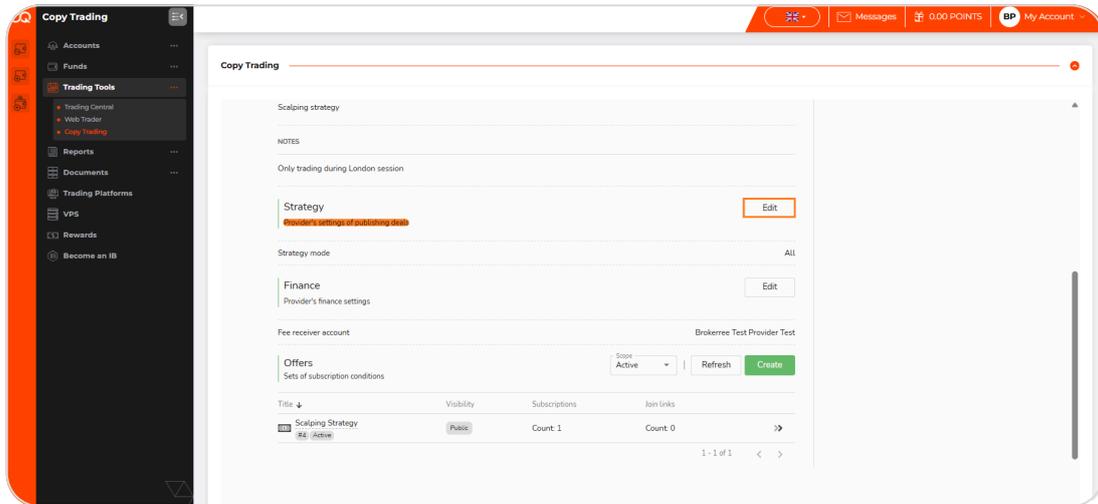


Important information to know when creating your own strategies (offers):

- You can only create one offer per trading account.
- If you wish to provide multiple trading strategies (offers), you must connect an additional trading account for each one.
- You cannot archive (delete) a strategy while it has active followers copying trades.
- You have the option to add a separate account to collect your fees and it will act as your wallet.
- You have the option to set a minimum balance for followers.
- Followers with balance lower than the required minimum balance will not be able to copy your strategy.

Set up your strategy

Strategy mode: All, or Out only

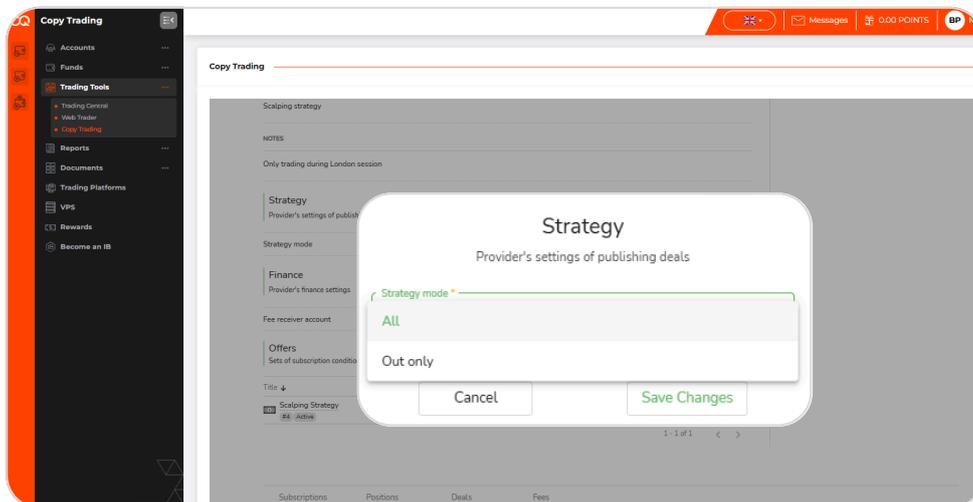


All

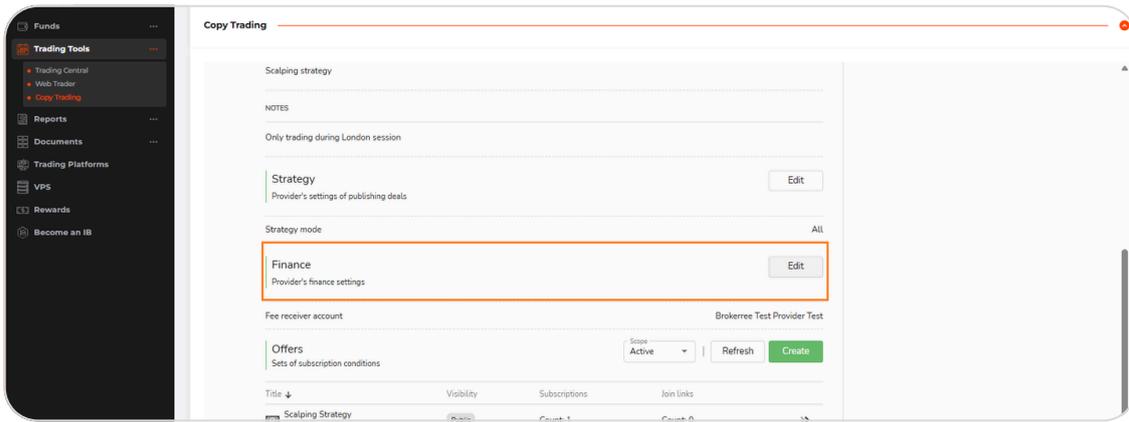
Allows the followers to copy all actions on the strategy account.

Out only

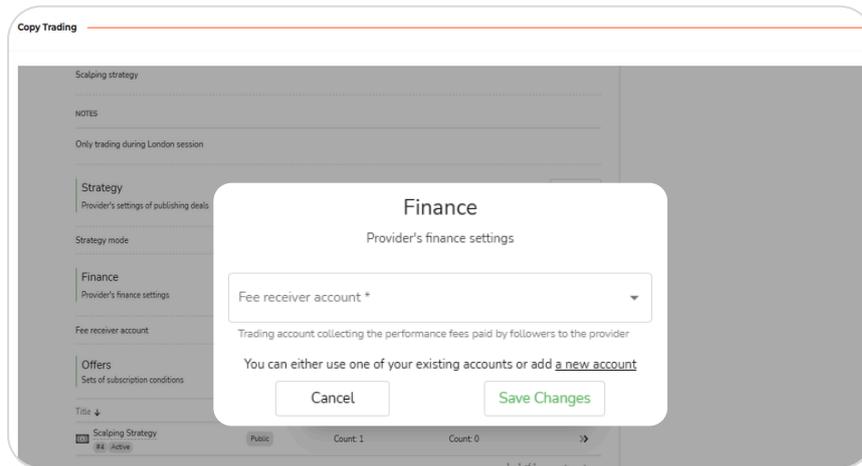
Allows the followers to only copy the closing of the trades. IE when you are wanting to close or archive a strategy this would be the setting to use.



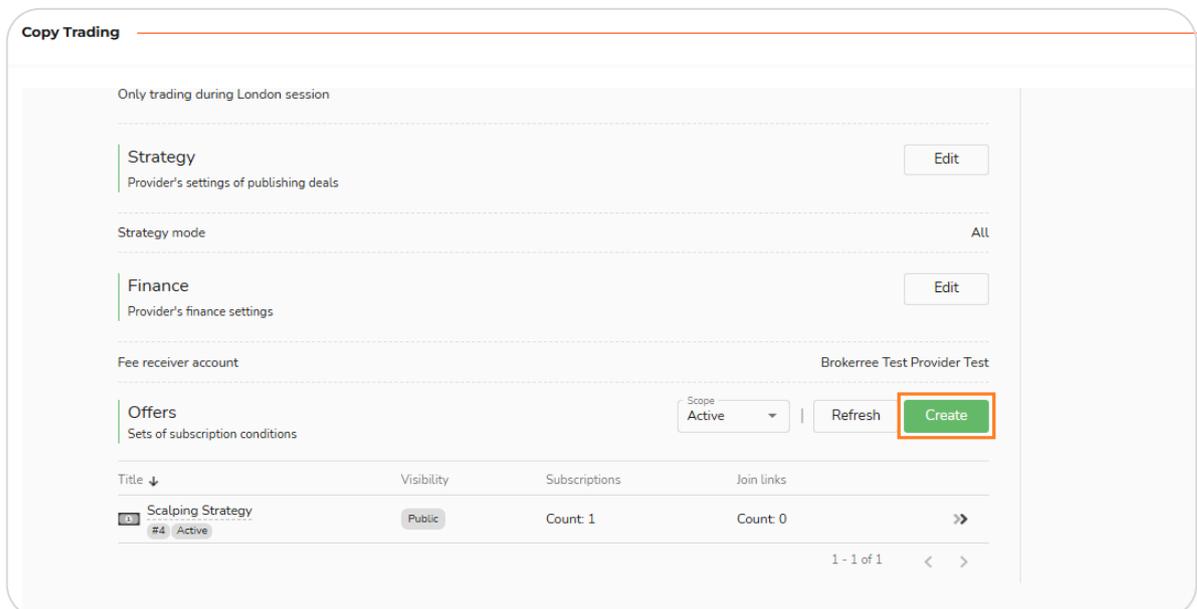
Finance Settings

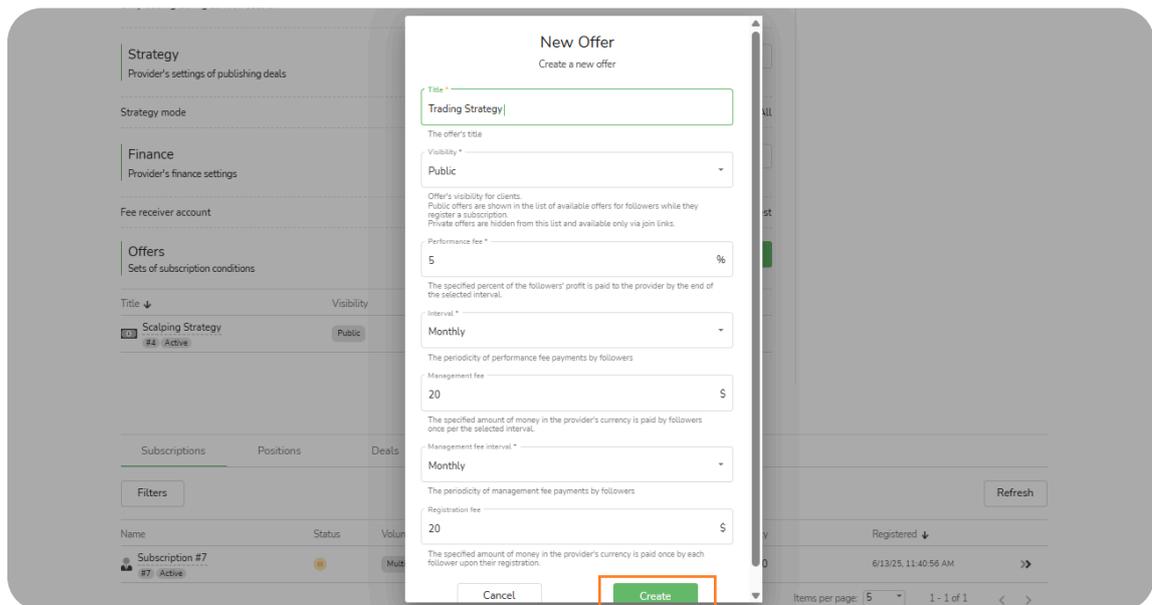


Set up how you want to collect your fees by selecting the account you wish to receive the funds to.



Create your first Offer (strategy)



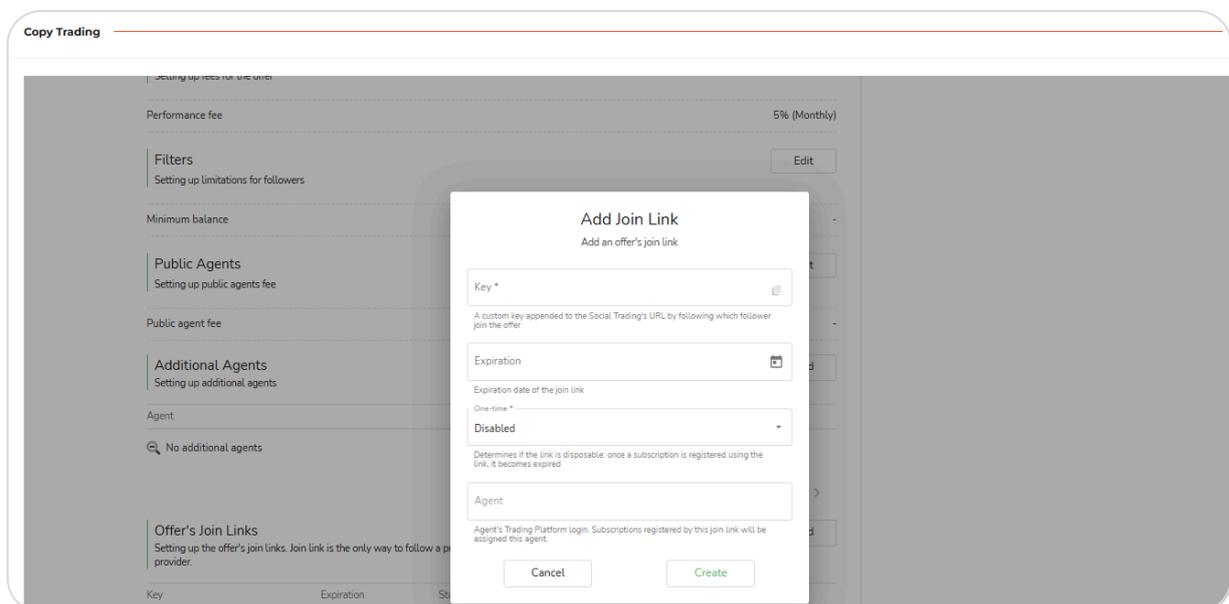


- Enter **Nickname** for the Offer (Strategy).

This is separate from your public provider profile name.

Visibility: Choose to make your offer public or private (by link invitation only). If you make it private then scroll to the Offer's Join links.

You must have at least one public offer (strategy) in order for your Public profile to be visible on the ratings page.

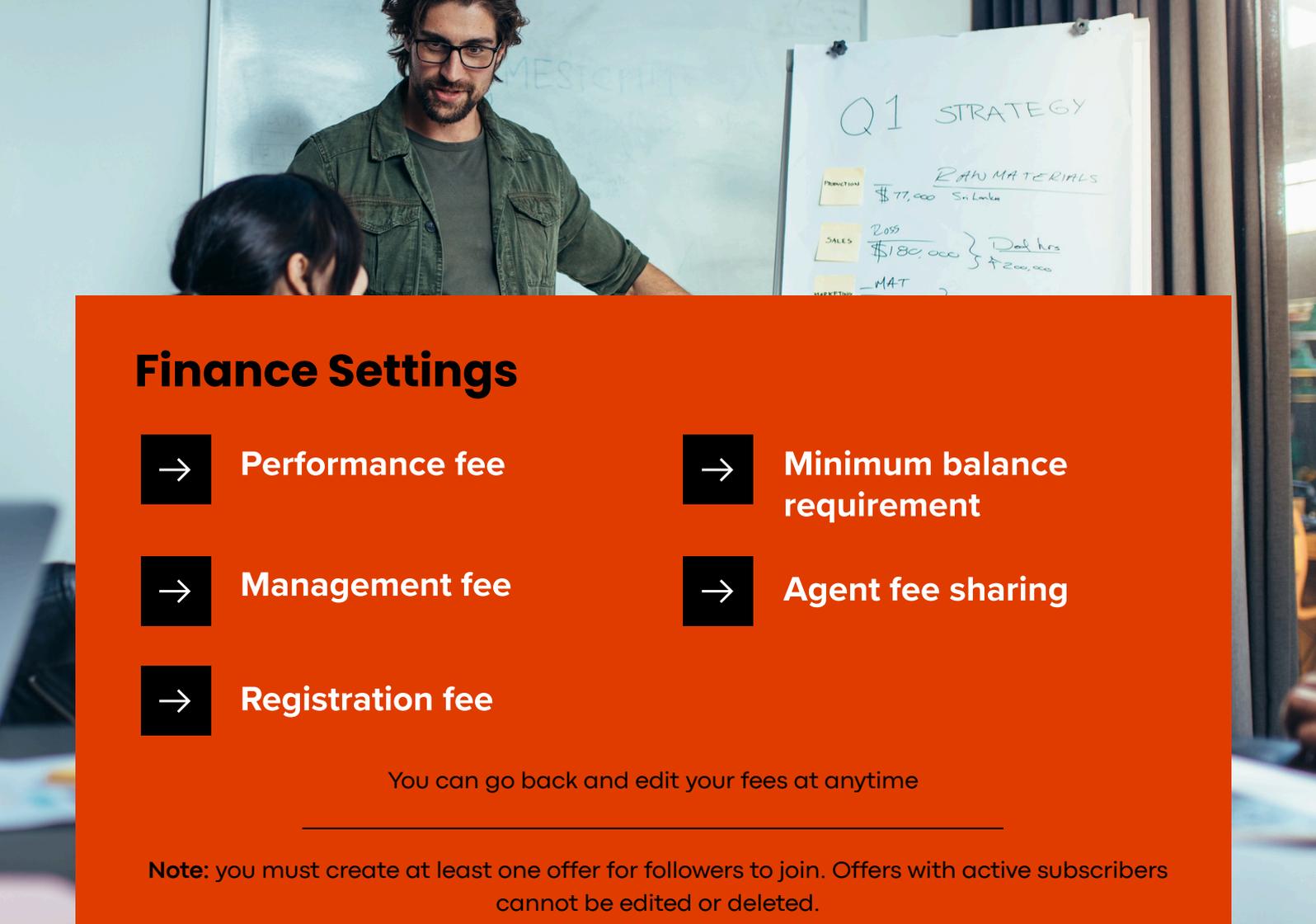


Key - Enter a unique key for your invite link (this will be part of the invitation link url)

Expiration - set a link expiration date (optional)

One-Time - Determines if the link is disposable: once a subscription is registered using the link, it becomes expired

Agent (optional) - Agent's Trading Platform login. Subscriptions registered by this join link will be assigned this agent.



Finance Settings



Performance fee



Minimum balance requirement



Management fee



Agent fee sharing



Registration fee

You can go back and edit your fees at anytime

Note: you must create at least one offer for followers to join. Offers with active subscribers cannot be edited or deleted.

Account Management & Fees

Archiving Accounts

- Only additional accounts can be archived
- Provider/copier accounts must be inactive to archive
- Use the Archive option during unsubscription

Understanding Copy Trading Fees

Here's how fees work between copiers, providers, and agents:

- **Registration Fee** – one-time fee to join a strategy
- **Management Fee** – recurring (usually monthly)
- **Performance Fee (HWM)*** – only charged on profits, using a High-Water Mark system
- **Platform Fee** – charged to the provider (currently waived)
- **Agent Fees** – shared with public or additional agents depending on offer setup

Fees are calculated based on performance, frequency, and structure set by the provider. For detailed examples, refer to our Fee Breakdown Guide.

Tracking your performance

→ **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

→ **My Providers**

View and manage all strategies you offer

→ **Copier Stats**

See who's following you and how each copier is performing

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.

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

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.

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.