



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

# 02.

### Allocation

Decide on the amount to invest and allocate funds accordingly

# 03.

## **Automation**

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

# 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.

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Social Trading	Provider Registration Creating a new provider
Log in, or register as provider or follower.	Server*
Server *	Select a server
Select a server	100000
Username *	Trading account ID Password *
Trading account's ID (same as in Trading Platform)	
Password *	Trading account password Nickname *
Trading account's password (same as in Trading Platform)	Niciname Partietor
Register as a provider Register as a follower	Login as a client

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

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- 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.

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#### 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

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#### 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.

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# **Finance Settings**

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Strategy mode	Provider's finance settings
Finance Provider's finance settings	Fee receiver account *
Fee receiver account	Trading account collecting the performance fees paid by followers to the provider
Offers Sets of subscription conditions	You can either use one of your existing accounts or add <u>a new account</u>
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## Create your first Offer (strategy)

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Offers			Performance fee *				
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Subscription #7		Multi	The specified amount of money in the provider's currency is paid once by each follower upon their registration.		0	6/13/25, 11:40:56 AM	>>

• 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.

Detung up rees for the offer		
Performance fee	5% (Monthly)	
Filters	Edit	
Setting up limitations for followers		
Minimum balance	Add Join Link -	
Public Agente	Add an offer's join link	
Setting up public agents fee	Key*	
Public agent fee	A custom key appended to the Social Trading's URL by following which follower join the offer	
Additional Agents	Expiration	
Setting up additional agents	Expiration date of the join link	
Agent	One-time *	
Q No additional agents	Determines if the link is disposable: once a subscription is registered using the link, it becomes expired	
	Agent	
Offer's Join Links	Agent's Trading Platform Login. Subscriptions registered by this join link will be	

**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.



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**

## $\rightarrow$ Home

See monthly profits, trade volume and fees



# My portfolio

Manage subscriptions, edit settings, add new strategies

## $\rightarrow$

## My Providers

View and manage all strategies you offer

# → Followers Metrics

View activity across all copier accounts

# → Reports

Detailed logs of fees, copied trades, and trading outcomes

# $\rightarrow$ Copier Stats

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

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# 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 f the next cycle If reactivated before the due date, you won't be charged twice.