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Copy Trading Solution

A closer connection
to strategy.



Connect strategy providers and follower accounts within a considered brokerage experience. Bring strategy information, copying preferences and ongoing account controls into the same journey.

One connection.
Room for individual choice.

Copy Trading Solution links a follower's account to a strategy provider. The provider's trades are copied according to the follower's allocation and copying settings, rather than entered individually by the follower.



The strategy

A provider supplies the trading activity. Strategy information, trading history and risk context help the follower assess the approach.

The account

The follower configures the connection around their own allocation and copying limits, with controls close to the strategy they follow.

The relationship

The connection remains an ongoing decision. Followers review copied positions, revisit their settings and pause when their preferences change.

A connected trading experience, with the follower still involved.

Context before the connection.

A strategy should be understandable before it becomes part of an account's activity. Give clients a clear place to explore the provider and consider the approach.



Look beyond a headline

Provider information, trading history and risk context support a more considered review. Clients can compare what is available and assess whether a strategy fits their preferences.

Choose a deliberate next step

Exploring a strategy is separate from connecting a trading account. Discovery leads into account configuration when the client decides to participate.

Connect the account. Define the relationship.

The account connection brings the provider's trading activity and the follower's preferences together. Configuration gives that relationship its operating context.



A clear source and destination

The master account provides the activity that connected follower accounts copy. Each account relationship is considered alongside its selected copying mechanism and applicable limits.

A managed connection workflow

Broker-managed programmes support operational mapping of clients to selected masters. These connections sit within the brokerage's authorised account-access process.

Four ways to configure copying.

Paperbot's confirmed copying mechanisms give your brokerage a choice of how account relationships are configured.



Balance multiplier

A balance-based copying mechanism.

Equity multiplier

An equity-based copying mechanism.

Fixed balance multiplier

A fixed-balance copying mechanism.

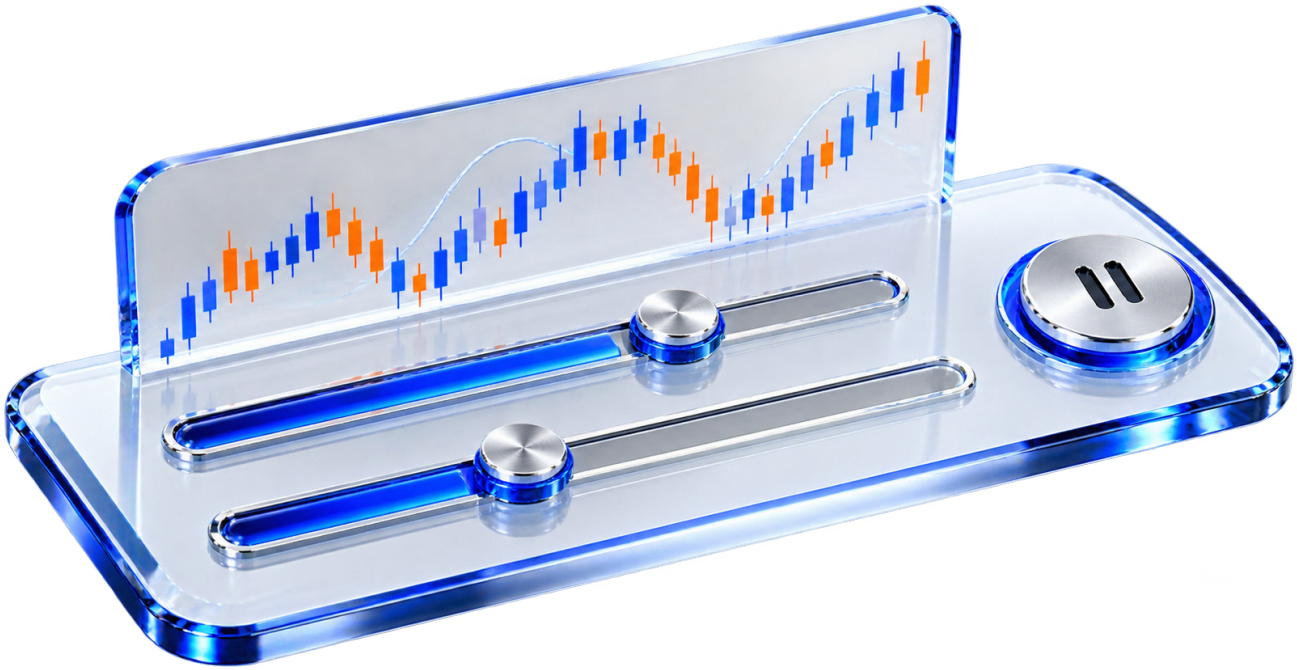
Lot multiplier

A lot-based copying mechanism.

Choose the mechanism for the intended account relationship. Calculation rules and configuration are reviewed in the product walkthrough.

Individual accounts. Individual boundaries.

Keep the follower's own allocation and copying preferences close to the strategy connection. Participation should remain understandable at account level.



Set the account's preferences

Allocation and copying limits define how the follower account participates in a provider's activity. The selected mechanism and account settings are considered together.

Keep the choice ongoing

Followers can revisit settings and pause the connection as their needs change. Copying remains an active account relationship, with controls available after the initial setup.

Copied trades can make losses as well as gains. Copying controls do not guarantee a maximum loss.

Keep copied activity in view.

Once a connection is active, the client experience should make its ongoing activity clear. Position review belongs alongside the settings that shape copying.



Review the account's activity

Followers can monitor copied positions and keep the relationship between the chosen strategy and their account in view. Strategy information remains part of that wider context.

Return to the controls

Reviewing positions, revisiting copying preferences and pausing the connection are part of continuing account involvement. The journey extends beyond choosing a provider.

Visuals are product concepts. Charts are illustrative, not verified results or forecasts.

A programme shaped from the broker’s side.

A clear operating model connects the brokerage, strategy source and follower. Their responsibilities remain distinct, even when the experience is connected.



Brokerage

Define provider eligibility, organise account connections and establish the follower controls appropriate to your offering.

Strategy provider

Supply the trading activity behind the strategy. Broker-operated master accounts support programmes managed by your own team.

Follower

Assess the strategy, configure the account relationship and remain involved through position review and copying controls.

Your operating choices shape how the service is offered to clients.

Part of your Paperbot ecosystem.

Present Copy Trading Solution as part of the broader brokerage relationship, with account connections and follower controls considered alongside the client experience.



Keep the journey connected

Paperbot's ecosystem brings the strategy relationship into the context of the brokerage's wider technology. Clients have a coherent route from strategy information to account configuration and ongoing review.

Shape the deployment

For brokerages using Paperbot CRM, discuss how copying access and operational workflows fit the client portal. The integration treatment and deployment scope are agreed for your environment.

A fit for your offering. A clear path to launch.

Start with the way your brokerage wants to offer Copy Trading Solution. A focused walkthrough connects product choices with your client and operational workflows.

The client experience

Review strategy discovery, account connections, copying settings, position review and the ability to pause.

The operating setup

Discuss provider eligibility, broker-managed masters, authorised account mapping and your chosen copying configuration.

The agreed engagement

Confirm the deployment environment, integration requirements and commercial terms in a written quotation. Pricing is defined for your selected scope.

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Handcrafted for your business.

A trading service should feel like a considered part of your brokerage. We connect product design, technology and practical workflows around the business behind it.

Begin with your operation

Your client relationships, operating priorities and existing systems inform the discussion. We consider how Copy Trading Solution should fit into the way your brokerage works.

Make the whole experience coherent

Strategy information, account configuration and ongoing controls should feel connected. Clear interfaces and deliberate integration help bring those relationships together.

Your brokerage. A connected experience.

Bring Copy Trading Solution to your clients.

Explore a strategy connection shaped around your brokerage, your accounts and your clients.

Let's walk through your offering

Tell us how you want to organise providers, connect accounts and present Copy Trading Solution to your clients. We will review the product with your team and define the deployment around your operation.

Connect with Paperbot

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