

## **xChief Copy Trading Platform User Guide**

**Note:** Receiving and using the \$100 No-Deposit Bonus, \$500 Welcome Bonus, or Trading Credit is prohibited for both the Follower and the Provider. If you claim any of the above, you agree to the company's right to delete your account from the Copy Trading System and all profits made in this account without stating a reason. Please also note that this service is available for all standard trading accounts on both MetaTrader 4 and 5.

### **• Definition of a Copy Trading Account:**

Copy trading is a feature on trading platforms that allows traders to copy the trading position and portfolio of professionals. This method is one of the best investment strategies for beginners and inexperienced traders with little financial market experience.

### **• Definition of “Follower”:**

Followers are users who intend to follow a trader and copy their trades. To use the xChief Copy Trading platform, followers must have a standard trading account (corresponding to the signal provider's account) - either a pre-existing one or a newly created one - and register as a 'Follower' on the platform.

### **• Definition of “Provider”:**

Providers are traders with a positive performance history on xChief who are registered as Signal Providers on the xChief Copy Trading Platform.

**Note:** The minimum balance to sign up, whether as a follower or as a provider, is \$200.

## Registering as a Follower

Before copying trades, you're required to open a standard trading account and to top it up with at least \$200. Next, you should register as a Follower on the xChief Copy Trading Platform using one of the following methods:

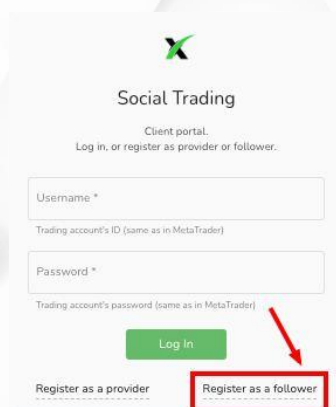
1. Registering through the platform directly by pressing the "Register as a Follower" button.
2. Registering via the link sent by the provider.

The registration processes and how the required settings are to be applied are explained below.

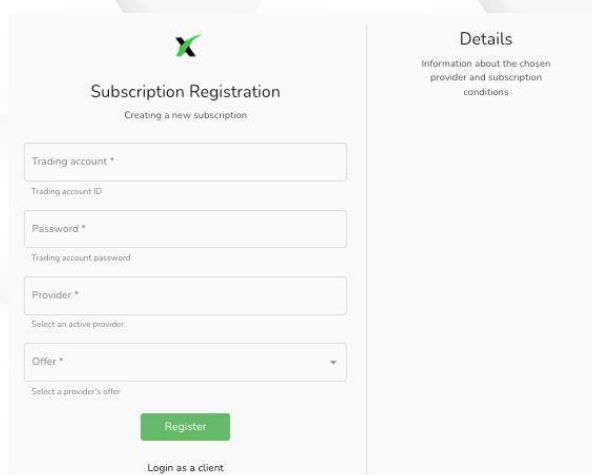
### • Direct Registration

To register directly on the xChief Copy Trading platform, follow these steps:

1. Create a standard trading account in your Personal Area's "My Accounts" section.
2. After creating a trading account, you will receive an email from xChief containing the trading account number, MetaTrader master password, and investor password.



3. Click the "Register as a Follower" option in the account section.
4. On the next page, enter the required information.



- Enter your trading account number.
- Enter the master password of your Copy Trading account.

*Note: Use MetaTrader's Master Password instead of your Investor Password.*

- Select the name of the provider you want to follow.
- Select the profit-sharing offer.
- Click on "Register".


5. Next, apply the desired settings, click the "Actions" option, and select the "Enable" option.

**Note:** Before activating your Copy Trading account, ensure the Risk Management and Funds Management settings have been applied. If these settings are not applied, the system will take action automatically.

### • Register via link

Providers who make specific offers or set their Provider accounts private may send potential followers a registration link. To register via the registration link, follow these steps:

1. First, create a standard trading account and deposit at least \$200.
2. Then, click on the link sent by the provider.
3. The "Create Subscription" page displays information about the Provider, including potential fees.
4. Enter your trading account ID.



### Create Subscription

Trading information about the new subscription

Trading account \*

Trading account ID

Password \*

Trading account password

Register

[Login as a client](#)

### Details

Information about the chosen provider and subscription conditions

PROVIDER

Nickname

Visibility

Public

OFFER

Title

<small>Performance fee</small>	50% (Weekly)
<small>Management fee</small>	\$50.00 (Monthly)

5. Enter the master password of your trading account.

*Note: Use MetaTrader's Master Password instead of your Investor Password.*

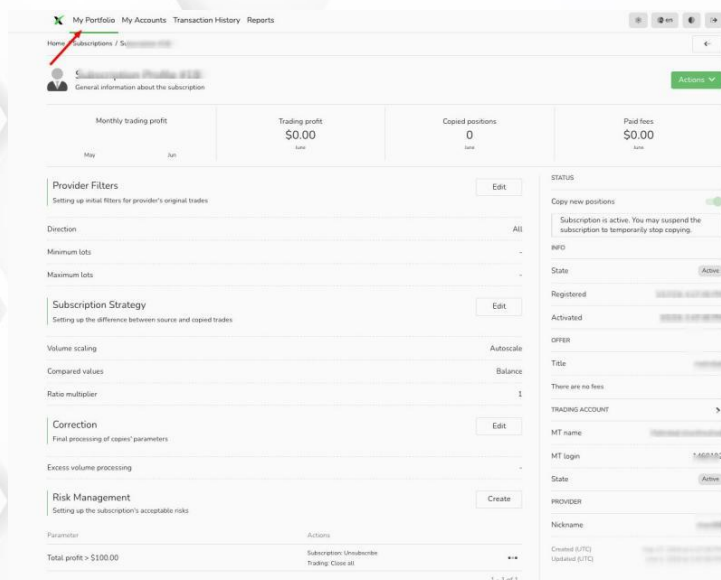
6. Click on "Register".

7. Next, apply the desired settings, click the "Actions" option, and select the "Enable" option

*Note that you cannot follow the Provider before depositing the minimum required amount into your trading account.*

## • Account Settings

After following a provider, you can use various settings to align the provider's strategy with your desired strategy.



The screenshot shows the 'Subscription Filters' page in the XChief interface. It includes a navigation bar with 'My Portfolio', 'My Accounts', 'Transaction History', and 'Reports'. The main content area is divided into several sections: 'Monthly trading profit' (May: \$0.00, Jun: \$0.00), 'Trading profit' (May: \$0.00, Jun: \$0.00), 'Copied positions' (0), and 'Paid fees' (May: \$0.00, Jun: \$0.00). Below these are four main settings sections: 'Provider Filters' (Direction: All, Minimum lots, Maximum lots), 'Subscription Strategy' (Volume scaling: Autoclose, Compared values: Balance, Ratio multiplier: 1), 'Correction' (Final processing of copied parameters), and 'Risk Management' (Setting up the subscription's acceptable risks). A table at the bottom shows 'Parameter' and 'Actions' for 'Subscription Unsubscribe' and 'Trading Close at'. The right sidebar shows 'STATUS' (Copy new positions: On), 'INFO' (State: Active, Registered, Activated), 'OFFER' (Title), and 'TRADING ACCOUNT' (MT name, MT login, State, PROVIDER, Nickname).

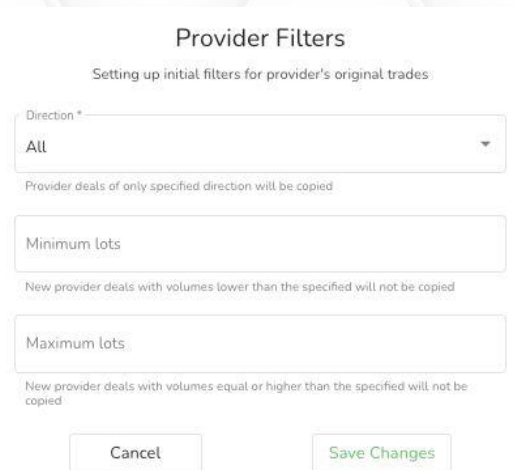
These settings are divided into different sections, which are:

- Provider Filters
- Subscription Strategy
- Correction
- Risk Management

Each of these sections is explained separately below.

## • Provider Filters

In this section, you can filter the provider's signals, ensuring only the defined trades are copied. This filter can be specified using the following two parameters:



The screenshot shows the 'Provider Filters' form. It has a title 'Provider Filters' and a subtitle 'Setting up initial filters for provider's original trades'. The form contains three input fields: 'Direction \*' (a dropdown menu with 'All' selected), 'Minimum lots', and 'Maximum lots'. Below each field is a descriptive text: 'Provider deals of only specified direction will be copied', 'New provider deals with volumes lower than the specified will not be copied', and 'New provider deals with volumes equal or higher than the specified will not be copied'. At the bottom are two buttons: 'Cancel' and 'Save Changes'.



## • Minimum lot size

The “Minimum lot size” setting ensures that any trades opened will be copied only if the lot size exceeds the defined amount. For example, if you set this amount to 0.01, trades greater than 0.01 lots can be copied to your account. If you want to copy trades equal to 0.01, set the value lower to, for example, 0.009. Positions opened with the number set here or lower will not be copied.

## • Maximum lot size

Conversely, the “Maximum lot size” setting specifies that any trades copied must be lower than the lot volume set here. For example, if you set this amount to 0.01 lots, trades equal to or over will not be copied, while trades below this amount will be copied.

### Example:

If your settings in the “Provider Filter” section are as follows:

Minimum lot size: 0.02

Maximum lot size: 0.1

If your provider opens trades with the following lot size:

- First Trade’s Lot Size: 0.01
- Second Trade’s Lot Size: 0.02
- Third Trade’s Lot Size: 0.05
- Fourth Trade’s Lot Size: 0.1
- Fifth Trade’s Lot Size: 0.2

Then, none of the trades, except the third trade, will be copied to your account, as they all equal or exceed your maximum or minimum lot size settings. However, the 3<sup>rd</sup> trade with a lot size of 0.05 would be copied, as it exceeds your minimum but not your maximum desired lot size.

## • Subscription Strategy

The Subscription Strategy section lets you choose the volume of trades to be copied and determine the settings for copying trades, differentiating the behavior of your account from that of the provider's account. Below are the different options and settings within the “Subscription Strategy” section:

### • Autoscale

The “Autoscale” option determines the volume of copied trades by calculating the ratio of your capital to the provider's capital. You can choose the volume of copied trades in your account by specifying the parameters and the ratio coefficient.

**Subscription Strategy**

Setting up the difference between source and copied trades

Volume scaling \*

Autoscale

*Autoscale* - The ratio of a copy's volume to the original volume is equal to the ratio of the follower's and provider's Compared values. The result is then multiplied by the Ratio multiplier.  
*Multiply* - A copy's volume is equal to the provider's original volume multiplied by the Volume multiplier.  
*Fixed* - Copied volumes are always equal to the specified Copied volumes.  
*Lots proportion* - A copy's volume is calculated as the whole number of Lots steps in the follower's Compared value, multiplied by Volume per step.

Compared value \*

Balance

The value to compare between the provider and follower accounts. Their ratio will be equal to the ratio of source and copied deals' volumes.

Ratio multiplier \*

1

Number to multiply the Compared values' ratio by

Cancel

Save Changes

### Example 1: The follower's balance is less than the provider's

Suppose the follower's account balance is \$1000, and the provider's is \$5000. Also, assume the ratio coefficient is 1. Since the follower's balance is one-fifth of the provider's balance, if the provider opens 1 lot, the follower will open one-fifth of that lot, i.e., 0.2 lots, multiplied by the ratio coefficient (which is 1 in this case). Therefore, the follower's account copies 0.2 lots.

If we change the ratio coefficient to 4, the follower's account will copy the trade with 0.8 lots ( $0.2 \times 4 = 0.8$ ). Conversely, if the ratio coefficient is set to 0.4, the account copies 0.08 lots, as  $0.2 \times 0.4 = 0.08$ .

### Example 2: The follower's balance is more than the provider's

Suppose the follower's account has a balance of \$5000, and the provider's account has a balance of \$1000. Also, assume the ratio coefficient is 1. Since the follower's balance is five times that of the provider's, if the provider opens 1 lot, the follower will copy 5 times that lot, i.e., 5 lots, multiplied by the ratio coefficient (which is 1 in this case). Therefore, the follower's account copies 5 lots.

If we change the ratio coefficient to 4, the follower's account will copy the trade with 20 lots ( $5 \times 4 = 20$ ). Conversely, if the ratio coefficient is set to 0.4, the account copies 2 lots ( $5 \times 0.4 = 2$ ).

## • Multiply

With the "Multiply" option, your trading volume is determined according to the coefficient you set, regardless of your balance or the provider's balance. Below are three clarifying examples of using the "Multiply" option:

### Subscription Strategy

Setting up the difference between source and copied trades

Volume scaling \*
 

Multiply

*Autoscale* - The ratio of a copy's volume to the original volume is equal to the ratio of the follower's and provider's *Compared values*. The result is then multiplied by the *Ratio multiplier*.  
*Multiply* - A copy's volume is equal to the provider's original volume multiplied by the *Volume multiplier*.  
*Fixed* - Copies' volumes are always equal to the specified *Copies' volumes*.  
*Lots proportion* - A copy's volume is calculated as the whole number of *Lots steps* in the follower's *Compared value*, multiplied by *Volume per step*.

Volume multiplier \*
 

1

Number to multiply the provider's volume by for a copy

Cancel

Save Changes

### Example 1: The coefficient is equal to 1

A coefficient of 1 can be thought of as copying the provider's trades at a ratio of 1:1. Therefore, a trade of 1 lot will be copied as 1 lot, and a trade of 0.1 lots will be copied as 0.1 lots.

### Example 2: The coefficient is equal to 3

With a coefficient of 3, you will copy the provider's trades at a ratio of 3:1. Therefore, a trade of 1 lot would be copied as 3 lots, and a trade of 0.1 lots would be copied as 0.3 lots.

### Example 3: The coefficient is equal to 0.1

A coefficient of 0.1 will copy 10% of the provider's trading volume. In other words, if the provider initiates a trade at 2 lots, your trade would be executed with 0.2 lots.

## • Fixed

With the Fixed strategy, the provider's trades will be copied at a fixed lot volume, regardless of the provider's trading volume. Below are two clarifying examples:

**Subscription Strategy**

Setting up the difference between source and copied trades

Volume scaling \*

Fixed

Autoscale - The ratio of a copy's volume to the original volume is equal to the ratio of the follower's and provider's Compared values. The result is then multiplied by the Ratio multiplier.  
 Multiply - A copy's volume is equal to the provider's original volume multiplied by the Volume multiplier.  
 Fixed - Copies' volumes are always equal to the specified Copies' volumes.  
 Lots proportion - A copy's volume is calculated as the whole number of Lots steps in the follower's Compared value, multiplied by Volume per step.

Copies' volumes \*

1

Volume to be opened on each copy

### Example 1: The volume is equal to 2

With a fixed volume of 2 lots, all trades will be copied using 2 lots, regardless of the provider's trading volume or balance. In other words, if the provider initiates one trade with 1 lot and another with 3 lots, both trades will be copied using 2 lots.

### Example 2: The volume is equal to 0.01

In this case, the provider's trades are copied at 0.01 lots per trade. In other words, if the provider initiates one trade with 1 lot and another with 3 lots, both trades will be copied using 0.01 lots.

## • Lots proportion

In this strategy, the trading volume is determined by your account balance and the coefficient you set, regardless of the provider's balance or trading volume. Here's an example to illustrate this method:

**Subscription Strategy**

Setting up the difference between source and copied trades

Volume scaling \*

Lots proportion

Autoscale - The ratio of a copy's volume to the original volume is equal to the ratio of the follower's and provider's Compared values. The result is then multiplied by the Ratio multiplier.  
 Multiply - A copy's volume is equal to the provider's original volume multiplied by the Volume multiplier.  
 Fixed - Copies' volumes are always equal to the specified Copies' volumes.  
 Lots proportion - A copy's volume is calculated as the whole number of Lots steps in the follower's Compared value, multiplied by Volume per step.

Compared value \*

The fund of the Lots step. The copied volume will be a result of multiplying the Risk ratio by the quantity of full Lots steps in the chosen fund of the follower account.

Volume per step \*

1

Multiplicator for Lot step

Default step \*

0 \$

Number to multiply the Compared values' ratio by



Let's assume that the follower's balance is \$5,000 and that the lot step has been set at \$1,000 with the volume per step set at 0.1 lots. The follower's trading volume will be determined according to his total steps, which in this case is 5, as  $\$5,000 \div \$1,000 = 5$ . Since every copied trade is executed with a formula of "Steps  $\times$  Volume Per Step", any trades opened by the provider would be copied at 0.5 lots ( $5 \times 0.1 = 0.5$ ). This also means that should the follower gain profit or incur losses, the volume of future trades may change. This is illustrated in the following examples:

**Example 1: The follower gains \$1,000**

Since the follower has gained \$1,000, his total balance is now \$6,000. With the lot step set at \$1,000, the total steps have increased to 6, as  $\$6,000 \div \$1,000 = 6$ . Therefore, any future trades would be copied at 0.6 lots ( $6 \times 0.1 = 0.6$ ).

**Example 2: The follower loses \$1,000**

Since the follower has lost \$1,000, his total balance is now \$4,000. With the lot step set at \$1,000, the total steps have decreased to 4, as  $\$4,000 \div \$1,000 = 4$ . Therefore, any future trades would be copied at 0.4 lots ( $4 \times 0.1 = 0.4$ ).

**Example 3: The follower gains or loses under \$1,000**

As the lot step has been set at \$1,000, the steps used for copying trades will not change if the gains are under \$1,000. For example, a gain of \$700 would increase the follower's balance to \$5,700, which cannot be divided by \$1,000 (his set lot step), and would therefore still be counted as 5 steps.

Conversely, a loss of \$700 would decrease the total balance to \$4,300, which would mean that future trades would be copied at 0.4 lots per trade (since  $\$4,300 \div \$1,000 = 4.3$ , rounded down to 4 steps).

• **Correction**

In this section, you can specify the maximum lot volume to be copied to your account and how to handle trades that exceed this volume. This limit can be set in a field called "Max Open Volume". There are 2 options to determine how trades are executed when they exceed this specified volume. In the "Action" field, choose one of the following methods:



• **Rejection:** If the lots volume exceeds the value defined in the "Max Open Volume", that trade will not be copied to the Follower's account.

• **Scale reduction:** The volume copied to the Follower's account will be equal to the value entered in the "Max Open Volume" section. For example, if you set this value to 0.05 lots and the provider opens a trade of 0.08 lots, only 0.05 lots will be copied to your account.

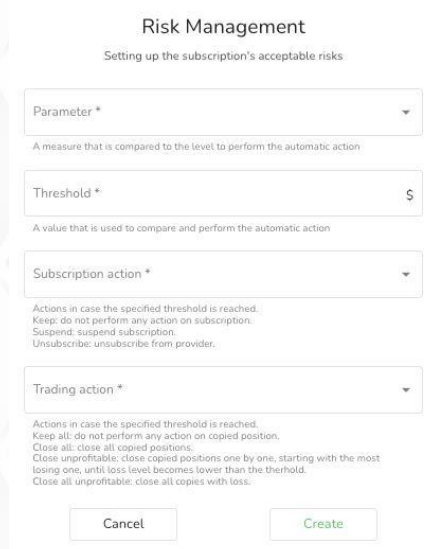
**Note:** This correction applies to the volume of each copied trade.

There may be cases where, for example, the "Autoscale" strategy results in a very large lot being copied to the Follower's account, especially when the Follower's account balance is significantly higher than the Provider's account balance. In such situations, the Follower can manage their account against these risks by securely setting the maximum volume they can handle. This ensures they do not copy more volume than they can safely manage.



## • Risk Management

In xChief Copy Trading Platform, you can always control your account by setting your desired rules in the risk management section. Here, you can set the maximum risk of your capital or specify that your subscription will be automatically canceled or suspended once your desired profit amount is achieved. Additionally, you can manage how copied trades are handled in your account.



**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

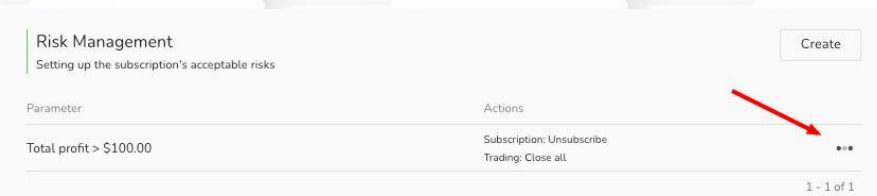
Subscription action \*  
Actions in case the specified threshold is reached:  
Keep: do not perform any action on subscription.  
Suspend: suspend subscription.  
Unsubscribe: unsubscribe from provider.

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

To set these parameters, click on the "Create" button and select the rules you want to apply.

Keep in mind that any parameter you specify will be added to the list of parameters, from which you can edit or delete it at any time. To do this, click on the three dots (...) next to the listed parameter and select the desired option.



**Risk Management**  
Setting up the subscription's acceptable risks

Parameter	Actions
Total profit > \$100.00	Subscription: Unsubscribe Trading: Close all

1 - 1 of 1

The platform offers the possibility to set three different parameters in the risk management section. Below is more information on each parameter:

### 1) Total Loss

The total loss is the sum of losses incurred since you began your subscription with a specific provider. When the total loss of your account reaches the amount, you've set in the "Threshold" section, the platform will take action according to your settings after the closing of each trade. Please note that this type of Stop-Loss is only reviewed after trades are closed and does not affect open trades.

### 2) Floating loss

The Floating Stop-Loss is the sum of losses from all currently open copied trades for a specific provider. This amount changes instantaneously and is visible in your account. When the floating loss of your account reaches the amount, you've set in the "Threshold" section, the platform will take action on your open trades according to your settings. This type of Stop-Loss only applies to open trades and does not consider trades already closed at a profit or loss.

It should be noted that the performance of the floating Stop-Loss is currently checked at one-minute intervals, during which the amount of loss may temporarily exceed the set threshold. Furthermore, if a large number of lots are copied to your account during short periods of market fluctuations, it can result in significant changes in your account balance. This will cause fluctuations in your floating loss, potentially diverging from your set floating loss amount.

Also, please note that the “Risk Management” and “Floating Stop-Loss” sections are designed to manage all trades copied to your account, making them unsuitable for managing losses on individual trades. If you want to manage the Stop-Losses of your trades individually, it is recommended to use the “Stop-Loss” option on your MetaTrader platform.

### 3) Total Profit

The total profit limit is the sum of the profits accrued in your account from the trades of a particular provider. When the total profit of your account reaches the defined amount, you’ve specified in the “Threshold” section, the platform will take actions according to your settings. Please note that this type of profit limit is checked only after trades are closed and does not affect open trades.

#### • Threshold

The threshold setting determines, in USD, when the specified parameter will be activated in your account. For example, if you set a floating Stop-Loss threshold of \$200, the platform will take action based on your settings when your floating loss on open trades reaches \$200.

#### • Subscription action

The Subscription Action determines how your subscription changes according to your settings. There are three possibilities:

##### 1. Unsubscribe

If this option is selected, you will no-longer be subscribed to the provider if a specific parameter, such as total loss, is activated.

##### 2. Suspend

With the “Suspend” option, once a specific parameter, such as total loss, is activated, no trades from this provider will be copied until you reactivate the subscription.

##### 3. Keep

If you choose this option, your subscription will remain active, and new transactions will continue to be copied to your account.

***Note:** In all three methods, if there are open trades from this trader in your account, they will be handled according to the option you specify in the next section, "Trading Action".*

## • Trading action

In this section, you can specify how open trades are updated when specific parameters, such as your Floating Loss threshold, are activated. There are three options available:

### 1. Maintain all trades

If this option is selected, open trades will remain open in your account, but the copy trading platform will no longer be involved, and you must control your trades manually in MetaTrader.

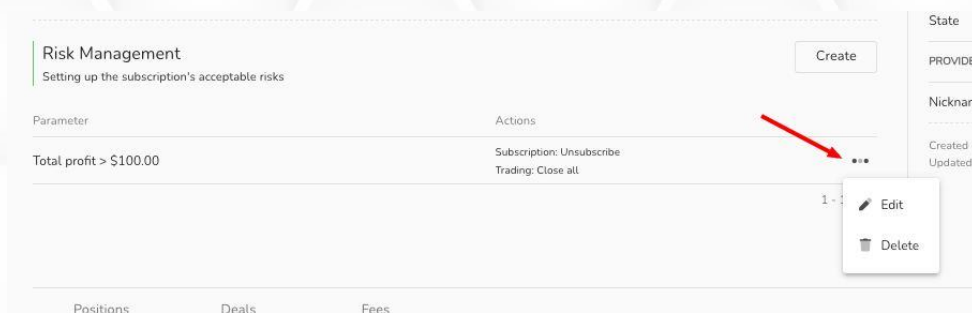
### 2. Close All Trades

If this option is selected, all open trades will be closed, whether they are in profit or at a loss.

### 3. Close all losing trades

If this option is selected, only the trades that are at a loss will be closed and the trades on profit will remain open in your account.

**Note:** Be very careful when defining risk management rules, as they may interfere with the trader's strategy. In some cases, your trades might be closed at a loss while the trader's trades eventually close at a profit. To edit or delete a parameter you have defined, click on the three dots (...) next to the parameter, and select the "Edit" option to make changes or the "Delete" option to remove the parameter.



Here are some clarifying examples:

**Example 1:** Suppose you set the parameter as follows:

Parameter: Total loss

Threshold: \$200

Subscription Action: Suspension

Trading Action: Close All

Let's presume you've incurred total realized losses of 190\$ and that you have three open trades in your account with the following conditions:

Position 1: Open trade with a loss of \$15

Position 2: Open trade with a loss of \$24

Position 3: Open trade with \$30 profit

In this case, if you close trade 1, the total loss of your account from this trader would be \$205, activating the total loss parameter. This would then automatically close both remaining trades and will suspend your subscription.

**Example 2:** Suppose you set the parameter as follows:

Parameter: Floating Loss

Threshold: \$150

Subscription Action: Unsubscribe

Trading Action: Closing All Losing Trades

Let's also presume you have the following trades open:

Position 1: Open trade with a loss of \$70

Position 2: Open trade with a loss of \$120

Position 3: Open trade with \$30 profit

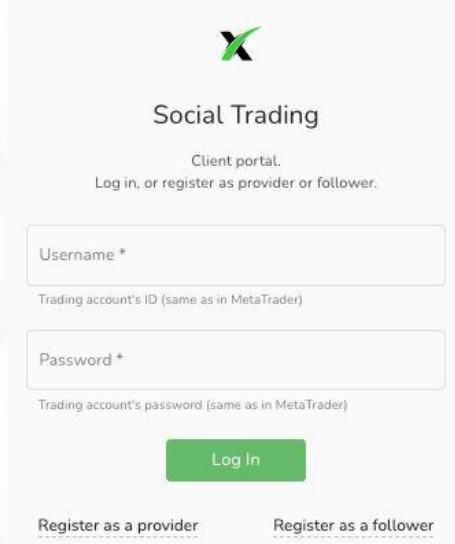
Now your floating loss with this trader has reached \$190, activating the parameter, closing all losing positions, and unsubscribing your account from the provider's signals. However, as position #3 is in profit, it will remain open, but it will no longer be controlled by the copy trading platform. Instead, you must control that position via your MetaTrader dashboard.

### • Copy Trading Account Login

After registering as a follower, you will need to log in to your copy trading account with xChief to access your subscription settings and view the copied trades in your account. To do this, follow these steps:

- Click on the Copy Trading menu in your xChief Personal Area.
- Log in with your copy trading account number and the master MetaTrader password from the account section.

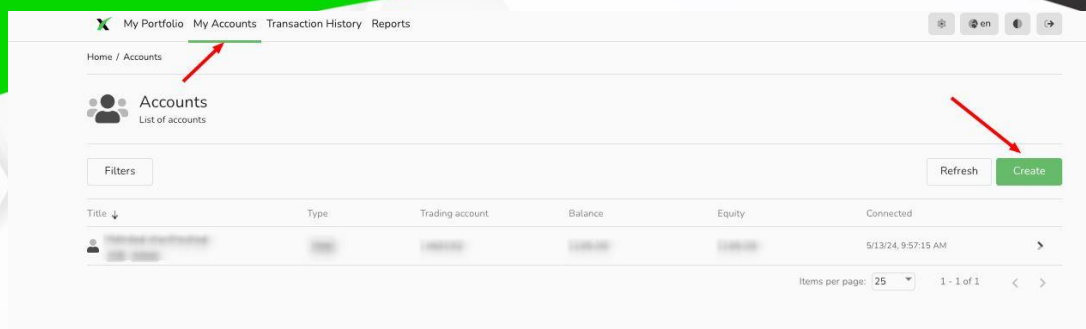
You can now view the signals you've followed at the bottom of the page.



The screenshot shows the 'Social Trading' client portal login page. At the top is the xChief logo. Below it, the text 'Social Trading' is centered, followed by 'Client portal.' and 'Log in, or register as provider or follower.' There are two input fields: 'Username \*' and 'Password \*'. Below the password field is a note: 'Trading account's password (same as in MetaTrader)'. A green 'Log In' button is centered below the fields. At the bottom, there are two links: 'Register as a provider' and 'Register as a follower'.

**Note:** If you have more than one copy trading account and want to access all your accounts at the same time, follow these steps: Log in to your copy trading account, select "My Accounts" from the menu above, and click on the "Create" option at the top right of the page. Next, add your other account(s).

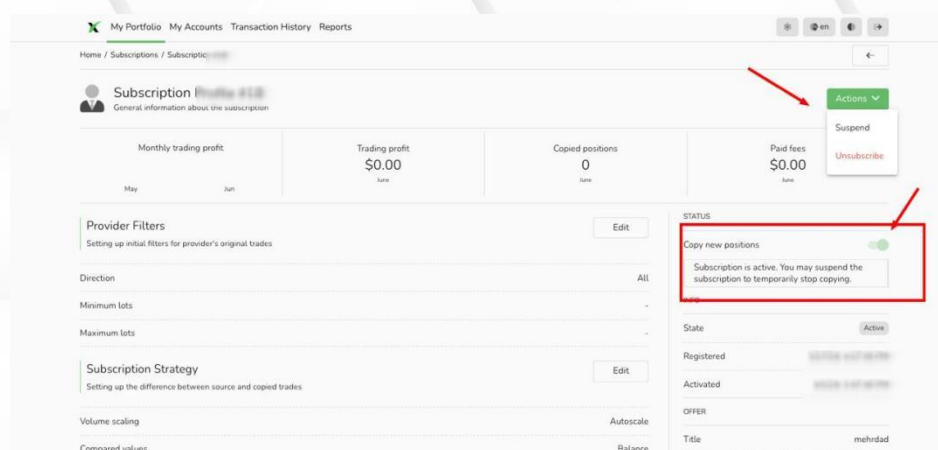




### • Activating a Follower account

Now that you have set up your copy trading settings, you can activate your copy trading subscription to start copying the provider's trades to your account. To do this, first log in to your copy trading account, then click on the “Actions” option, and select the "Enable" option.

You will then need to choose whether to copy the provider's currently open trades or only their new trades. The two options are:



### • Copy

This option will copy all the provider's currently open trades to your account.

### • Ignore

This option will only copy new trades that the provider opens after you activate your subscription.

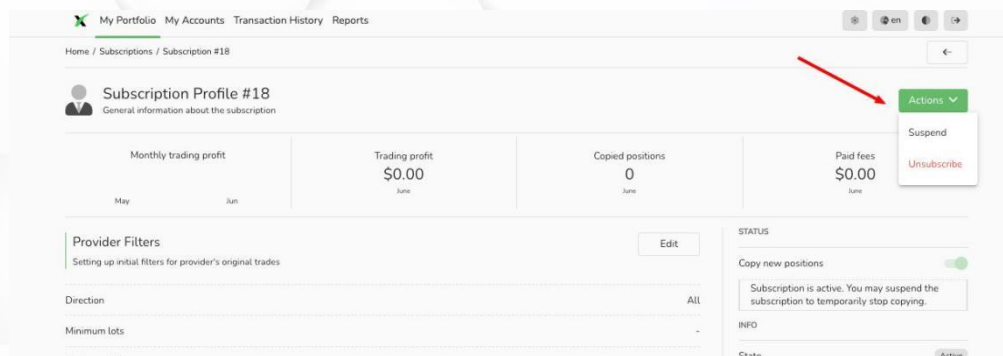
Finally, click the "Activate" button to activate your follower account and to copy the trades to your account.

### • Suspend Copying of Provider's Trades

You can temporarily suspend your subscription, disabling the copying of a specific provider's trades. To do this, navigate to your copy trading panel's Personal Area, click on the “Actions” option, and select the "Suspend" option from the list that opens.

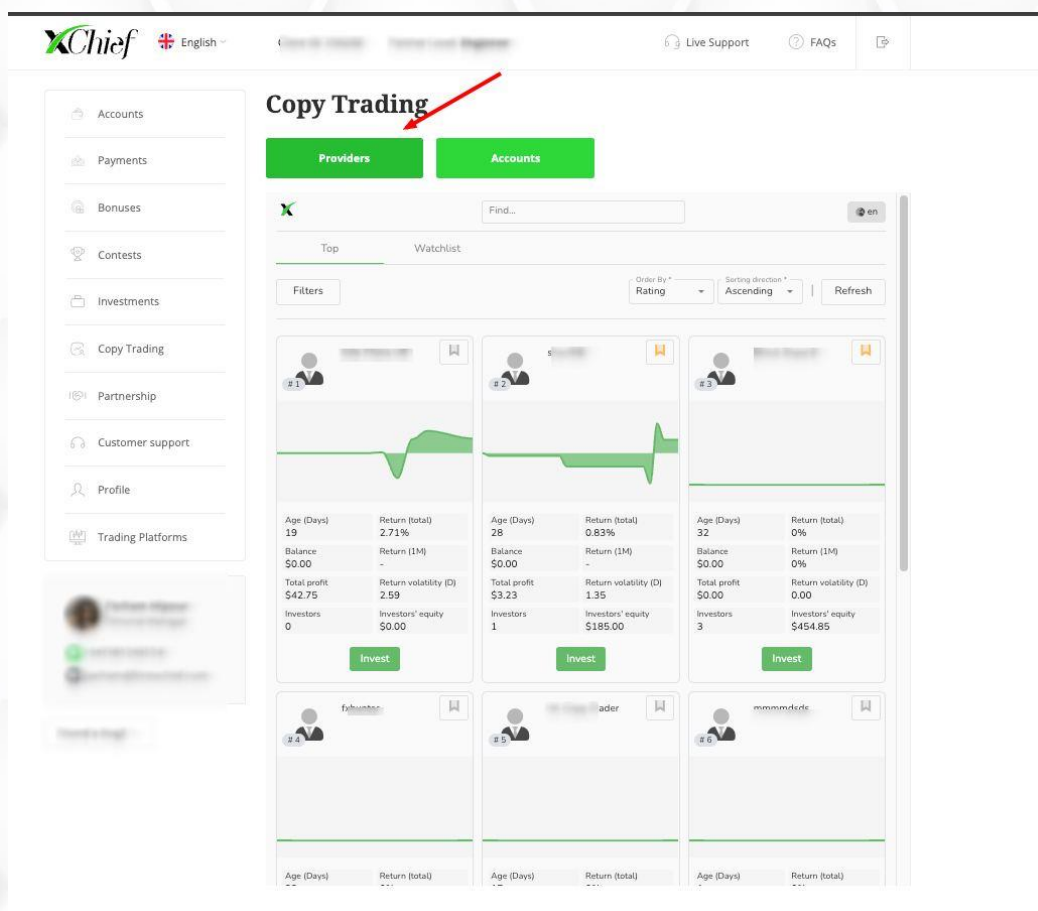
## • Unsubscribe from Provider's signals

This option fully unsubscribes your account from the provider's signals. To do this, navigate to your copy trading panel's Personal Area, click on the "Actions" option, and select the "Unsubscribe" option from the list that opens.



## • List of General Providers

This list shows all providers on the xChief Copy Trading platform who offer public signals. These providers have trading accounts with xChief and have been evaluated by the platform. Their performance history can be viewed in several ways, which will be explained below.



## • View and filter the list of providers

To view the list of providers available on the xChief Copy Trading platform, first enter the “Copy Trading” section via your Personal Area. Then, select the “Providers” option from the top menu, which will open up a page with the list. Please note that you can only see the list of publicly active providers in this section.

## • Provider List Table

Here, you can view specific information on each provider, including their name and performance metrics. The displayed specifics include:

1. **The name of the provider:** The title assigned to the provider's account.
2. **Explanations and suggestions:** Any explanations or suggestions provided by the provider, such as how to follow them.
3. **Provider Performance Chart:** A graph showing the provider's performance and account fluctuations.
4. **Provider Rank:** The provider's rank is shown as a # sign with a number on the provider image.
5. **Return:** The provider's return on investment, shown as a percentage.
6. **Balance:** The provider's account balance, in USD.
7. **Investors' equity:** The total capital of all followers following this provider.
8. **Total Profit:** The total profit of the provider's account, shown in USD.
9. **Number of Investors:** The number of investors following this provider.
10. **Provider Account Age:** The number of days this provider has been active.

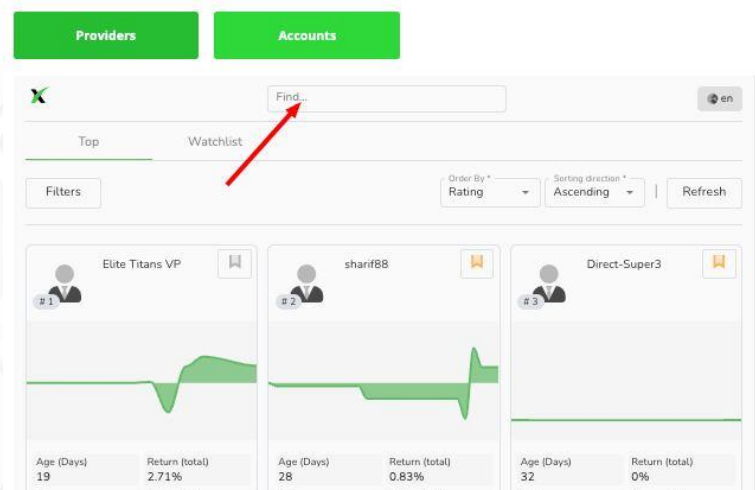


With this information, you can get a general view of the provider. If the provider fits your desired strategy, refer to the provider's history section for more in-depth information.

## • Provider Search

At the top of the page, there is a search field with the word “Find” written by default. If you know your chosen provider’s name, you can enter it here to search for the provider.

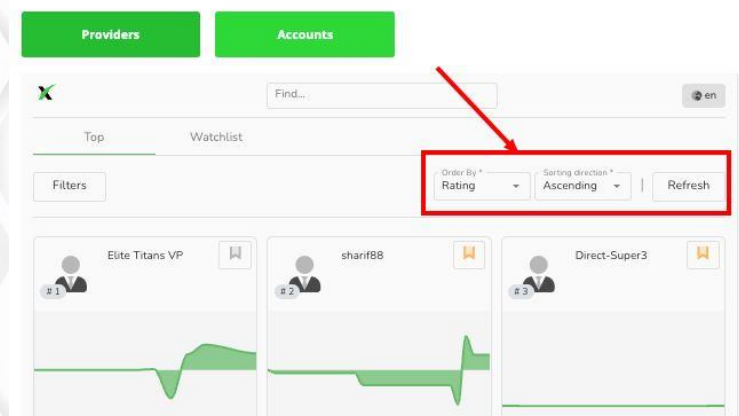
### Copy Trading



## • Sorting Providers

You can sort providers according to your preference using the “Sort” option. There are four sorting methods available:

### Copy Trading

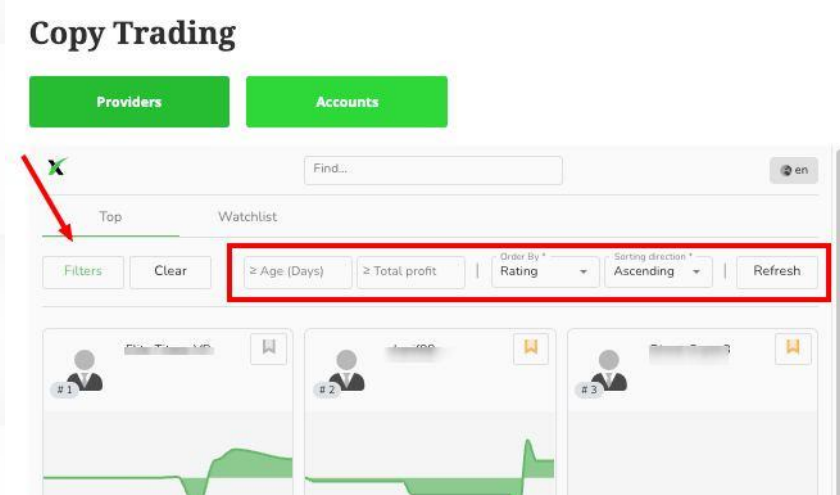


- I. **Duration of the Provider's Activity:** With this option, you can sort providers according to their activity duration, either from the longest to shortest or from the shortest to longest.
- II. **Total Profit:** The Total Profit selection sorts providers according to the total profit accrued, either from the least to the most or vice versa.
- III. **Number of Investors:** This option allows you to sort providers by the number of followers, either from the most to the least or vice versa.
- IV. **Ranking:** By selecting this option, you can sort providers based on their ranking. You can choose to display providers with the highest ranking first or in the reverse order.



## • Filter Provider

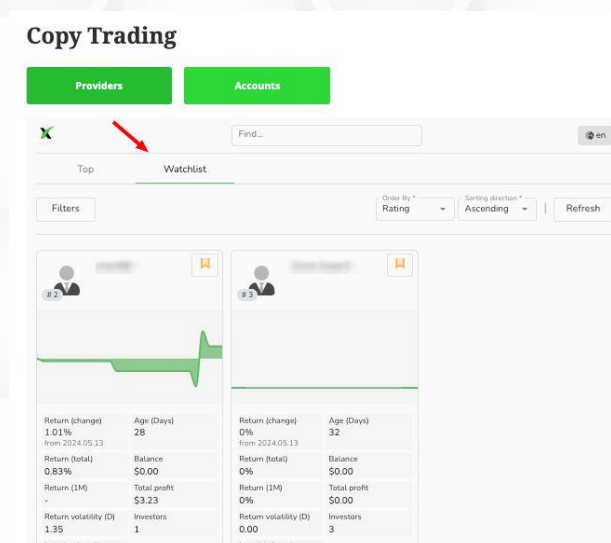
If you select the "Filter Provider" option, you will be presented with two filtering options. These options are:



- I. **Total Profit:** The Total Profit filter allows you to filter out providers whose total profit is less than the value you choose. For example, if you want to find a provider that has made a profit of at least \$1,000, you can enter the number 1000 in this field and press the "Refresh" button to update the list.
- II. **Duration of Provider Activity (Age):** This filter shows providers who have been active for at least the number of days specified. For example, if you enter the number 100, the filter will only show providers who have been active for at least 100 days.

## • Watch List

If you need time to evaluate providers or want to keep tabs on your favorite ones, you can add them to your watch list. To do this, click on the rectangle next to the name of your chosen provider in the top right corner. The rectangle will change to orange, indicating that the provider has been added to your watch list.

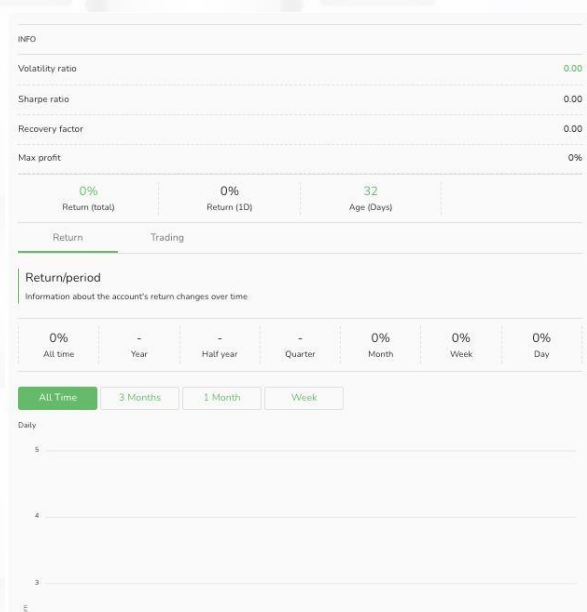


To view your watch list, go to the home page and select the "Watchlist" option under the "Find" section in the menu. This will open a list of all the providers you have added to your watch list.

If you want to remove a provider from your watch list, click on the "Watchlist" button again on the same page where the list of providers is displayed to remove them from the list.

### • Provider performance history

Once you've conducted a general overview of potential providers, you may want to examine a specific provider in more detail. Visiting the provider's dedicated page can help you choose the one that best matches your desired strategy based on the detailed information available. To view the provider's dedicated page, click on the provider's name. If the provider has provided a specific explanation about themselves or their trading methods, it will be displayed below their name. Following this, the "Information" section presents general information such as "Volatility ratio", "Recovery factor", and "Max profit".



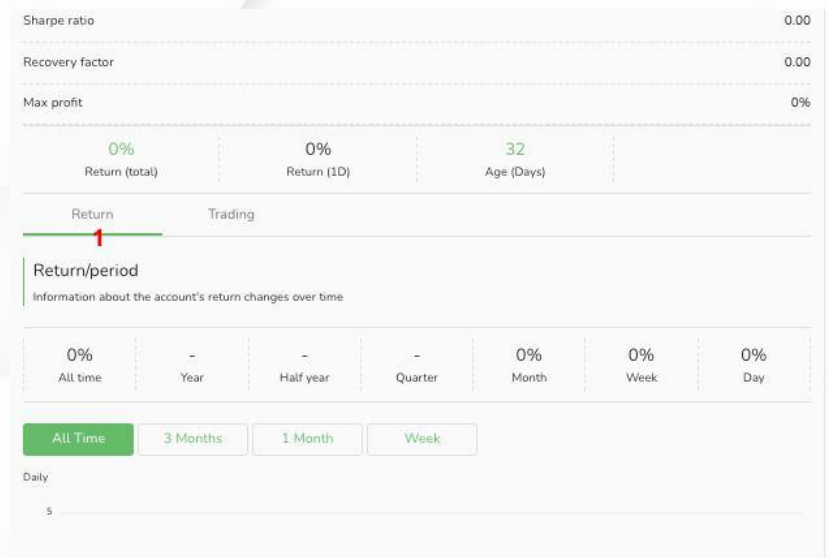
After this section, the following additional information about the provider's performance is shown:

1. **Return (total):** Which indicates the provider's total return on investment, shown as a percentage.
2. **Provider Activity Period (Age):** This section shows the trader's activity period in days.
3. **Absolute Profit:** This shows the total profit of the provider's account in USD.
4. **Maximum Profit:** Here you can view the maximum profit made by the provider, which is shown in percentages.
5. **Registration Date:** Displays the provider's account registration date.

Following the above information, two additional sections, “Return/Period” and “Trading,” are available. Next, we’ll have an in-depth look at them:

## 1. Return/Period

This section consists of two parts; the “Return/Period” and the “Monthly” subsections.

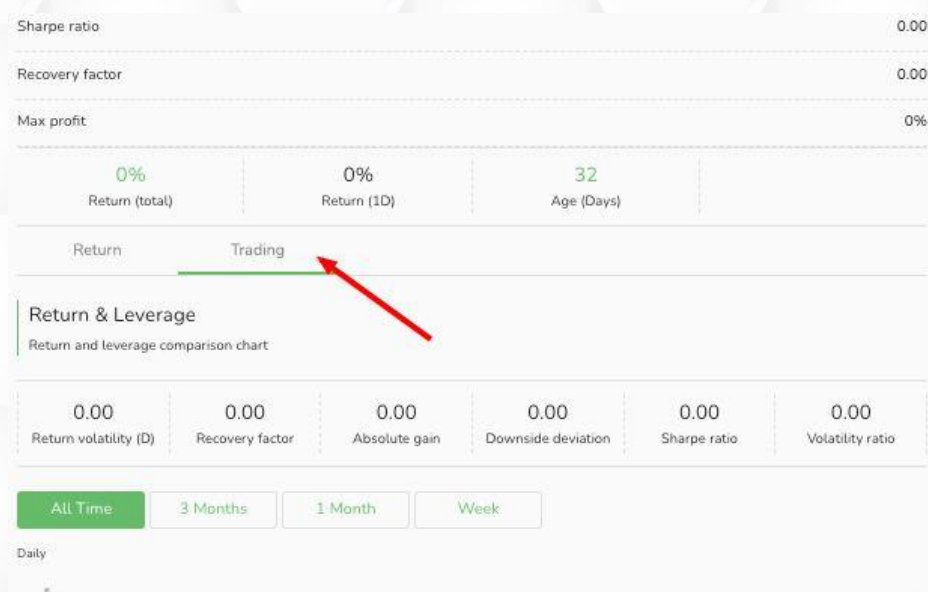


In this section, information about the return on capital and the recurring deviation in different periods of time, such as the entire period, annual, monthly, etc. are shown separately. A graph displays the return on investment over the specified time periods.

### • Monthly

Here, information such as the average return on investment over specific periods is shown as a percentage. These values are then displayed in a bar chart across different months.

## 2. Trading



• **Returns and Leverage:** This section shows the information of the trader's history in six different factors:

• **Return Volatility:** The reversal volatility indicates how risky the trader's strategy is. The higher the volatility, the higher the trader's profitability or loss. The calculation method is exponential, and even if the trader is able to fully recover from a heavy loss, the trader's volatility will still be high.

• **Recovery factor:** The recovery factor indicates how well the trader has recovered from losses. A value of 1, means full recovery, while a value less than 1, means the funds have not been fully recovered.

• **Absolute gain:** Shows the total profit earned by the trader.

• **Downside Deviation:** Measures negative risk by focusing on returns that fall below a defined threshold or minimum, emphasizing the volatility and negative risk of the trader's strategy.

• **Sharpe Ratio:** Represents the profit of an investment compared to its level of risk.

• **Volatility ratio:** Indicates the calculated average amount of daily return.



## Concepts related to the Provider

Signal providers are traders who have an account with xChief, a positive performance history, and are registered as providers on the copy trading platform. Providers are traders who have the ability to analyze the market and have excellent trading skills. By copying their trades, followers have a higher chance of making profits.

### • Register as a provider

To provide signals on the xChief Copy Trading platform, you must follow these steps:

1. Register a trading account with xChief.
2. Create a standard trading account in your Personal Area.
3. Deposit at least \$200 into your account.
4. Click the "Copy Trading" option in your Personal Area and select the "Accounts" option.
5. Click the "Register as a Fund Manager" option.
6. Enter your trading account number.
7. Enter the Master Password of MetaTrader in your Copy Trading Account.
8. Enter a pseudonym that you want to use.
9. Click the "Register" option.

Next, fill in your Provider Profile information. This information includes:

### • General Information

- **Personal account details:** Introducing a summary of how it works, such as trading strategy, fund management, risk levels, and suggested settings.
- **Strategy:** Determining your trading strategy, Take-Profit and Stop-Loss methods, and signal copy status.
- **Finance:** Specifying the account, to which profits from fees must be deposited.
- **Set of subscription conditions:** Specifying terms of subscription and profit sharing.

*Note: Be sure to log in using the main MetaTrader password, instead of using the investor password.*

Keep in mind that the general details of your provider account will be displayed in the information section. This information includes:

- **Mode:** Shows as "Active" when your Provider account is active, and "Archived" if the account has been deleted.

## • Provider Account Registration Date

In the "Trading Account" section, the details of the trading account used to register the Provider Account will be displayed, including:

- Account Name in MetaTrader
- Trading Account ID
- Mode Account

Each of the account settings will be explained below.

## • Copy Trading Account Login

After registering as a provider, you will need to log in to your provider account to access your settings.

To do so, click the copy trading menu in your Personal Area and log in to the account section with the account number you have registered as a provider, and the master password of MetaTrader.

**Note:** If you have more than one provider account and want to access all your accounts at the same time, after logging in to your account, select "My Accounts" from the menu above. Next, click the "Create" option on the newly-opened page and add your other account(s) as usual.

### Common Information

Provider's common settings

Nickname \*

Provider's name to be displayed for followers.

Visibility \*

Public

Provider's availability for subscriptions.  
Public providers are available to subscribe from the client portal or leaderboards.  
Private providers are hidden and can be followed only via join links to their offers.

Show account name \*

Enabled

Show account name in the provider profile in the ratings

Cancel

Save Changes

## • Common Information

In this section, two parameters can be edited and defined, which are:

### 1. Nickname

In the Nickname section, you can set your account to be either public or private. If the account status is public, it will be shown to all potential followers in the list of providers in xChief's Copy Trading menu. This allows all followers to see your account and decide to follow it, enabling your trades to be copied to their accounts. However, if you set the account status to private, followers can only register using a private offer link. This setting is ideal for those who prefer to have a limited number of approved followers, as it prevents the account from being publicly displayed in the list of providers.

### 2. Personal Account Details

In this section, you can provide followers with more details about your account. For example, you can mention your suggested strategy or include links to your social media accounts. This helps your followers gain a better understanding of your trading approach and performance, while also establishing your presence on social media.

### Personal details of account

Description of trading strategy by its owner:

Summary

Provider's brief description visible publicly

**\*\*Text\*\*** - bold text

*\*Text\** - cursive text

[Google](https://google.com) - link

:heart: - emoji (https://www.webfx.com/tools/emoji-cheat-sheet/)

Summary preview

Notes

Provider's description (verbose) visible publicly

**\*\*Text\*\*** - bold text

*\*Text\** - cursive text

[Google](https://google.com) - link

:heart: - emoji (https://www.webfx.com/tools/emoji-cheat-sheet/)

Notes preview

Cancel

Save Changes

### 3. Strategy

The strategy section allows you to define your provider account's strategy with the following parameters:

### Strategy

Provider's settings of publishing deals

Hide stops \*

Share

Allow copying stop-levels of provider's trades into follower's trades

Strategy mode \*

All

Restriction of publishing deals depending on entering the market

Cancel

Save Changes

#### Hide stops

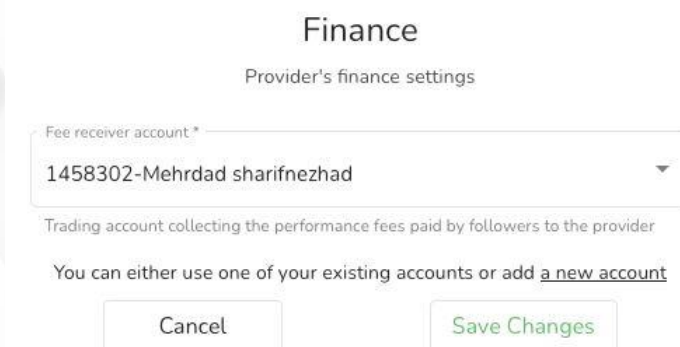
If this field is set to "Share", the Stop-Losses will be visible on the MetaTrader follower platform. If it is set to "Hide", these settings will not be visible but will still be copied by the followers.

#### Strategy Mode

If this field is set to "All", all opening and closing signals from the provider account will be copied by the follower. If set to "Exit Only", only the closing signals will be copied, while new trades from the provider will not be copied to the follower's account.

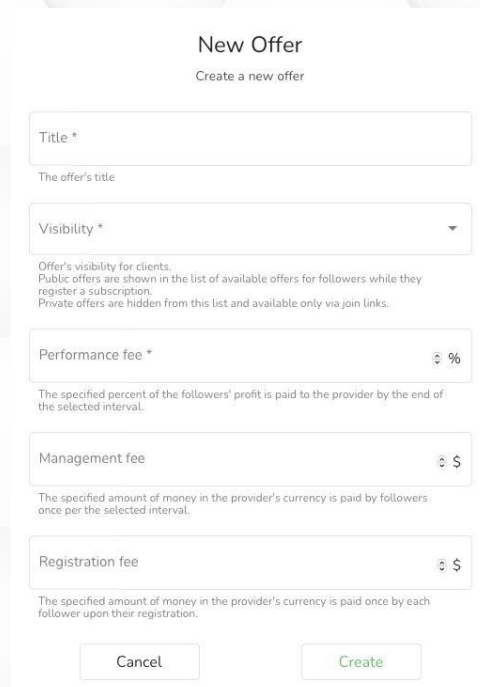
## 4. Finance

Here you can specify the receiving account for your provider fees. By default, the trading account you used when creating the provider account will be used. However, if you wish, you can designate another of your trading accounts for profit deposits. To do this, follow these steps:



- Open the "My Accounts" menu.
- Press the "Create" button, select the server of the secondary trading account, enter the account number and the main password of that account, and press the "Create" button. This will add the account number to the list of accounts.
- Go back to the "My Money Management Accounts" menu.
- Type your provider's name and click the "Finance" button in the Finance section of your Provider Account settings.
- After selecting the account from the list, click the "Save Changes" button

## 5. New Offer



A new offer defines the terms and percentage of the shared profit that providers can set in their provider account. The defined percentage indicates what percentage of the trading profit should be subtracted from the followers' profit and paid to the provider as income. Note that a provider can have multiple offers available simultaneously.



To create an offer, follow these steps:

1. Navigate to the "My Fund Management Accounts" section and click the "Create" button in the "Offers" section.
2. Enter the title of the offer, which will be shown to potential followers.
3. Specify whether your offer is visible to everyone (public) or only to those with a specific link (private).
4. Set the performance fee percentage.
5. Specify how often the performance fee is to be paid.
6. Set the management fee, in USD, and the payment interval.
7. Specify the registration fee, which is a one-time fee paid by the follower to the provider.

*Note that an offer can be created without specifying all of the above. For example, you may choose to only have a performance fee, but forego the management and registration fees.*

Each offer can be further tailored with additional settings, accessible by clicking on the name of the offer. These settings are explained below:

1. **Common Information** : Here, you can change both the name and status of the offer. Additional information can be added in the "Summary and Considerations" fields.
2. **Fees**: Use this setting to view and edit the desired performance fee percentage.
3. **Filters**: With this setting, you can specify the required minimum equity for followers to register for the offer.
4. **Public Agents**: If other xChief users promote your offer to potential followers, you can set the percentage of earnings given to said promoter (agent) here. A separate link must be created for each promoter (agent).
5. **Additional Agents**: This section specifies what percentage of the profit payable to the provider should be deposited into the agent's trading account. If you've specified the trading account and profit percentage in this section, any registrations through the provided offer link will result in a portion of the provider's profit being paid to the agent.
6. **Offer's Join Links**: These links allow followers to register for your private offers. To create a private link, click the "Add" button in the "Membership Links" section, assign a title and keyword, specify the link expiration date, and create it. The link can be edited, deleted, and copied by clicking the three-dot button (...) next to it.

*It's worth mentioning that if you've defined the value of "Public agents" for the desired offer, the agent field will be active when creating the link. You can enter the account number of the desired agent in this field. By copying the link and sending it to the agent, if a follower registers via this link, profit will be allocated to the public agents based on the specified percentage.*

#### **Example of Subscription Fees:**

Let's say your provider account is private and that you have set the "performance fee" at 30%. Furthermore, let's say you've specified that 2% of your performance fee is to be sent to the additional agent's xChief account and 3% to the public agent. In that case, the following will take place:

For this example, we'll presume that your offer link, which we'll call Link1, has attracted a follower who has earned \$120 from your signals. As you've set your performance fee at 30%, you will earn a profit of \$36. However, since you've specified that 2% of your performance fee should be sent to an additional agent and 3% to a public agent, then of the \$36 earnings, \$0.72 (2%) will be sent to the additional agent indicated in your settings and \$1.08 (3%) will be sent to the public agent. Hence, your total earnings will be \$36 - \$0.72 - \$1.08 = \$34.20.

Had you set ~~neither~~, you'd receive the entirety of the \$36 revenue. Furthermore, had you set only the **additional** agent's 2% fee, your earnings would be  $\$36 - \$0.72 = \$35.28$ . Conversely, had you set only the 3% fee for the public agent, your earnings would be  $\$36 - \$1.08 = \$34.92$ .

#### • Assigning an image to your account

To assign an image to your trading account:

1. Log in to your Provider account in the Copy Trading menu.
2. Click on the green key and select "Update Avatar".
3. Click the arrow in the fable field and select the desired image.
4. Hit the "Upload" key to update your image.

To change the image, repeat the above steps. To delete the image, follow the above steps until you get to the "Update Avatar" section. Next, click "Delete".

#### • Account status of my funds management accounts

This section shows the information of the provider account, accessible by tapping on the provider's name. The information includes:

1. **Account Nickname:** The title assigned when you created the provider account.
2. **Trading Account Information:** The account number and name of the Provider account holder.
3. **Floating Balance:** The liquidity of the provider's account shown in USD.
4. **Registration Time:** The date of creation of the provider account.

Archived provider accounts will not normally be visible in this section. To view and access their settings, set the "Range" parameter to "All" in the filters section.

### Filters Section

You can search providers based with the following parameters:

1. **ID:** Provider Account Unique ID
2. **Alias:** Provider Account Name
3. **Trading Account Number:** The trading account number used to create the Provider Account.
4. **Scope:** Shows active accounts when set to "Active" and includes archived accounts when set to Everyone.

### Transaction History

This section shows all transactions made in your provider account, typically related to fees or subscription fees credited to or debited from your account. If your provider account includes only a subscription fee, no other fees will be credited to your account. If you have set fees to be paid to public agents or additional agents, those fees will be shown here as having been deducted from your earnings.