

Copy Trading Checklist for Traders

A practical checklist for traders before activating copy trading on Brokeree Solutions' Social Trading or other copy trading platforms.

- ☐ **Ensure Full Account Activation**

Confirm the trading account is fully onboarded and funded before accessing copy trading features.

- ☐ **Sort by Key Metrics**

Use sort filters to rank providers by Total Profit, Max Drawdown, Recovery Factor, or other broker-defined metrics.

- ☐ **Review Provider Performance**

Apply filters, such as *Order By*, in Ratings Module or other widgets to compare provider performance across multiple timeframes and key metrics.

- ☐ **Analyze Trades and Add to Watchlist**

Review traded instruments, position sizes, best and worst trades, trade frequency, and the equity curve, then add selected providers to the watchlist for monitoring.

- ☐ **Select a Subscription Strategy**

Choose how volumes are copied: Auto-scale, Multiplier, Fixed Volume, or Lots Proportion.

- ☐ **Define Volume Limits**

Set minimum and maximum lot sizes for copied trades.

- ☐ **Apply a Correction Limit**

Define the maximum allowable lot size per trade and choose whether oversized volumes are skipped or scaled down.

- ☐ **Configure Risk Management Rules and Trade Handling**

Select a risk parameter (Total or Floating Loss or Total Profit), define the action on breach (Hold/Unsubscribe/ Cancel), and specify how open positions are handled when limits are reached.

- ☐ **Handle Small-Volume Trades**

Choose whether volumes below the minimum contract size are skipped or rounded to the minimum allowed size.

- ☐ **Subscribe and Activate**

Subscribe to your chosen provider, choose whether to copy currently open provider positions at market price or wait for new trades, and then activate."

☐ **Monitor Performance and Adjust Settings**

Track copied positions and exposure, and update subscription strategy or risk controls as trading behaviour or account balance changes.

** On Brokeree Solutions' Social Trading, newly created subscriptions are placed on hold by design. No trades are copied until both subscription strategy and risk management settings are configured and the subscription is activated. This mechanism exists to prevent uncontrolled exposure at the moment of subscription.*