

Getting Started

Version 2 - 10/19/22

Welcome to Dynamic Equities! Part 1 of this document will show you how to configure an account on Collective 2 to auto-trade Dynamic Equities into a live brokerage account. Part 2 is about setting permissions in an Interactive Brokers account to trade Dynamic Equities.

Part 1: Auto-Trading Dynamic Equities through Collective 2

As far as we know, Collective 2 is the only company that allows traders (which they call "Trade Leaders") to submit trades on stocks, futures, and options into a server, so they can be distributed to individual client accounts. C2 has been in business over 20 years and has a good reputation for accurate delivery of trades to investor accounts.

Establishing an Account at Collective 2

1. Create Account. Go to <u>www.collective2.com</u> and click Create Account



2. Check Your Email

Your account is created and a verification email is sent...

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	Login to your Account / Have questions? Collective2 The world's first Distributed Hedge Fund. Collective2 LLC New York USA +1.914.610.3979 www.collective2.com		Hooray Ed Downs!
Click Verify Email Address. Click Continue Using Site.			Continue using site

What's This?



Collective 2 is somewhat complex if you are a Trade Leader (like us). But it's not that complex for subscribers. We think you will find the following instructions to be adequate. Note that if you click "I don't like free training" on this pop-up, it will tell you how to get help later.

3. The Dynamic Equities Page

Click this link: https://collective2.com/my/67M6CBTQI

You will be asked to log in, after which you will see the Dynamic Equities page.

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Click Subscribe

Subscribing costs \$0 and enables you to track the Strategy's Performance

4. The "Are You Sure?" Page

Collective 2 detects that this is a brand new Strategy that has only been on the site for a short period of time. So they promote other Strategies that have been running longer and basically ask "Are you sure you still want to subscribe?"

The note at the right indicates that you will receive Trades in Real Time through email, as well as P&L Statements and Position Reports

Click Subscribe

Immediately after you subscribe, you will be taken to the AutoTrade payment screen.





About AutoTrade

With C2 AutoTrade, any Strategy monitored by C2 can be set to target an account at Interactive Brokers and about 15 other brokers.

Important Information about C2 AutoTrade

AutoTrade Cost - After subscribing to Dynamic Equities and will receive trades and performance information at no cost. For Collective 2 to automatically trade your broker account, they charge \$49/month or \$390 a year – a \$200 savings.

C2 also charges more for increasing allocation (up to 10x – see **Account Size** below). When you increase allocation on the AutoTrade Settings page, they will explain this.

Number of Accounts – AutoTrade on Dynamic Equities can only be connected to one account Login. Multiple accounts per user are not allowed.

Account Size – We set the recommended starting balance to \$30,000 so investors can start with a smaller account. C2 allows Investors to trade up to 10x this amount, or \$300,000. Members can use leverage to take advantage of this. For example a \$30,000 account can trade at least \$60,000 at I.B. overnight (using margin). In this case, all trades will be amplified 2x in the user's account (see **8. AutoTrade Configuration Screen**).

Dedicated Account – Because of the potential for trade collisions and resulting user frustration (which C2 does not want to deal with), any account traded by C2 must ONLY be traded by C2. <u>No other positions can be present in the account that you connect C2 up to</u>. When you turn on AutoTrade, C2 will verify that the account is Empty.

Setting Up AutoTrade

5. **The AutoTrade Control Panel.** After you SUBSCRIBE to Dynamic Equities (as described above), click **AutoTrade** in the left menu and then, AutoTrade Control Panel.

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The AutoTrade Control Panel (after AutoTrade is turned on)

Click Set Up AutoTrade to the right of the Dynamic Equities entry. You will be taken to the AutoTrade Payment Screen.

6. The AutoTrade Payment Screen

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AutoTrade Payment Screen

To AutoTrade a single Strategy in a brokerage account, C2 charges \$49/month. There is also an Annual Subscription, which is just \$390 – a \$200 savings.

Select Monthly or Annual payment plan. Then click Solo. Enter your credit card payment information on the right side.

7. Selecting the Broker

Click the **All Available Brokers** tab and select your desired broker. If your I.B. account is linked to Garwood Securities, select **GarWood**. If you use TWS for your trading, select **Interactive Brokers**.



Select a broker

Enter your brokerage account number.

Then click Next Step

8. AutoTrade Configuration Screen

et up AutoTrading for Dynamic Equities							
Choose AutoTrade Plan	Select Broker	3 Configure settings					
Review your AutoTrade	settings						
Strategy name: Dyna	mic Equities	ID #: 142175351					
Connecting to Broker	Change this						
Interactive Brokers (Stocks, Options, Futures) Account #: U4929252							
Trade Management	DEFAULT DETAILS						
Stop Loss 🛛		DEFAULT MODIFY					
AutoTrade Scaling 🛛		DEFAULT MODIFY					
Join trades in progress? Θ	Join trades in progress	Don't join trades in progress					
Currently, Dynamic B	Equities has 5 open positions. S	Show open positions.					
		Turn on AutoTrade					

There are 4 Items on this page.

- Trade Management: Enables you to intervene in the trading process in various ways.
- **Stop Loss:** You can set a Stop Loss beyond what the Strategy does.
- AutoTrade Scaling: Scale the account up to 10x.
- Join trades in progress? Select Don't Join trades in progress.

When you are ready, click Turn on AutoTrade

9. Agreements & Notifications

There are Agreements and Notifications to work through. The first one informs you that your account has to be empty to engage a Strategy in Collective 2.

Your	account must be empty	^
If you	proceed, we will close any positions that exist in your account. Your account should be dedicated to AutoTrading. Interactive	
Broker	s makes it simple to create a second broker account, once you have a first. Here are instructions.	
If your	account is empty, please continue.	-

Read and type I Agree for each.

10. Agreement to Connect and Receive Trade Signals

Once you have completed the process, you will see the Success Message.

Setup for Dynamic Equities accepted by your broker for broker review.	
Please download and complete the appropriate form: For accounts held by individuals For accounts held by organizations	
	Done

There is a link to download the <u>Agreement to Connect and Receive Trade Signals</u>. You will need to complete and sign the Agreement and send it to <u>docs@autotradenow.com</u>, with your Photo ID, and then wait for broker approval.

11. Waiting for Broker Approval

You will see this note on your AutoTrade Control Panel until approved.

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Collective 2 will notify you when you have been approved for AutoTrading.

You may have to click the **LIVE** button on the Dashboard (the page that comes up when you log in). **Being LIVE means you are AutoTrading.**

C2 Resource Email

When you subscribe to a Strategy, you receive a confirmation email. This email has links to the Strategy page, the AutoTrade Control Panel, and other links.

Save the email you received to refer to if you need it.



Getting Help

For additional assistance, contact:

Collective 2 Support (914-610-3979)

Nirvana Support (512-345-2545)

Part 2: Setting Up Interactive Broker Permissions to Trade Dynamic Equities

Collective 2 supports about 15 brokers. When you turn on AutoTrade in C2, you select the broker and enter your account number as indicated above. In this section, we will talk about establishing permissions in your account at **Interactive Brokers** to trade Dynamic Equities.

- 1. Log into your IB account (<u>www.interactivebrokers.com</u>) and go to the dashboard.
 - Click the Portfolio tab.
 - Click your name (upper right corner)
 - Then click Settings on the right.

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Dashboard – Get to Settings.

2. On Settings, click Trading Permissions



Trading Permissions

On the Trading Permissions Screen, you will need to click **Request** on the 3 types of securities that are traded by Dynamic Equities.



Trading Permissions

If you see this message, it means you have made account changes (or updated settings or personal info) which must be approved before you can edit permissions (a day or two).

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		The	following	changes to	A o your account a	re pending ap	oproval:		
	Fina	ncial Information C	Change Request						
Pending changes must be processed before a change to Trading Permissions can be requested. Click Cancel to cancel all pending changes.									
								Cancel	
								•	

I.B. notice that prior account changes are pending approval.

3. Set Region

If you do not have any pending account changes at I.B., you will be taken to the Trading Permissions page for the item you selected (Stocks, Futures, or Complex/Leveraged).

Generally, you want to select United States if countries are shown on the page.

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Select the locations you wish to	trade Stocks	Requirements to Trade
		Stocks
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Australia	Hong Kong	Financial Profile, which in turn, is used when determining whether to approve
Hong Kong/China Stock Connect	Japan	accounts for Stocks trading permissions.
Singapore		Please note that IBKR does not disclose
All Europe		the eligibility requirements for any products.
Austria	Baltics (Estonia, Latvia, Lithuania)	
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Editing Permissions for Stocks

Having completed these steps, you need to wait until permissions are in place, which can take a day or so. After that, Collective 2 should be able to place trades into your account.

In case you need them,	here are Interactive Brok	ers' Support Lines:
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United States	07:00 - 19:00 (Mon - Fri) (America/Chicago) 12:00 - 18:00 (Sun) (America/Chicago)