

Dynamic Equities

Adapt. Trade. Hedge. Repeat.



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

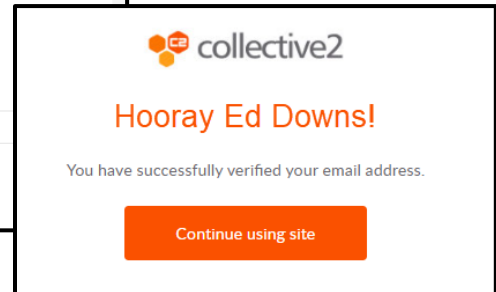
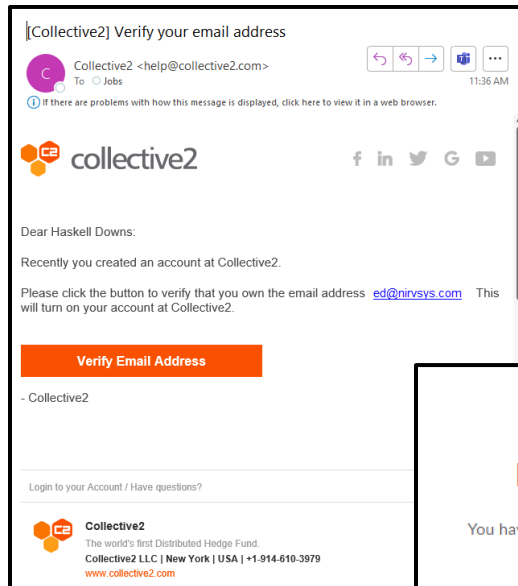
1. **Create Account.** Go to www.collective2.com and click Create Account

The image illustrates the process of creating a Collective 2 account. It features three main components:

- Website Screenshot:** The top part shows the Collective 2 homepage with the headline "Don't pick the best stocks. Pick the best investors." and a "Create Account" button highlighted by a red arrow.
- Account Creation Form:** The middle part shows the "Create a free Collective2 Account" form. It offers social sign-up options (Facebook, LinkedIn, Google, Twitter) and a traditional email sign-up form with fields for First Name, Last Name, Email, and Password. A blue arrow points from this form to the welcome email.
- Welcome Email:** The bottom right part shows a sample welcome email with the subject "Welcome to Collective2!". The body text says: "We sent an e-mail to jobs@nirvsys.com. Please click the link inside the message to verify your account." It also includes links for "Can't wait to get started? Start using Collective2 right now." and "Never got our e-mail? Resend it."

2. Check Your Email

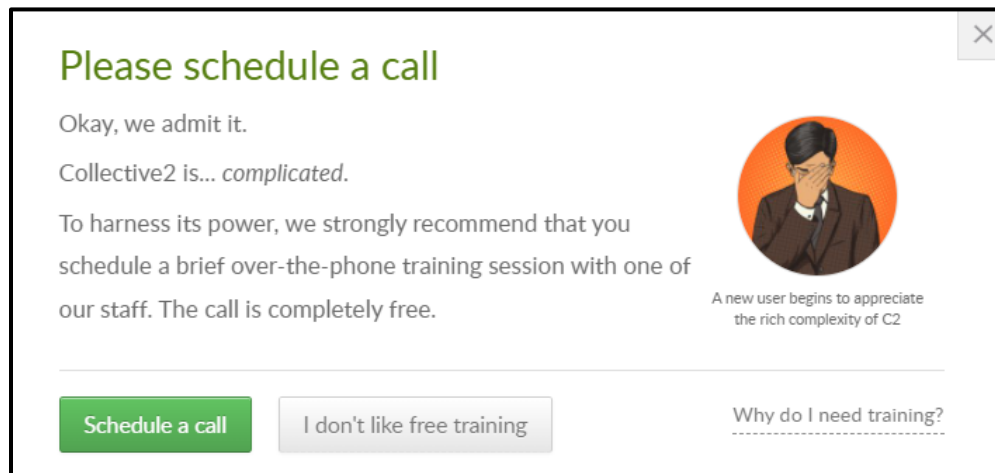
Your account is created and a verification email is sent...



Click .

Click .

What's This?



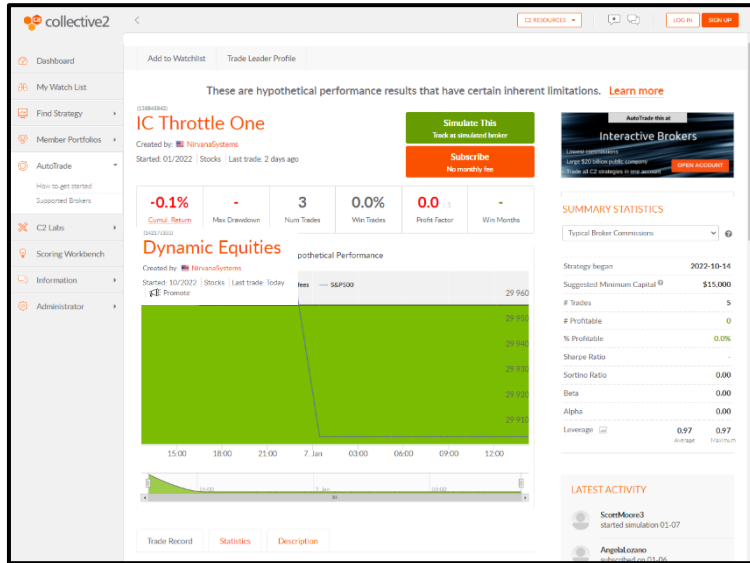
Collective 2 is somewhat complex if you are a Trade Leader (like us). But it's not that complex for subscribers. We think you will find the following instructions to be adequate. Note that if you click "I don't like free training" on this pop-up, it will tell you how to get help later.

Subscribing to Dynamic Equities

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.



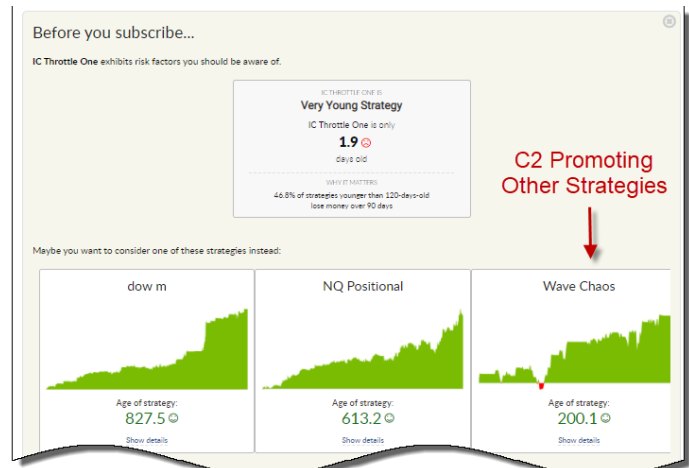
Click Subscribe

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

4. The "Are You Sure?" Page

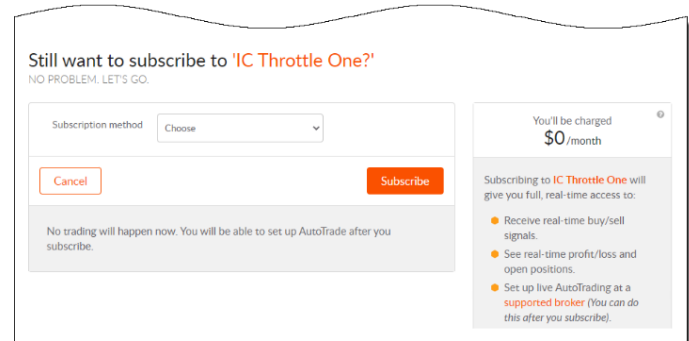
Collective 2 detects that this is a brand new Strategy that has only been on the site for a short period of time. So they promote other Strategies that have been running longer and basically ask "Are you sure you still want to subscribe?"

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. No other positions can be present in the account that you connect C2 up to. 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.

The screenshot shows the C2 AutoTrade Control Panel. The top navigation bar includes the C2 logo, a search bar, and links for 'WHAT'S NEW' and 'C2 RESOURCES'. The user profile for 'Haskell' is visible, along with a 'VIEWING SITE AS' dropdown set to 'INVESTOR'. The 'PORTFOLIO HEALTH' is shown as 1.0. The 'AutoTrade' menu item is highlighted in the left sidebar. The main content area is titled 'Currently AutoTrading' and features a table with the following data:

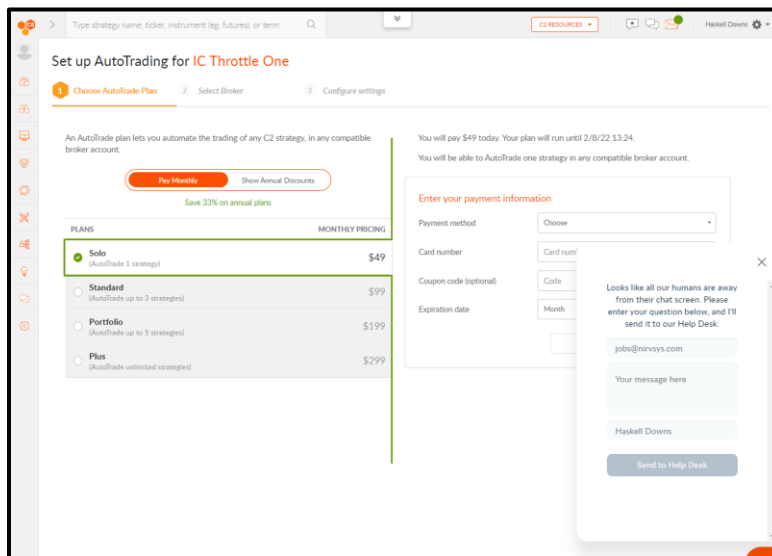
STATUS	STRATEGY NAME	YOUR BROKER	STRATEGY MODEL ACCOUNT	YOUR SCALING %	YOUR STOP LOSS	
TRADING	Dynamic Equities	Interactive Brokers (Stocks, Options, Futures) Account number: U4929252	\$29,500	100%	none	SETTINGS

Below this, the 'Available for Live AutoTrading' section states: 'These are strategies that you already are subscribed to, but which you are not currently AutoTrading.' It includes a table with columns: STRATEGY, TRADES, RETURN, LAST 30 DAYS, LAST 90 DAYS, and LAST 180 DAYS.

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



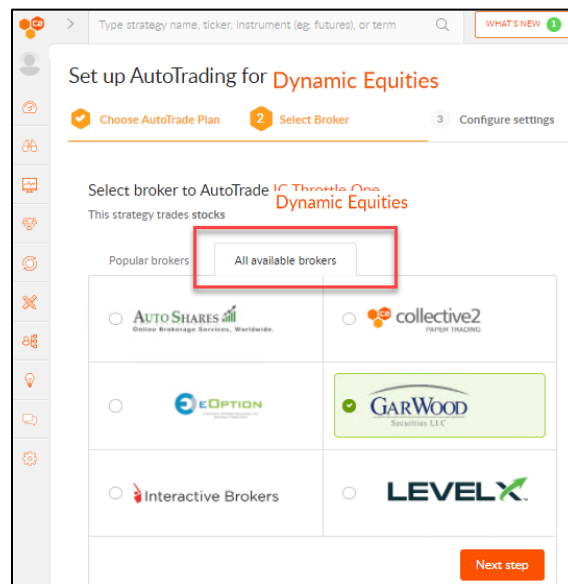
AutoTrade Payment Screen

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

Set up AutoTrading for **Dynamic Equities**

✓ Choose AutoTrade Plan ✓ Select Broker 3 Configure settings

Review your AutoTrade settings

Strategy name: **Dynamic 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? ⓘ [Join trades in progress](#) [Don't join trades in progress](#)

Currently, Dynamic Equities has 5 open positions. [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.

Agreements & Notifications

To complete AutoTrade Setup, we ask you to read the following and indicate your agreement below.

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 Brokers makes it simple to create a second broker account, once you have a first. [Here are instructions.](#)

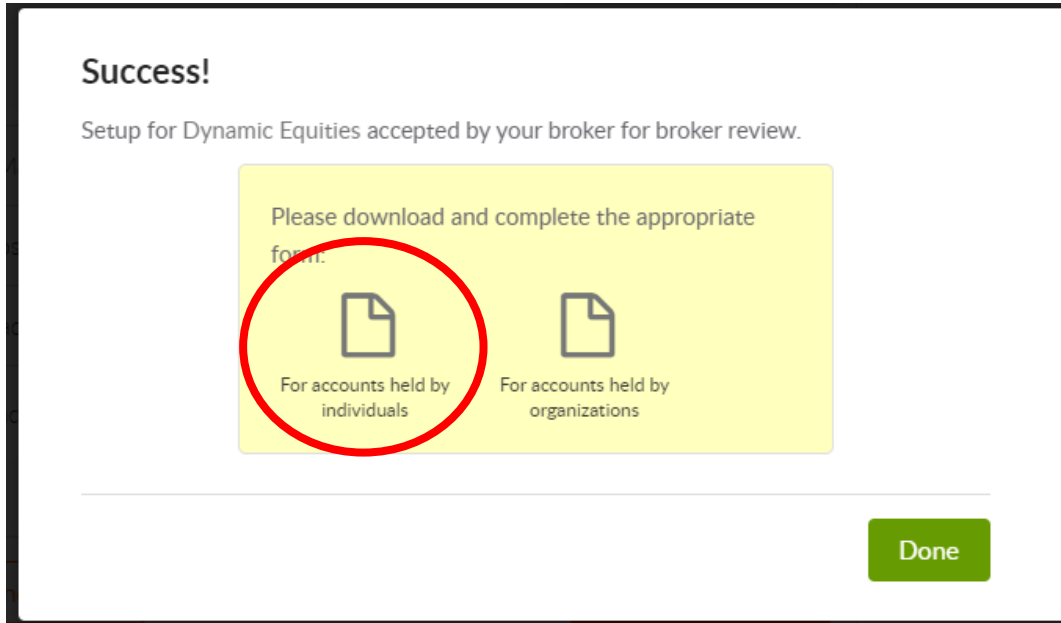
If your account is empty, please continue.

To acknowledge that you have read this, and agree to it, please type: I AGREE in the box below.

Read and type **I Agree** for each.

10. Agreement to Connect and Receive Trade Signals

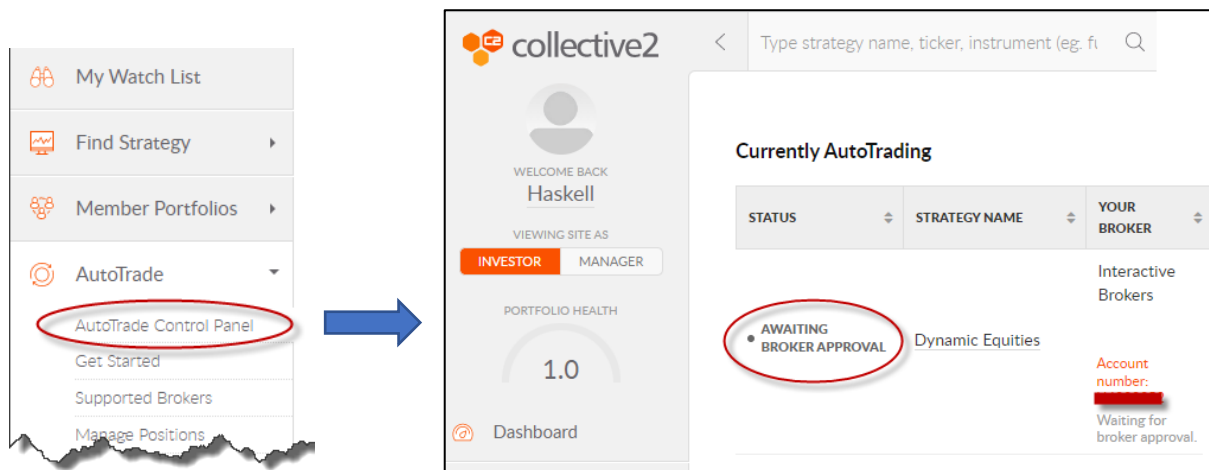
Once you have completed the process, you will see the Success Message.



There is a link to download the [Agreement to Connect and Receive Trade Signals](#). You will need to complete and sign the Agreement and send it to docs@autotradenow.com, 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.



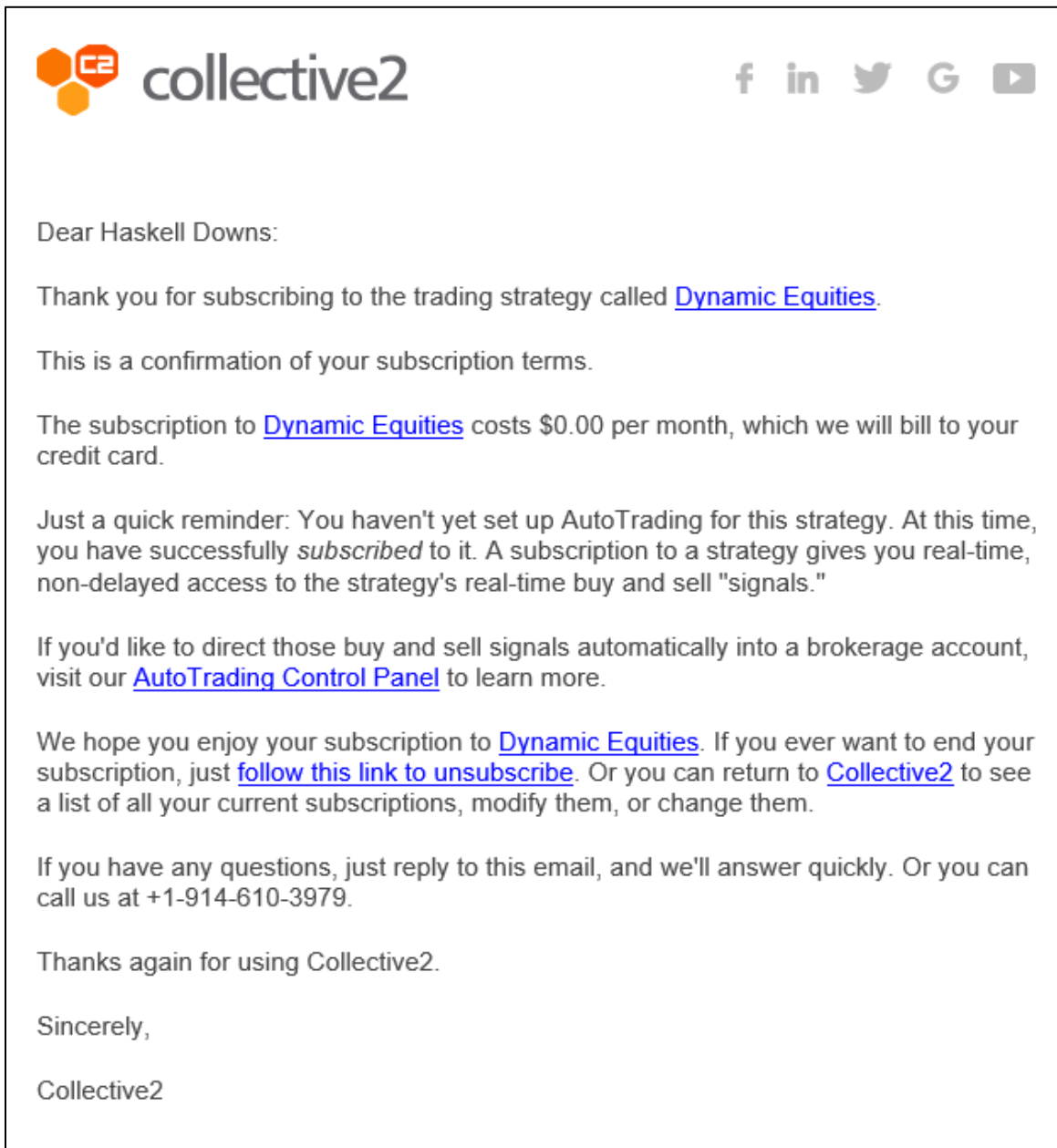
Collective 2 will notify you when you have been approved for AutoTrading.

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:

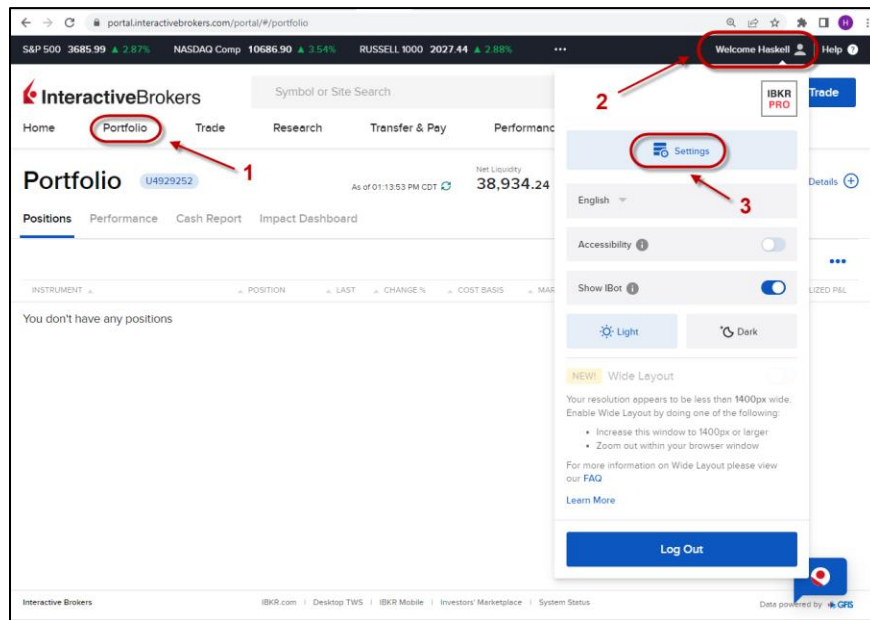
Collective 2 Support (914-610-3979)

Nirvana Support (512-345-2545)

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

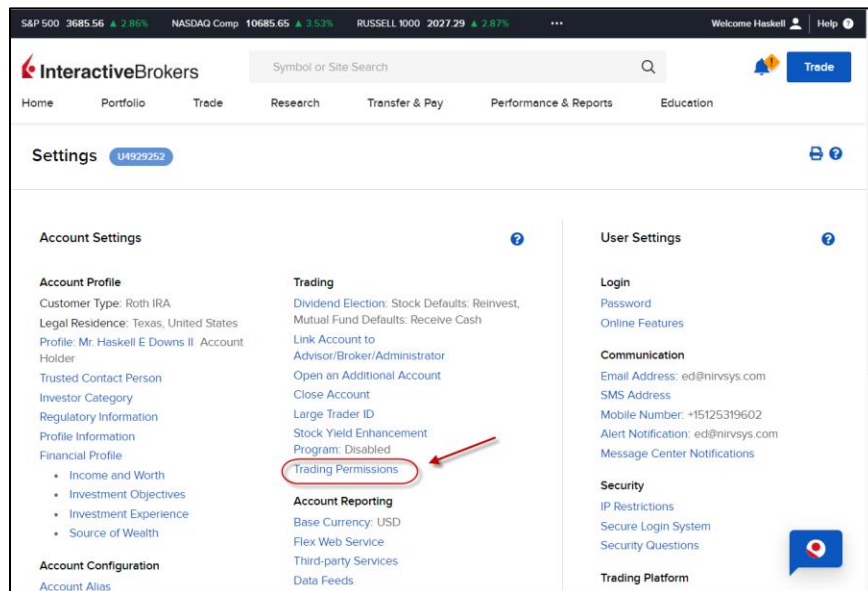
Collective 2 supports about 15 brokers. When you turn on AutoTrade in C2, you select the broker and enter your account number as indicated above. In this section, we will talk about establishing permissions in your account at **Interactive Brokers** to trade Dynamic Equities.

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



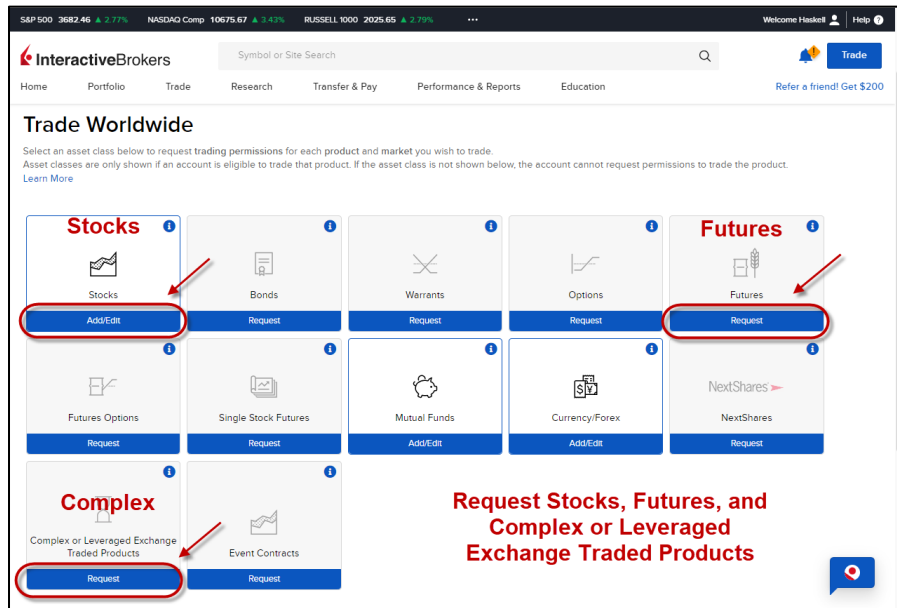
Dashboard – Get to Settings.

2. On Settings, click Trading Permissions



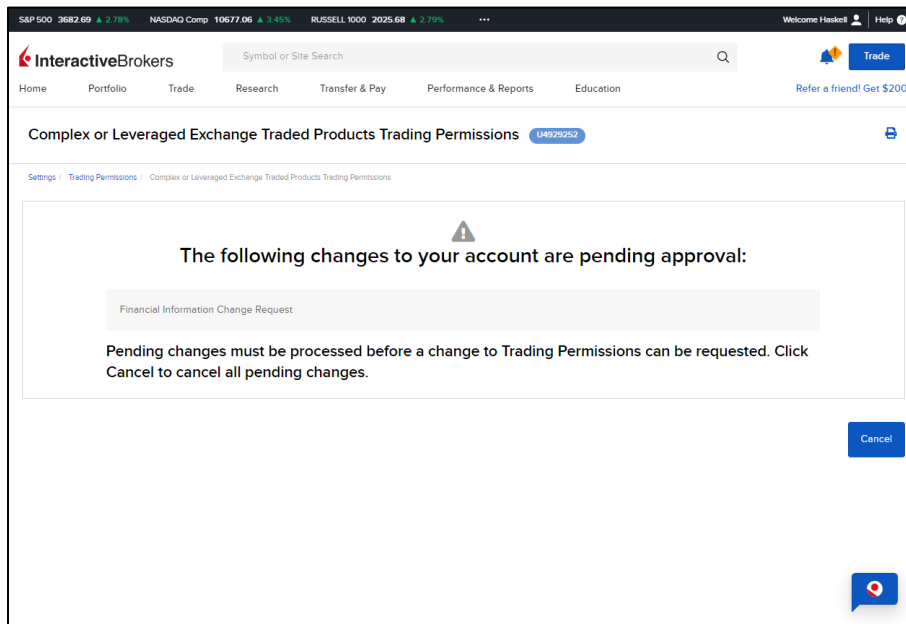
Trading Permissions

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).

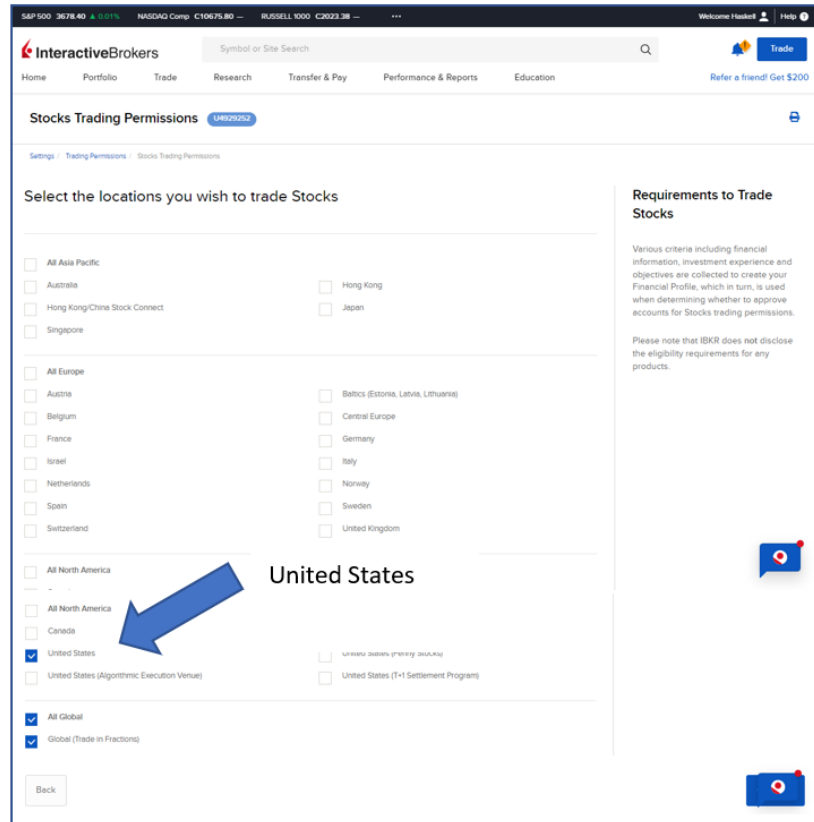


I.B. notice that prior account changes are pending approval.

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.



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 Brokers' Support Lines:

United States	1 (877) 442-2757 Toll-Free ⁵ 1 (312) 542-6901 Direct dial	07:00 - 19:00 (Mon - Fri) (America/Chicago) 12:00 - 18:00 (Sun) (America/Chicago)
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