

RT SIGNALS PLAYBOOK

Member Platform Guide

retirementtrades.com

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Introduction

RT Signals is a rules-based market intelligence platform built around one core insight: the market's emotional state should determine how aggressively you deploy capital, not your opinion about where the market is going.

The system does not predict direction. It measures the current sentiment environment and translates that into concrete position-sizing guidance. In fearful markets, you deploy more. In greedy markets, you hold cash. This is uncomfortable because it runs counter to how most investors instinctively behave. It is also where the edge lives.

The Three Core Tools

Three tools work together to operationalize the strategy:

- **The RT Pulse** measures market sentiment on a 0-100 scale using five institutional data sources. It updates daily and drives every position-sizing decision in the system.
- **The Screener** runs a nightly automated scan of approximately 2,400 tickers. It finds individual stocks that meet statistically-defined entry patterns across three setup types.
- **The Workbook** is a structured trade-planning tool that grades each opportunity and calculates exact position sizes before you enter.

Supporting tools include Expected Moves (SPY/QQQ volatility ranges for options strike selection) and Sector Rotation (relative strength ranking across eleven SPDR sector ETFs).

The Contrarian Philosophy

The system is deliberately built to do the opposite of what feels comfortable. When markets are in panic, sentiment tools tell you to buy. When markets are euphoric, they tell you to hold cash. This is uncomfortable in practice, even when you understand the logic intellectually.

Three rules override everything else in this system:

1. **Pulse first, always.** The market environment determines sizing. A perfect technical setup in an Extreme zone gets minimum position size. No exceptions.
2. **Never fight the zone.** When the Pulse says MINIMUM, minimum is the right answer, even when you're confident in the trade.
3. **Cash is a position.** The discipline to hold cash in Extended and Extreme zones is what funds your best entries when Fear or Crisis arrives.

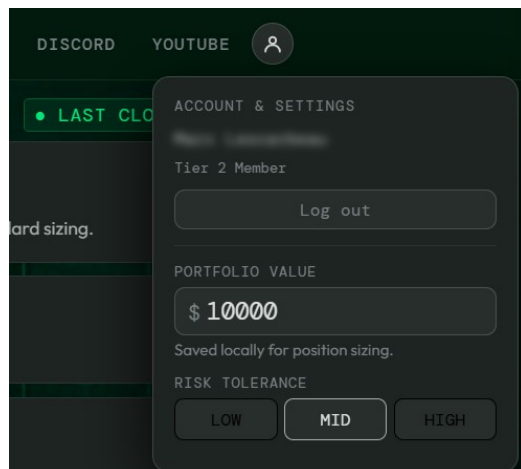
How to Use This Playbook

This document walks through each tool in detail: what it measures, how to read it, and what to do with the information. Each major section ends with a step-by-step workflow you can follow immediately.

The final section, the Master Weekly Workflow, ties everything together into a daily and weekly routine that keeps the full system working as designed.

Your Two Master Settings

Before you read another section, configure these two inputs. They cascade through every sizing output across the entire platform. Set them once; the platform recalculates everything automatically.



Account & Settings popup — click the person icon in the top-right header to open.

Portfolio Value

Enter your total tradeable portfolio value in the Portfolio Value field. This is the dollar amount you are actively sizing positions against, not necessarily your total net worth.

Once set, this single number converts every percentage-based sizing output into real dollar amounts. The Pulse sizing cards show dollar ranges per position. The Screener's options scenarios show estimated capital required per contract. The Workbook's worksheet calculates exact dollar risk and position size.

Portfolio Value is saved locally in your browser and persists across sessions. It is not transmitted to any server.

Keep your Portfolio Value current. Update it whenever your account balance changes significantly — after a large deposit or withdrawal, after a major gain or loss, or at minimum once a month. An outdated Portfolio Value means every dollar amount shown across all pages will be wrong.

Risk Tolerance: LOW, MID, HIGH

Risk Tolerance applies a multiplier to all base sizing ranges. Choose the level that matches your psychological and financial profile:

Setting	Multiplier	Best For
LOW	70%	Retirees, income-focused traders, anyone who prioritizes sleep over returns. Significantly smaller positions with wider margin for error.
MID	100%	The baseline. All sizing examples in this playbook reference MID unless stated otherwise. Balanced between opportunity and risk.
HIGH	130%	Active traders with higher psychological tolerance for drawdowns. Only appropriate if you have tested your response to larger swings.

HIGH Risk Tolerance Warning

HIGH multiplies every position size by 1.3x. In a DEPLOY zone with HIGH risk tolerance, you may be sizing positions at 10-13% of portfolio per trade. That is appropriate only if you have genuinely tested your reaction to that level of drawdown in practice, not just in theory.

The Cascade Effect

Changing either setting updates every output across all pages simultaneously:

- Pulse page: sizing card dollar amounts update instantly
- Screener: options capital estimates in the modal adjust
- Workbook: worksheet dollar risk and position size recalculate

You never need to re-enter your portfolio or risk preference on individual pages. The settings are shared across the entire platform from a single source.

Part 1: The RT Pulse

The RT Pulse is a single number from 0 to 100 that measures the current emotional state of the market. It is calculated from five independent institutional data sources, updated once per trading day at 5:30 PM ET, and it is the primary input for every position-sizing decision in the system.

Higher scores indicate greed and complacency. Lower scores indicate fear and capitulation. The historical median is 64, which falls inside the Neutral zone. This means the market spends most of its time in a moderately constructive state. Fear and Crisis conditions, the best buying opportunities, represent only about 22% of all trading days.

The Five Inputs

The Pulse combines five independent sources, each measuring a different dimension of market sentiment:

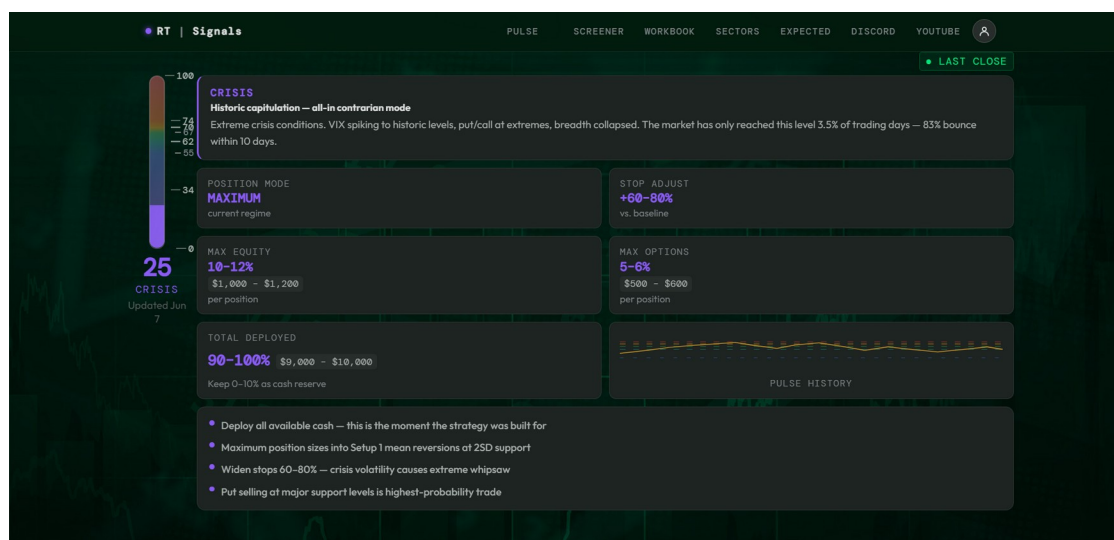
Input	What It Measures
VIX	CBOE Volatility Index — the market's implied fear gauge. High VIX reflects fear and panic, which pushes the Pulse lower.
Put/Call Ratio	CBOE equity put/call ratio. When traders pile into protective puts, fear is elevated and the Pulse drops. Uses equity-only data to filter out institutional index hedging.
MA Distance	S&P 500 price relative to a medium-term moving average. Extreme extension above signals overheating. Extreme distance below signals capitulation.
Breadth Proxy	NYSE Composite short-term rate of change. Measures whether the broad market is expanding broadly or collapsing across most stocks — not just the large caps.
Safe-Haven Flow	Long-term Treasury ETF vs. S&P 500 return spread. When bonds outperform stocks, investors are moving to safety — a classic fear signal that pushes the Pulse lower.

Why These Five?

Each of these inputs measures a different aspect of market fear, greed, and participation. The exact weighting and combination formula is proprietary. What you need to know is that together they produce a sentiment reading that is more complete and harder to manipulate than any single source — and it has been calibrated against nearly 5,000 trading days of history.

The 7 Zones

The Pulse score maps to one of seven zones, each calibrated from 4,919 trading days of history from November 2006 through mid-2026. The zone boundaries are not arbitrary; they represent meaningful percentile breakpoints in the historical distribution.

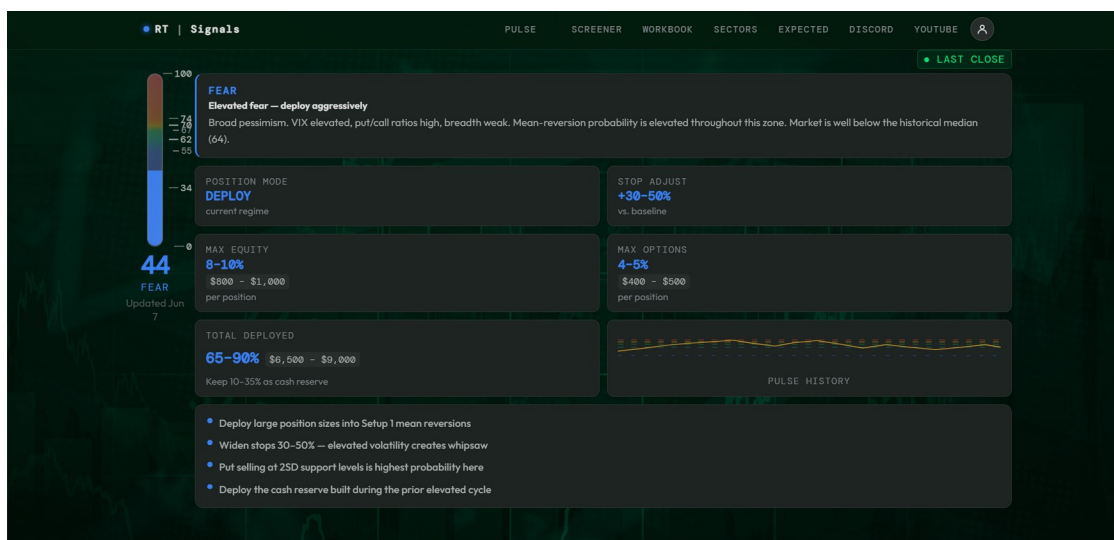


RT Pulse in Crisis zone (score 25). Position Mode: MAXIMUM. The system deploys full capital at this level.

CRISIS Score 0-33 | ~4% of trading days

Extreme capitulation. VIX has spiked to historic levels, put/call ratios are through the roof, and breadth has collapsed. The market has only reached this level about 4% of trading days. When it does, corrections are historically sharp and fast — and reversals are equally fast.

Posture: Deploy all available cash. Maximum size into Setup 1 mean-reversion entries. Widen stops significantly to survive volatility. This is the moment the entire system was built for.

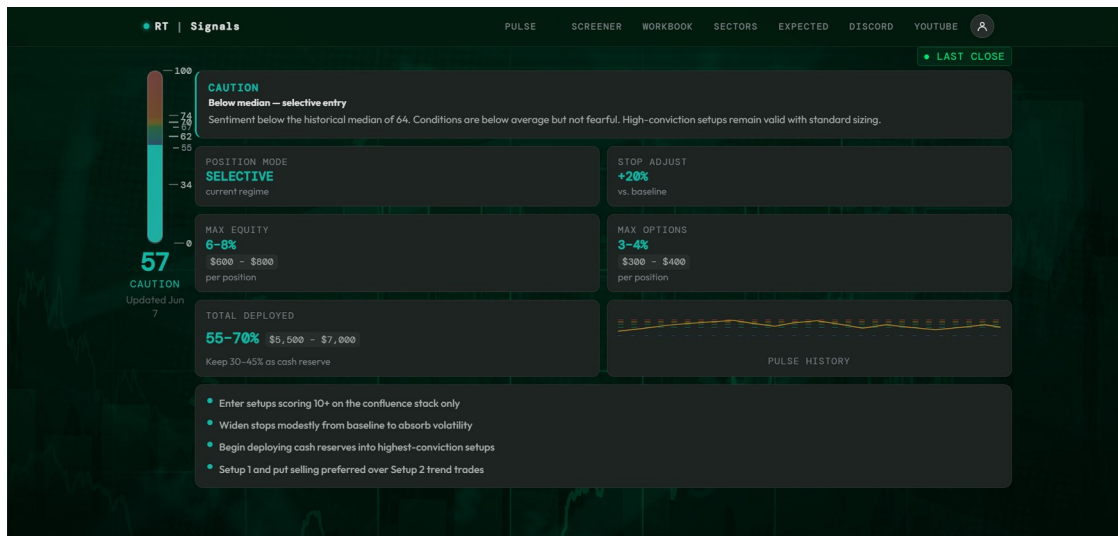


RT Pulse in Fear zone (score 44). DEPLOY mode with widened stops. The dollar ranges shown use your Portfolio Value setting.

FEAR Score 34-54 | ~18% of trading days

Elevated fear with broad market weakness. VIX is elevated, retail traders are buying puts, and broad market breadth is negative. Mean-reversion probability is historically high throughout this zone.

Posture: Deploy large size into Setup 1 mean-reversion entries. Widen stops to account for high-volatility whipsaws. Put selling at the 2SD support band is the highest-probability play in the system at this zone.

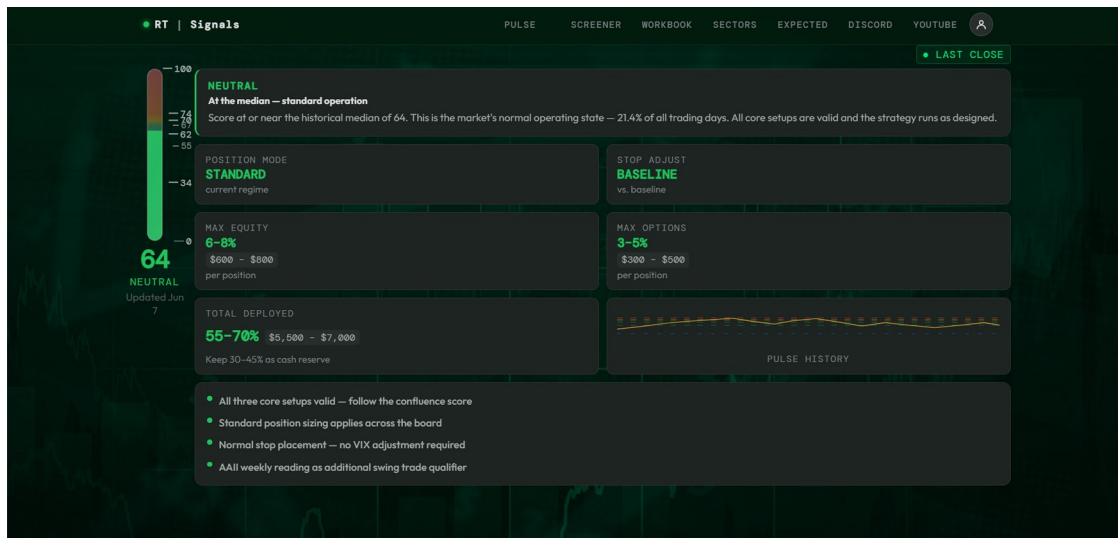


RT Pulse in Caution zone (score 58). SELECTIVE mode. Only the strongest setups qualify at this level.

CAUTION Score 55-61 | ~16% of trading days

Below the historical median. Sentiment is cautious but not panicked. Some mean-reversion opportunity exists, but conditions are not as favorable as Fear or Crisis. The market is neutral-to-weak.

Posture: High-conviction setups (score 10+) only. Put selling at the 2SD band is your best play. Avoid new trend trades — the macro does not support them yet.

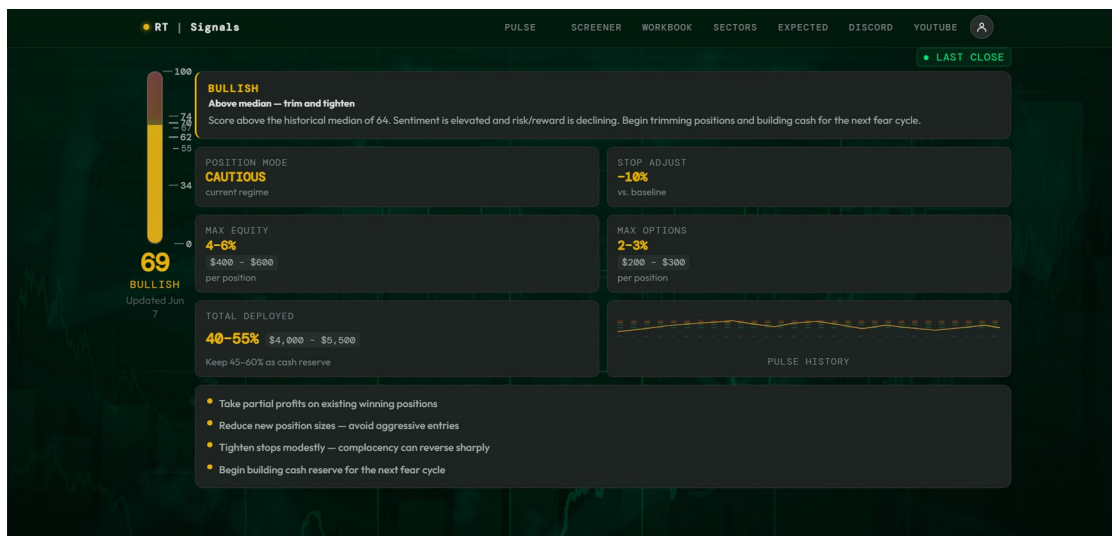


RT Pulse in Neutral zone (score 64). STANDARD mode. All three setup types are valid at this level.

NEUTRAL Score 62-66 | ~21% of trading days

The market's historical baseline. All three setup types are valid. Standard position sizing applies. No stop adjustment needed. This is the most common zone, representing about 21% of all trading days.

Posture: All setups valid. Use the confluence score to scale position size between the minimum and maximum for the zone. No directional bias required.

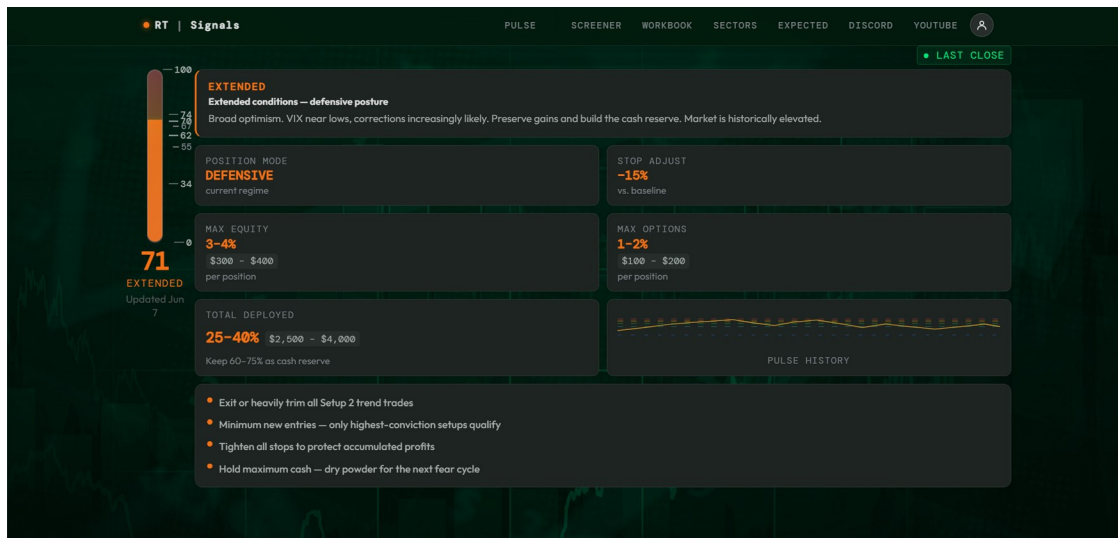


RT Pulse in Bullish zone (score 68). PROTECT mode. Begin trimming positions and building your cash reserve.

BULLISH Score 67-69 | ~18% of trading days

Above the median. Risk/reward is declining. Markets have priced in good news and upside surprises become less likely. This is when complacency starts to build.

Posture: Take partial profits on existing trend trades. Reduce new position sizes. Tighten stops modestly. Begin building your cash reserve for the next fear cycle.

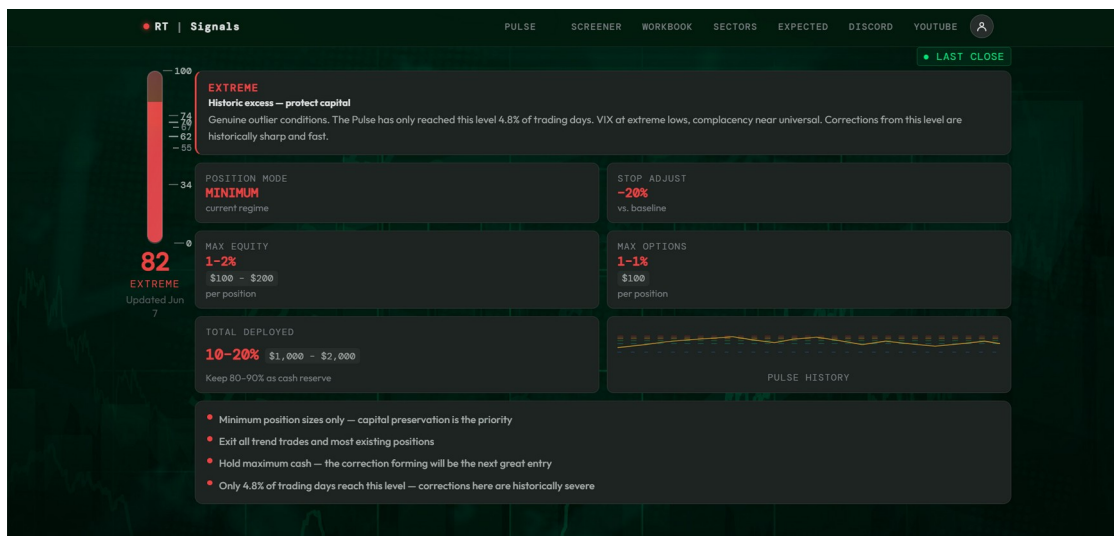


RT Pulse in Extended zone (score 71). REDUCE mode. The system holds cash and avoids new trend exposure.

EXTENDED Score 70-73 | ~19% of trading days

Broad optimism with stretched valuations. Volatility is suppressed, put/call ratios show complacency, and prices are extended above medium-term averages. The market is historically overextended at this level.

Posture: Exit or trim Setup 2 trend trades. Only the highest-conviction new entries. Hold maximum cash. That cash is your ammunition for the next fear cycle.



RT Pulse in Extreme zone (score 82). MINIMUM mode. Only 4.8% of trading days reach this level.

EXTREME Score 74-100 | ~5% of trading days

Historic excess. The Pulse has only reached this level about 5% of all trading days. Corrections from Extreme readings are historically significant. Capital preservation is the only priority here.

Posture: Minimum position sizes only. Exit all trend trades. Hold maximum cash. The correction that follows Extreme readings is where your next great entries come from.

Position Sizing by Zone

The table below shows how position sizing changes by zone. All values assume MID risk tolerance. Multiply by 0.70 for LOW, 1.30 for HIGH. Dollar amounts populate automatically once your Portfolio Value is entered.

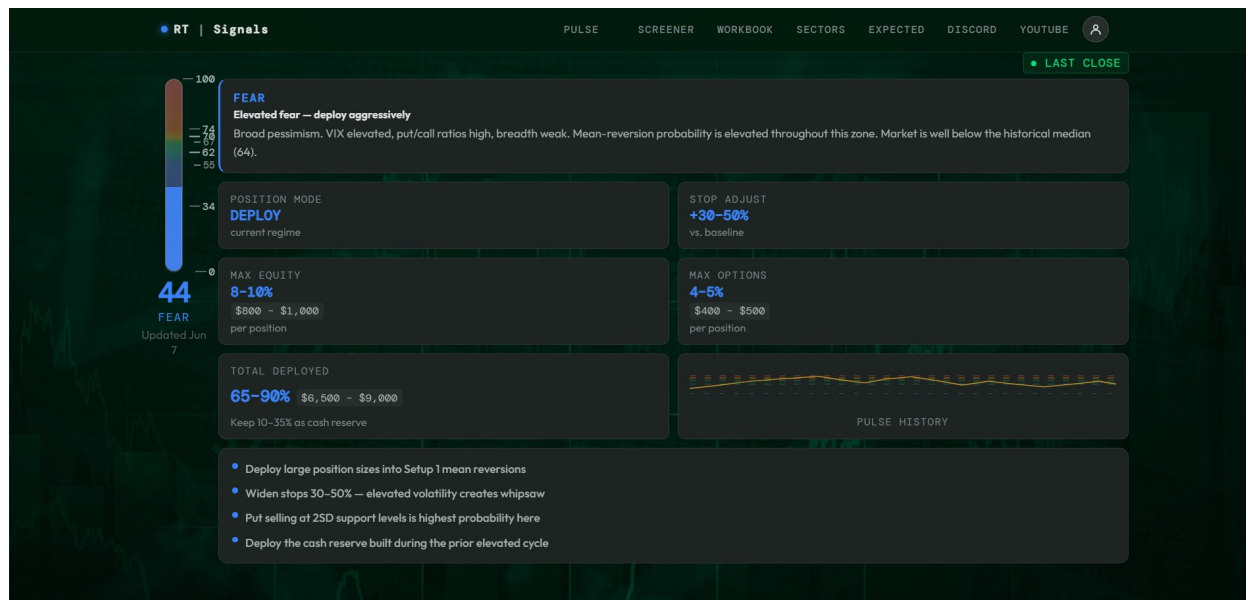
All stop adjustments are calculated relative to Neutral zone (the baseline). A "+30-50% wider" stop in Fear does not mean wider than Crisis — it means wider than what you would use in a normal Neutral environment. Neutral is always the reference point.

Max Equity = the maximum you can put into a single stock or ETF position. **Max Options** = the maximum capital for a single options position. These are per-position limits — not per sector or per day. Each individual trade must stay within these limits regardless of how many trades you have open.

Zone	Mode	Stop Adjust vs. Neutral	Max Equity (per position)	Max Options (per position)	Total Deployed
CRISIS	MAXIMUM	+50-80% wider	10-12%	5-6%	90-100%
FEAR	DEPLOY	+30-50% wider	8-10%	4-5%	65-90%
CAUTION	SELECTIVE	+10-20% wider	5-6%	2-3%	50-65%
NEUTRAL	STANDARD	Baseline	6-8%	3-4%	50-60%
BULLISH	PROTECT	-5-10% tighter	5-6%	2-3%	40-50%
EXTENDED	REDUCE	-10-15% tighter	3-4%	1-2%	25-40%
EXTREME	MINIMUM	-15-20% tighter	1-2%	0.5-1%	10-25%

Reading the Pulse Page

The Pulse page loads your current score at the top with a visual barometer on the left, then breaks down the actionable guidance below it. The zone name, mode, and all four sizing cards are visible on a single screen.



Full Pulse page in Fear zone (score 44). The barometer shows zone position. Below it: sizing cards with dollar amounts based on your Portfolio Value.

Position Mode: The current posture for the day: MAXIMUM, DEPLOY, SELECTIVE, STANDARD, PROTECT, REDUCE, or MINIMUM. This is your behavioral anchor — it tells you at a glance how aggressively to act.

Stop Adjust: The percentage to widen or tighten your stops versus your baseline chart-based level. In high-VIX environments (Fear/Crisis), standard chart stops get triggered by noise. The adjustment compensates.

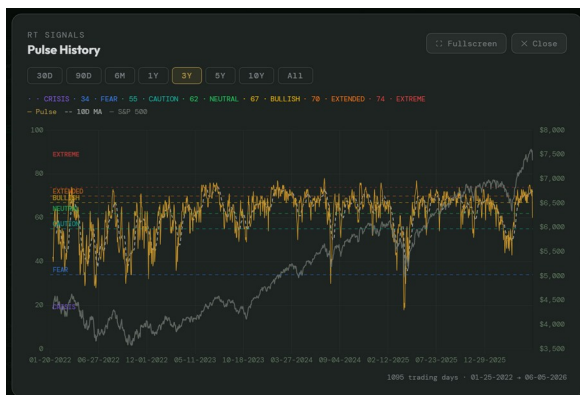
Max Equity: Maximum single position size for a stock or ETF trade. The range spans minimum to maximum viable sizing for the zone. Scale within the range based on your checklist score.

Max Options: Maximum capital to allocate to a single options position. Options are inherently leveraged; this cap keeps any single trade from becoming oversized relative to portfolio.

Total Deployed: The target range for how much of your portfolio should be in active positions. The remainder is intentional cash. In DEPLOY/MAXIMUM zones this is high (65-100%). In PROTECT/REDUCE/MINIMUM zones this is low (10-50%).

Pulse History: The mini chart card in the bottom-right corner is clickable. Click it to open the full Pulse history chart in a modal window.

Reading the Pulse History Chart



3-year Pulse history with zone boundaries



Zoomed: April 2025 crash and recovery

The history chart plots the daily Pulse score (gold line), its 10-day moving average (dashed), and zone boundary lines are labeled on the left. The S&P 500 price (grey, right axis) is overlaid for context.

The April 2025 zoom is a textbook illustration of how the system works: the Pulse dropped to Crisis (score ~20) as the S&P fell sharply. Within weeks, both the Pulse and the market recovered. Traders who deployed aggressively at Crisis readings captured the full recovery. Traders who waited for confirmation missed most of it.

Use the 3Y or All view to understand where the current reading sits in historical context. Use the drag-to-zoom feature to isolate specific periods.

Workflow: Your Daily Pulse Check

This takes under two minutes and sets the context for every other decision you make that day.

Step 1 Check the zone (5:30 PM ET or first thing next morning)

- Open the Pulse page. Note the zone name and score.
- If the zone changed since yesterday, read the zone description and action bullets.
- **Key question:** Has my posture (DEPLOY / STANDARD / CAUTIOUS / MINIMUM) changed?

Step 2 Confirm your sizing parameters

- Read the four sizing cards. Are your current positions within the Max Equity and Max Options limits?
- If positions are over-limit for the current zone, plan to trim, not immediately, but on the next good exit point.
- **Total Deployed check:** Are you above or below the target deployment range? If you're at 70% deployed and the Pulse says keep 60-75%, you're within range. If you're at 90% in a CAUTIOUS zone, that's a red flag.

Step 3 Set your intention for today

- **DEPLOY zone:** Actively look for Setup 1 opportunities in tonight's screener. Be ready to size up.
- **STANDARD zone:** All three setups are valid. Follow the confluence score.
- **CAUTION zone:** No new trend trades. Trim winners. Build cash. Check existing positions' stop distances.
- **MINIMUM zone:** Review positions for exits. Hold cash. Do not look for new entries, even if they look perfect.

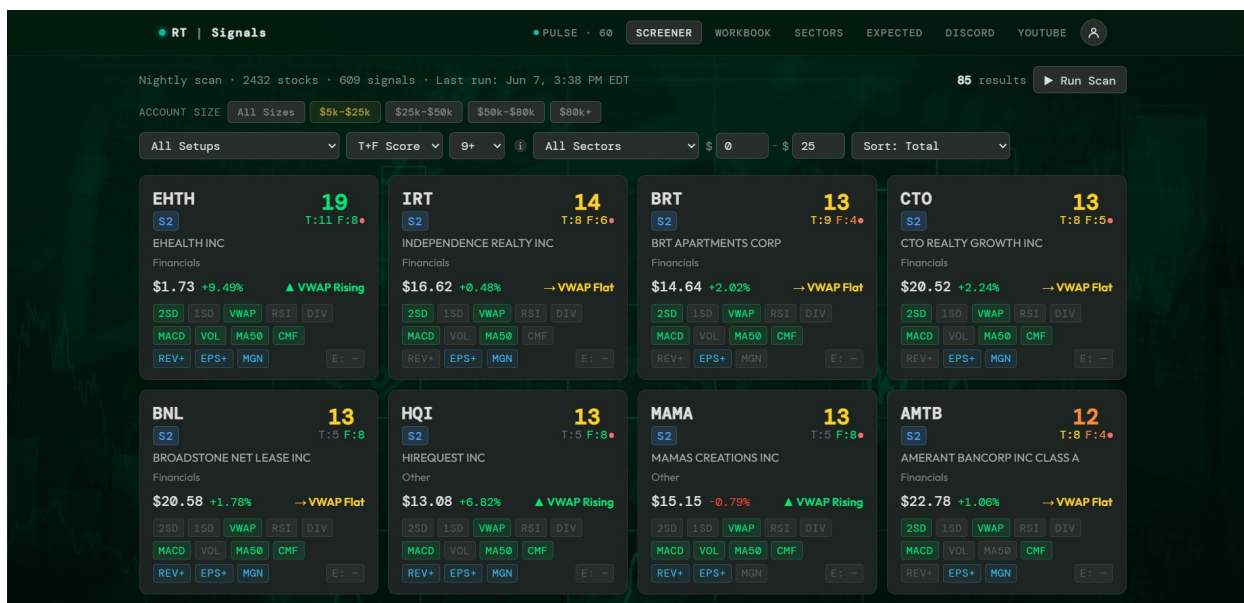
Part 2: The Screener

The Screener runs a nightly automated scan of approximately 2,400 tickers after market close. Each ticker is evaluated across ten weighted signals and assigned to one of three setup types if it qualifies. Results are served instantly when you open the page, no waiting for a fresh scan.

The Screener is the mechanism that converts a Pulse reading into a specific list of stocks to investigate. The Pulse tells you how aggressive to be. The Screener tells you where to look.

The Three Setups

Every stock in the screener results belongs to one of three setup categories. Each setup has specific conditions that must be met, a best-fit Pulse zone, and corresponding investment strategies.



Screener overview showing a mix of S1, S2, and S3 results across sectors. Filter bar visible at top.

Setup 1: Mean Reversion (S1)

Core idea: The stock has been sold to a statistical extreme and is likely to snap back toward its mean. This is the backbone of the system.

Entry conditions: Price must be beyond the 2-standard-deviation lower VWAP band, OR at the 2SD band with RSI at or below 30. Both conditions must be present.

Best Pulse zone: Fear and Crisis (score 54 and below). Mean-reversion edge is highest when macro sentiment is also at fear extremes.

Primary strategies: Bull Put Spread (primary), Cash-Secured Put, Long Call.



Setup 1 card: ENTA, score 10. Signals 2SD and RSI are confirmed (green). CMF accumulation present. 63 days to earnings.

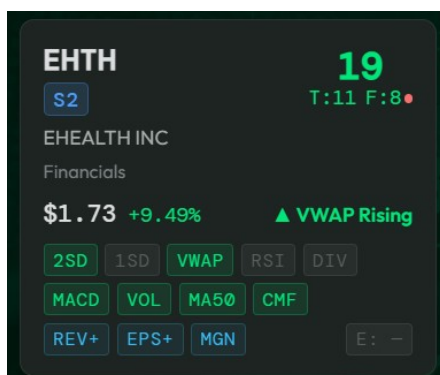
Setup 2: Trend Swing (S2)

Core idea: The stock is in an established uptrend. Enter on a shallow pullback with momentum confirmation. Only valid when the macro environment supports trend trades.

Entry conditions: Price above the 21-bar VWAP, plus MACD bullish cross or bullish divergence.

Best Pulse zone: Neutral through Bullish (score 62-69). Do not enter Setup 2 in Fear or Crisis. Trend trades in fear environments are fighting the macro.

Primary strategies: Bull Call Spread, Short-term Call (30 delta), LEAP Call (60-80 delta).



Setup 2 card: EHTH, score 19. VWAP, MACD, Volume, MA50, CMF all confirmed. Strong fundamental score (F:8).

Setup 3: Put Selling / Income (S3)

Core idea: The stock is at a moderate support level and has elevated implied volatility. Sell premium with a cushion built in. Focus on income, not direction.

Entry conditions: Price at or near the 1-standard-deviation lower VWAP band, plus elevated IV rank.

Best Pulse zone: Caution through Neutral (score 55-66). Low directional bias, time decay works in your favor.

Primary strategies: Bull Put Spread (wide), Cash-Secured Put, Iron Condor (advanced).



Setup 3 card: MGPI, score 9. 2SD confirmed. MACD firing. CMF showing accumulation.

The 10 Confluence Signals

Every ticker is evaluated across ten signals grouped into three categories. These signals appear as color-coded chips on each card (green = firing, grey = not firing, orange = warning).

Price Signals

Signal	What It Means
2SD (Beyond)	Price is more than 2 standard deviations below the 21-bar VWAP mean. Statistically rare — occurs in roughly 2.5% of price action. Required for Setup 1.
2SD (At Band)	Price is testing the 2SD lower band. Triggers Setup 1 (when combined with RSI 30 or below) and also qualifies for Setup 3.
1SD (At Band)	Price at the 1SD lower band. Moderate oversold condition. Qualifies for Setup 3 income plays. Not sufficient alone for Setup 1.
Above VWAP	Price above the 21-bar VWAP. Required for Setup 2. Confirms the stock is in an uptrend rather than fighting one.

Momentum Signals

Signal	What It Means
RSI Oversold	14-period RSI at or below threshold levels. Required alongside 2SD for Setup 1. Marks selling momentum that is statistically unsustainable.
RSI Divergence	Price made a lower low recently but RSI made a higher low. Selling continues but is losing momentum. One of the strongest leading reversal signals in the system.
MACD Bullish	MACD bullish cross or histogram turning positive. Confirms momentum is flipping from selling to buying pressure. Ideally appears 1-3 days after the RSI oversold reading.

Quality Signals

Signal	What It Means
Volume	Volume meaningfully above the recent average. High volume on an oversold setup signals institutional involvement — informed buyers stepping in, not just retail panic reversing.
Above MA50	Price above the 50-day moving average with a rising slope. Distinguishes a healthy pullback in an uptrend from a structural breakdown. Below MA50 with a falling slope is a negative signal.
CMF Accumulation	Chaikin Money Flow in positive territory. Net volume occurring on up-closes while price is oversold signals quiet institutional accumulation — buyers absorbing supply.
CMF Distribution	Chaikin Money Flow in negative territory. Net selling pressure on down-closes. The selling is deliberate, not panic — a meaningful headwind against a mean-reversion thesis.

Technical Score (T Score)

The Technical Score is the sum of all signal scores minus any penalties. The theoretical maximum is 19 (every positive contributor firing with no penalties). In practice, scores of 10 or higher are exceptional and rare.

T Score	What It Means
10+	Exceptional confluence — near-perfect alignment of price, momentum, and quality signals. Size toward the maximum for your zone.
8–9	High confidence. Strong primary signals with only minor offsets. Size near the top of your zone range.
6–7	Good setup. Solid signals with some counterweights. Use minimum viable size for your zone.
4–5	Marginal. Recognizable pattern but notable concerns. Extra scrutiny required. Consider passing if the zone is not supportive.
Below 4	Not shown. The screener filters these out by default.

The screener also applies negative contributors automatically. Signals like CMF Distribution, a falling 50-day MA, stocks near earnings, or stocks that have already crashed significantly all reduce the T Score. A setup that looks strong visually can score lower than expected because the system has already penalized those headwinds.

Score vs. Grade

The T Score drives how the screener ranks and filters results. The Workbook Grade (A+ through F) is different — it is a percentage of the possible checklist points for a specific play type. A T Score of 8 and a Grade A are both strong signals, but they measure different things.

Fundamental Score (F Score)

The F Score (0–9) evaluates each stock's financial health using three pillars, each worth 0–3 points. It appears as F:N on every card and in the detail modal. The F Score refreshes weekly on Sundays from the latest available quarterly data.

Pillar	What It Measures
Health (0–3)	Debt-to-equity ratio vs. sector benchmarks, plus current ratio ≥ 1.5 . Low leverage and strong liquidity score higher. Sector matters — a D/E ratio that is fine for Utilities would be alarming for Technology.
Profit (0–3)	Net margin vs. sector benchmarks, plus a bonus point for any positive profit margin. Strong margins relative to industry peers score higher.
Growth (0–3)	Revenue growth year-over-year (high growth scores more, contracting revenue penalizes), plus a bonus for positive and growing EPS. Measures whether the business is expanding.

F Score	What It Means
8–9	Exceptional fundamentals. Strong across all three pillars. Highest conviction for trend trades (Setup 2).
6–7	Solid. Outperforms in most areas with minor weakness. Good fundamental support for any setup type.
4–5	Average. Mixed signals — some strength offset by weakness. Not a disqualifier for Setup 1 mean-reversion plays.
0–3	Weak. Leverage, margin, or growth concerns. Use caution on trend entries. Acceptable for short-term mean-reversion only.

Tickers with no fundamental data (recent IPOs, missing quarterly filings) show F:— on the card. These tickers only appear when you sort by Technical Score or use the unfiltered view. They are excluded from Total Score sorting.

Total Score

Total Score = Technical Score + Fundamental Score. It is displayed on every card as T:X F:X — for example, T:9 F:7 means a Technical Score of 9, a Fundamental Score of 7, and a Total Score of 16.

The theoretical maximum Total Score is 28 (T score of 19 + F score of 9). In practice, achieving all positive technical signals simultaneously with no penalties is extremely rare. A Total Score of 16 or above is exceptional. A T:10+ combined with F:7+ is the highest-conviction entry signal in the system — the stock is both statistically oversold AND financially healthy.

Scenario	What to Do
High T + High F	Highest conviction. Full size within zone limits. Both the price action and the business quality support the trade.
High T + Low F	Good technical setup, weak fundamentals. Valid for short-term mean-reversion (Setup 1) but avoid trend entries (Setup 2). Keep size smaller.
Low T + High F	Fundamentally strong but technically not at a good entry point yet. Watch the stock. Wait for a Setup 1 or Setup 2 signal before entering.
Low T + Low F	Avoid. No edge from either direction.

Reading a Screener Card

Each card shows the critical information at a glance:

- **Ticker and setup badge (S1/S2/S3)** in the top-left
- **Score badge** in the top-right: Total score with T (technical) and F (fundamental) breakdown
- **Company name and sector** below the ticker
- **Current price and day change** with VWAP trend direction
- **Alert banner** (orange) if something needs verification, such as a declining VWAP on a Setup 2 entry
- **Signal chips** (green = firing, grey = not firing, orange = CMF distribution warning)
- **Earnings indicator** (E:Nd) showing days until next earnings report

The Detail Modal

Click any card to open the full detail modal. This is where you get the complete picture before deciding whether to open the Workbook.



Detail modal for EHTH (Setup 2). Shows VWAP price levels, all ten signals with YES/NO, fundamentals breakdown, and ranked options scenarios.

The modal adds several key items not visible on the card:

- **VWAP price levels panel:** Shows the exact price at each standard deviation band (2SD+, 1SD+, VWAP, 1SD-, 2SD-). Use these as strike reference points for options plays.
- **Full signal detail:** Each signal shows YES or NO with an info button explaining the calculation.
- **Fundamentals panel:** Revenue, EPS, margins, D/E ratio, and market cap from the latest quarterly filing.

- **Options Scenarios:** Ranked best to worst for this setup type and your account size. Includes estimated capital required per strategy and earnings warning flags.
- **Open in TradingView:** Opens this ticker's chart directly in TradingView so you can study the price action before committing to a trade plan.
- **Open in Workbook:** Pre-fills the Workbook with this ticker, setup, score, and active signals. The fastest path from screener to trade plan.

Using the Filter Bar

The filter bar controls which results appear. Key filters:

- **Setup filter:** Show All, Setup 1, Setup 2, or Setup 3. In DEPLOY zones, filter to S1 only. In STANDARD zones, show all.
- **Score type:** Switch between Technical, Fundamental, or Total score for sorting.
- **Min Score:** Default is 4. Raise to 7+ in higher Pulse zones where you need stronger confirmation.
- **Sector filter:** Useful when combining with Sector Rotation data. If XLK is the top-ranked sector, filter the screener to Technology.
- **Price range:** Filter by stock price to match your account size and options buying power.

Workflow: Your Evening Screener Review

The screener updates each evening after 5:45 PM ET. This is your nightly review process.

Step 1 Check the Pulse zone first

- Confirm the current zone before opening the Screener. Your filter choices depend on it.
- **DEPLOY zone:** Filter to Setup 1 only. Sort by Technical Score.
- **STANDARD zone:** Show all setups. Sort by Total Score. Min score 7+.
- **CAUTION zone:** Setup 3 income plays or the very highest-scoring S1 entries only. Min score 9+.
- **MINIMUM zone:** Close the screener. Hold cash. You are not looking for entries tonight.

Step 2 Scan the top results

- Review the top 5-10 cards by score. Look at which signals are firing, the earnings indicator, and the VWAP trend direction.
- Flag anything with CMF Distribution (orange chip) for extra scrutiny. Distribution means sellers are deliberate, not panicked.
- Earnings within 7 days (red): Avoid long options. Acceptable for put-selling strategies only if you understand the assignment risk.

Step 3 Open modals for your top 2-3 candidates

- Check the VWAP levels panel for strike selection context.
- Review the fundamentals panel. A strong F score adds conviction to technical setups.
- Look at the ranked Options Scenarios for capital requirements.

Step 4 Send the best candidate to the Workbook

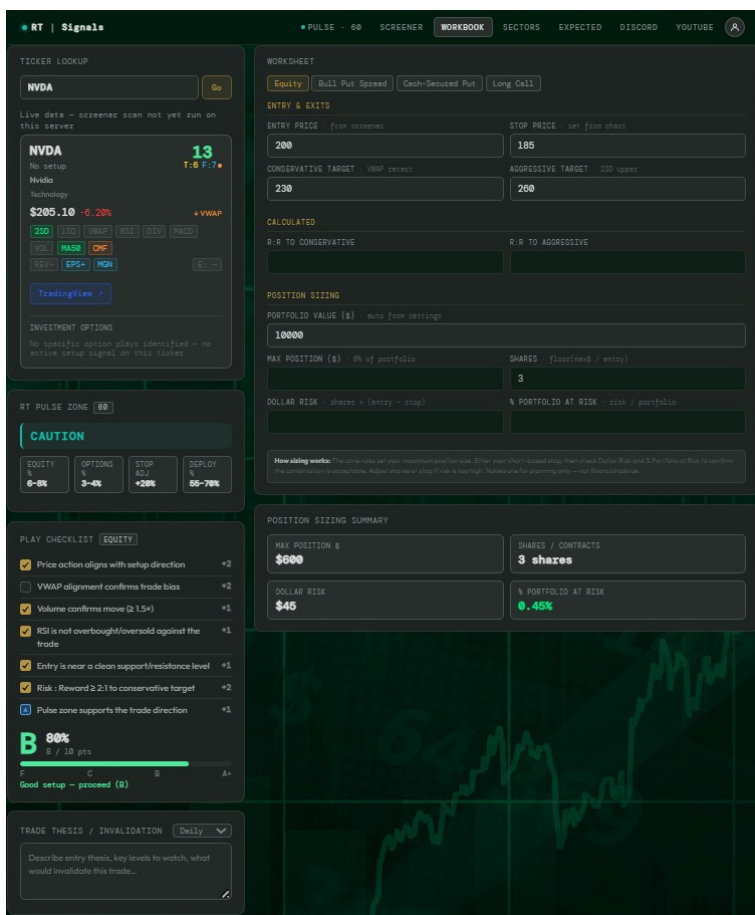
- Click Open in Workbook for your top pick. Signals and setup type carry over automatically.
- If nothing meets your standards tonight, that is the correct answer. Forced trades are the most expensive ones.

Part 3: The Workbook

The Workbook is where a screener result becomes a trade plan. It forces you to answer three questions before committing capital: Is this setup worth entering? How should I size it? What is my exact plan?

Every trade in this system should go through the Workbook, even if you have been using the platform for years. The checklist exists specifically to prevent you from skipping steps when you are excited about an opportunity.

The Four Panels



Workbook with NVDA pre-filled from the screener. Lookup card (top-left), Checklist (middle-left), Worksheet (middle-right), Notes (bottom).

1. Ticker Lookup

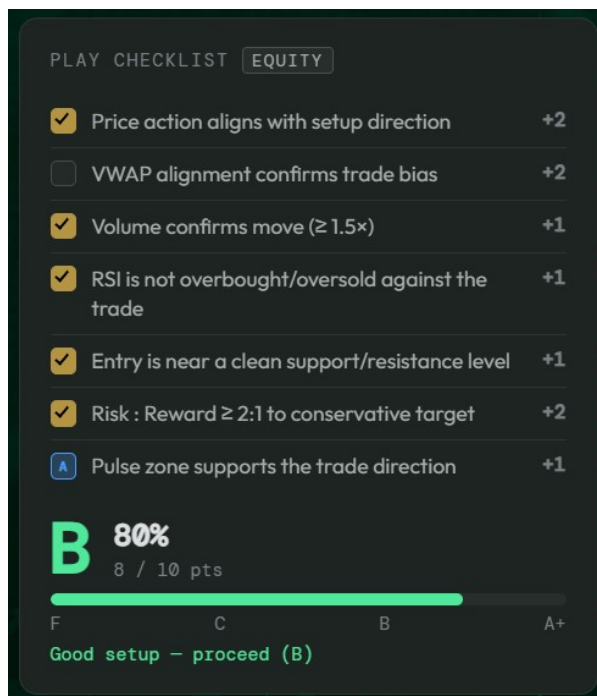
The top-left panel runs a live single-ticker scan the moment you open the page. It shows the current setup classification, active signals, the live Pulse zone badge, and investment options ranked for this specific setup and account size.

If you arrived via the Screener's Open in Workbook button, the ticker and setup are pre-filled. You can also type any ticker manually and click Go to run a fresh scan.

2. Play Checklist

The checklist is the core of the Workbook. It is a weighted list of conditions that must be true for the current setup and investment strategy to be valid. Each condition has a point value. Auto-fill items are populated from your screener signals and the live Pulse score.

The play type selector (Equity, Bull Put Spread, Cash-Secured Put, Long Call, Bull Call Spread, Short-term Call, LEAP Call, Iron Condor) changes the checklist entirely. Each play type has its own set of conditions relevant to that specific strategy.



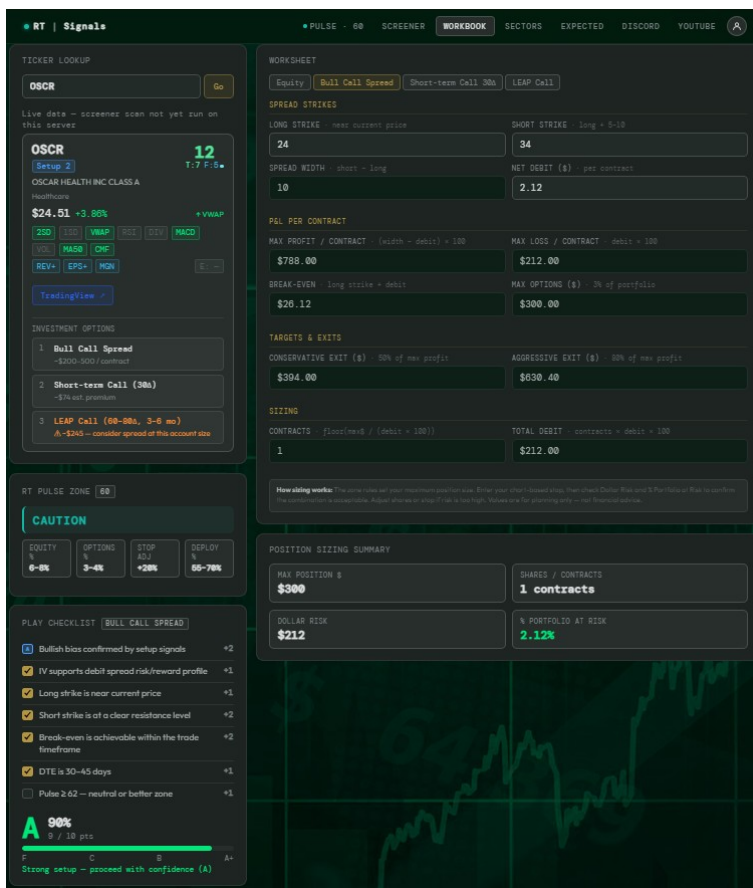
Equity checklist, 8/10 points, Grade B. "Good setup - proceed." The grade bar shows position on the F-to-A+ scale.

Grade thresholds:

Grade	Threshold and Action
A+ / A	90%+ of possible points. Exceptional setup. Size toward the top of your zone range.
B	75-89%. Good setup. Proceed with standard sizing for your zone.
C	60-74%. Marginal. Consider minimum viable size or pass.
D	50-59%. Not recommended. Find a better setup tonight.
F	Below 50%. Pass. The confluence is not there.

3. Worksheet

The Worksheet is the position sizing calculator. It adapts to the selected play type.



Bull Call Spread worksheet for OSCR (Setup 2). Strike inputs, P&L per contract, targets, and final sizing with portfolio % at risk.

For equity plays, the worksheet calculates risk per share, R:R ratio, maximum shares, and total dollar risk from your entry, stop, and target inputs.

For options plays, the worksheet adapts to the strategy. For a Bull Call Spread, you enter the long and short strikes; the worksheet calculates max profit, max risk, break-even, and number of contracts based on your portfolio value and zone sizing limits.

All calculations reference the Pulse zone's Max Equity or Max Options limits. If your calculated position size exceeds the zone limit, the worksheet flags it. The Pulse-defined limits always override your worksheet math.

4. Notes and Trade Thesis

The bottom panel is a free-text area for your thesis, the reason you are entering, and your invalidation conditions, the specific price action or time condition that would tell you the setup is wrong.

Writing the invalidation condition before entry is the most valuable discipline in the system. "I am wrong if price falls below the 2SD band again on high volume" is far better than "I'll figure out when to exit when I need to."

Notes auto-save to your browser on every keystroke and persist across sessions for each ticker and setup combination. If you come back to the same ticker next week, your notes are still there.

Workflow: Planning a Trade from Screener to Entry

Step 1 Arrive from the Screener (or type the ticker manually)

- Click Open in Workbook from the screener modal. Ticker, setup, score, and signals are pre-filled.
- Confirm the Pulse Zone badge at the top. If the zone changed since the screener scan, the badge shows the current reading.

Step 2 Select your play type

- Choose the specific strategy you intend to use from the play selector tabs.
- **Setup 1 in DEPLOY/FEAR zone:** Start with Bull Put Spread or Cash-Secured Put.
- **Setup 2 in STANDARD zone:** Bull Call Spread or Short-term Call.
- **Setup 3 in CAUTION zone:** Bull Put Spread (wide) or Iron Condor.
- The checklist changes immediately when you switch play types.

Step 3 Work through the checklist

- Auto-fill items (marked with a small icon) populate from screener data and the live Pulse. Review them for accuracy.
- Manually check each remaining item. Be honest. Checking a box you are unsure about is how you talk yourself into bad trades.
- **Minimum to proceed:** Grade B (75%+) in STANDARD zones. Grade A in CAUTIOUS zones. Any grade is valid in DEPLOY zones if the setup qualifies.

Step 4 Fill the worksheet

- Enter your exact entry price, stop, and target (equity) or strike prices (options).
- Confirm the calculated position size is within your zone's Max Equity or Max Options limit.
- **For options:** Check the break-even price. If you are trading SPY or QQQ options, use the Expected Moves page to confirm your break-even is within the statistical range. For individual stocks, check whether the required move is realistic given the stock's recent average daily range.

Step 5 Write the thesis and invalidation

- One sentence thesis: what needs to happen for this trade to work.
- One sentence invalidation: what price action tells you the thesis is wrong.
- Set price alerts in your broker before you close the Workbook.

Part 4: Investment Strategies Reference

The screener and workbook surface six options strategies plus straight equity trades, each matched to specific setup types and Pulse zones. This section explains each strategy, when to use it, and what to watch for.

Strategy Overview

Strategy	Type	Best Setup	Best Pulse Zone	Risk Profile
Bull Put Spread	Credit	S1, S3	Pulse <= 61	Capped risk (spread width minus premium). Keep if stock stays above short strike.
Cash-Secured Put	Put selling	S1, S3	Pulse <= 61	Must buy stock at strike if assigned. Premium collected if stock stays above strike.
Long Call	Directional	S1	Pulse >= 62	Risk is premium paid. Unlimited upside above strike. IV crush risk near earnings.
Bull Call Spread	Debit	S2	Pulse >= 62	Risk is debit paid. Capped at spread width minus debit. Requires known price target.
Short-term Call (30D)	Directional	S2	Pulse >= 67	Risk is premium paid. Requires strong uptrend. 21-45 day DTE. OTM strike.
LEAP Call (60-80D)	Leveraged	S2	Pulse >= 67	High-delta call (10-20% of stock cost). 3-6 month DTE. Participates in uptrend with leverage.
Iron Condor	Range-bound	S3	Pulse 55-66	Combined credit. Both sides capped. Requires stock to stay within expected range. 21-45 DTE.

Bull Put Spread (Primary Strategy)

This is the highest-frequency strategy in the system, particularly in Fear and Crisis zones. You sell a put at or below the 2SD support level and buy a lower put for protection. If the stock stays above your short strike at expiration, you keep the full premium.

The short strike at or below 2SD gives you a statistical cushion. Even if the stock continues to fall slightly, you can still win. The defined maximum risk (spread width minus premium) makes it appropriate for any account size.

Key inputs to check in the Workbook: Short strike at or below 2SD support. Break-even well below current price. 21-45 DTE. IV rank elevated (selling at fair value). Pulse at or below 61.

Cash-Secured Put

Functionally similar to the Bull Put Spread but without the long put protection. You sell a put and hold enough cash to buy 100 shares at the strike price if assigned. Higher capital requirement but higher premium collected.

Best used when you are genuinely willing to own the stock at the strike price. Assignment is not a failure if you planned for it, it just means you now own shares at a statistical support level.

Key watch: Avoid near earnings. Assignment risk plus IV crush is a difficult combination to manage.

Long Call

A directional bet on a stock recovering from Setup 1 oversold conditions. You pay premium for the right to participate in the bounce. Unlike put-selling, you benefit from IV expansion (common when a Fear-zone stock recovers).

Requires: Pulse at or above 62. Near-term catalyst or strong mean-reversion signal. IV rank below 50 (buying premium is expensive above 50). 30-45 DTE minimum. Target exit at 2x premium paid.

Bull Call Spread

The primary Setup 2 strategy when you have a specific price target. Buy a call near the money, sell a call at your target. The spread caps your profit but reduces the premium paid significantly, lowering the break-even.

Requires: Clear price target above the short strike. 30-45 DTE. Pulse at or above 62. IV supports debit spread risk/reward.

Short-term Call and LEAP Call

Both are directional momentum plays for Setup 2. The Short-term Call (30 delta, 21-45 DTE) is for strong near-term momentum with a clear catalyst. The LEAP Call (60-80 delta, 3-6 months DTE) is for high-conviction uptrends where you want leveraged participation over a longer timeframe.

LEAPs behave more like stock with leverage. The high delta (0.60-0.80) means they move almost dollar-for-dollar with the stock but cost 10-20% of the stock price. They are only appropriate in Bullish or better Pulse zones with strong Setup 2 confirmation.

Iron Condor (Advanced)

A range-bound income strategy for Setup 3. You sell both a put spread below the market and a call spread above it, collecting combined premium. If the stock stays within the expected range through expiration, you keep both premiums.

Requires: Price trading near the center of the 1SD bands. Elevated IV (you are selling premium from both sides). Short strikes outside the expected move range. 21-45 DTE. Pulse in the 55-66 range (low directional bias). Do not use in strong trending environments.

Earnings Warnings

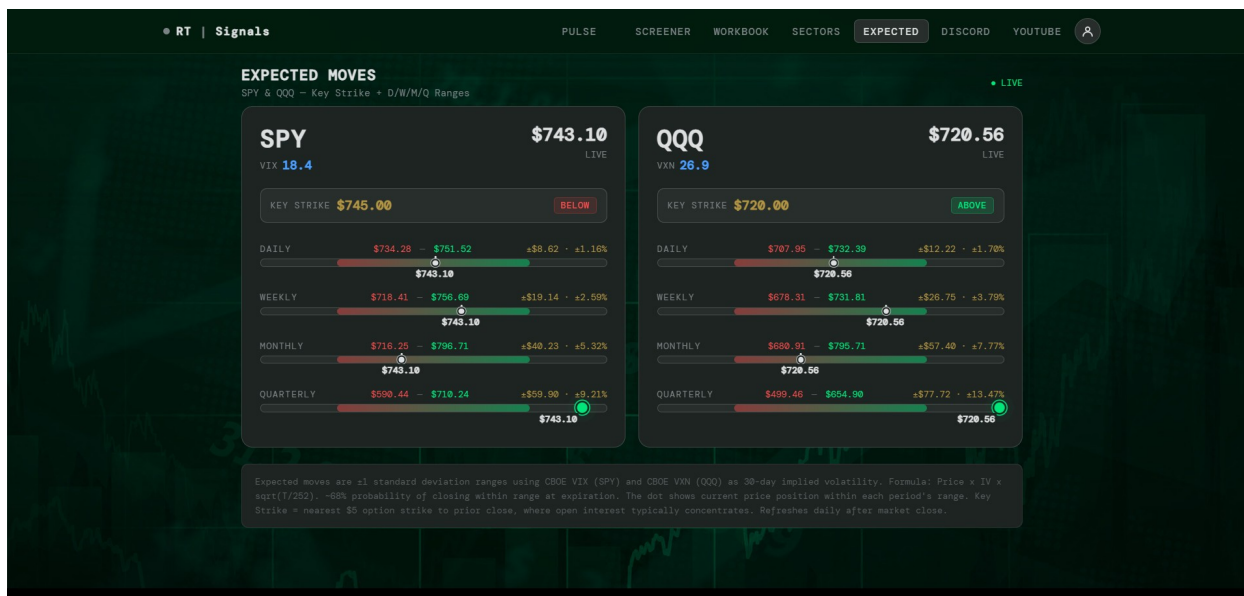
Earnings dates appear on every card and in every modal. The warning level:

- **Red badge (within 7 days):** Danger. For long options (Long Call, LEAP): do not enter. IV will collapse after the announcement regardless of direction, often destroying the position. For put-selling: be aware of gap risk on assignment.
- **Yellow badge (8-21 days):** Caution. For long options, you are accepting earnings IV risk. Reduce size. For put-selling, the elevated IV is actually favorable.
- **No badge:** No earnings within 21 days. All strategies are valid on the earnings dimension.

Part 5: Expected Moves

The Expected Moves page shows the implied price range for SPY and QQQ for the current day, week, month, and quarter. These ranges are calculated from options market data and tell you where the market expects each index to stay with approximately 68% probability.

Important: Expected Moves are calculated for SPY and QQQ only. They do not directly apply to individual stocks. Use them for options strike selection on SPY and QQQ plays, and as a general market context benchmark when evaluating individual stock setups.



Expected Moves page showing SPY and QQQ ranges. Each row shows the statistical range for that time period with a gauge indicating current price position.

How to Read the Gauge

Each time period shows a horizontal gauge with a colored band representing the expected range. A dot marks the current price position within (or outside) the band.

- **Dot in the center:** Price is near the midpoint of the expected range. No edge in either direction from this reading alone.
- **Dot near the lower band edge:** Price has moved to the statistical boundary of the expected move. This is where mean-reversion setups gain the most probability support.
- **Dot outside the band:** Price has exceeded the expected move. A statistically extreme condition. Either a strong trend day or a capitulation event. Combined with a Pulse Fear or Crisis reading, this is high-probability reversion territory.

Using Expected Moves for Strike Selection

The expected move range is the single most useful input for options strike selection:

- **For put-selling (Bull Put Spread, Cash-Secured Put):** Place your short strike below the lower boundary of the expected move. If the weekly expected move is -3%, your short strike should be at least 3% below the current price.
- **For long options (Long Call, Short-term Call):** Your break-even must be achievable within the expected move range for the options period. If the break-even requires a 5% move but the expected move is only 2%, the option is statistically overpriced for your thesis.
- **For Iron Condors:** Both short strikes should be outside the expected move for the period. This is the mathematical definition of a reasonable iron condor.

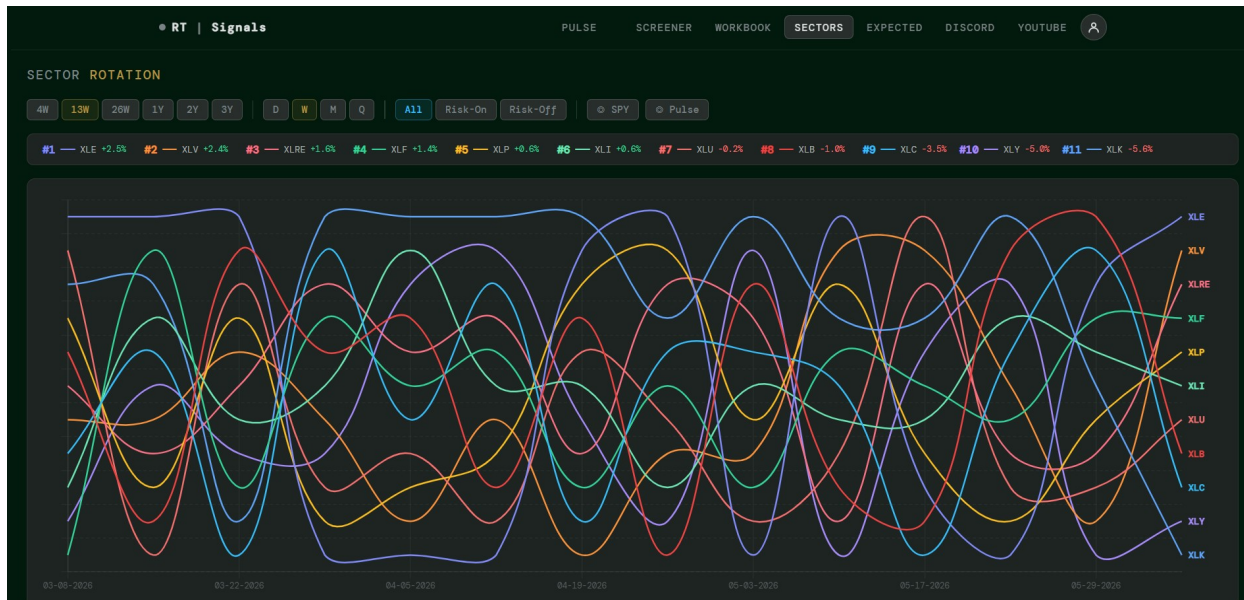
Key Strike: The platform shows the nearest \$5 increment to the prior close. This is the strike where open interest concentrates and where the market maker's hedging activity is most active. It functions as a gravitational level.

Note on Sunday readings

The gauge dots center when the weekly and monthly periods reset. If you check Expected Moves on a weekend, the dot position is not meaningful until Monday. The numbers (implied range) are still accurate.

Part 6: Sector Rotation

The Sector Rotation page tracks the relative strength of all eleven SPDR sector ETFs over your chosen time frame. It answers the question: which sectors are leading the market right now, and what does that tell you about the macro environment?



Sector Rotation bump chart, 13-week view. Each line tracks a sector's rank from 1 (strongest) to 11 (weakest). Rank labels auto-appear at the right edge.

Reading the Bump Chart

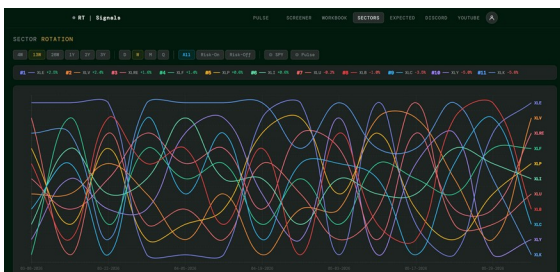
Each line represents a sector ETF. The Y-axis shows rank from 1 (top, strongest) to 11 (bottom, weakest), based on cumulative return within the selected time window.

- Line moving up on the chart = sector gaining relative strength
- Line moving down on the chart = sector losing relative strength (rank deteriorating)
- Flat lines in the top 3 = persistently leading sectors

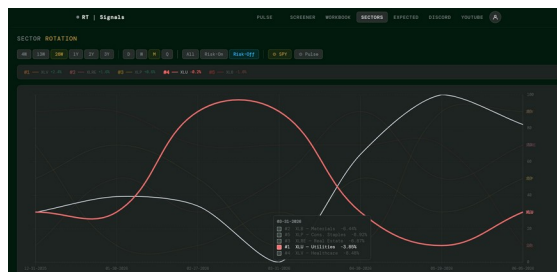
Hover over any point to see the date, sector name, rank, and cumulative return. Click a sector chip in the legend to highlight that sector across the full chart.

Risk-On vs. Risk-Off Rotation

The eleven sectors divide into two camps:



All sectors: bump chart view



Risk-Off filter: XLU highlighted, SPY declining

Category	Sectors
Risk-On	XLK (Technology), XLF (Financials), XLY (Consumer Discretionary), XLI (Industrials), XLE (Energy), XLC (Communication Services). Lead in bull markets.
Risk-Off	XLV (Healthcare), XLP (Consumer Staples), XLU (Utilities), XLB (Materials), XLRE (Real Estate). Lead when investors rotate to defensive positions.

The Risk-Off chart above shows XLU (Utilities) rising to rank 1 while SPY (white line, right axis) declines simultaneously. This is the textbook risk-off rotation: investors leaving equities for defensive sectors correlates directly with broader market weakness.

When Risk-Off sectors persistently lead (ranked 1-4 for multiple weeks), it is a macro confirmation of the Fear or Caution Pulse readings. When Risk-On sectors lead, the Pulse is likely in Neutral or Bullish territory.

How to Use Sector Rotation with the Screener

- Identify the top 2-3 ranked sectors in the current time window.
- Open the Screener and use the Sector filter to narrow results to those sectors.
- In DEPLOY zones with Risk-Off rotation: focus screener on defensive sector Setup 1 entries. Defensive stocks in Utilities and Consumer Staples tend to hold better during broad selloffs, giving cleaner mean-reversion setups.
- In STANDARD zones with Risk-On rotation: focus screener on leading sectors for Setup 2 trend entries. Strong sectors in strong markets produce the cleanest trend swings.

Sector Condition	What It Suggests
Risk-Off sectors ranked 1-3	Defensive rotation is underway. Combine with Pulse zone to confirm fear environment. Favor Setup 1 entries in defensive sectors.
Risk-On sectors ranked 1-3	Broad market participation. Confirms STANDARD or BULLISH Pulse readings. Favor Setup 2 trend entries in leading sectors.
Mixed (no clear leader)	Rotational market with no clear directional bias. Favor Setup 3 income strategies. Wait for clarity before aggressive deployment.

Part 7: The 7 Confluence Rules

These rules are not guidelines. They are the structural logic that makes the system work. Every tool in the platform, every checklist item, every sizing limit, implements one or more of these rules. Ignoring a rule is not a shortcut; it is removing the edge.

Rule 1: Pulse First, Setup Second

Never override the Pulse zone. If the Pulse says MINIMUM, do not deploy even a perfect Setup 1 with a score of 12. The macro environment is larger than any individual setup. The best technical setups in MINIMUM zones fail more often than they should because the macro is working against them.

If you are in MINIMUM and a Setup 1 shows up with a score of 11, write it down. Check the Pulse tomorrow. If the zone improves to CAUTIOUS or better, it may still qualify.

Rule 2: Confluence Score Drives Size

Within a zone, use the checklist grade to scale between the zone's minimum and maximum position size. A score of 10+ (grade A) in FEAR earns the maximum equity allocation for that zone. A score of 6 (grade C) in FEAR earns the minimum.

This is the mechanism that prevents you from going maximum size on a mediocre setup just because the zone is favorable. Zone defines the range. Score defines where within that range you land.

Rule 3: Mean Reversion Is the Primary Edge

Setup 1 is the backbone of the system. Put-selling at the 2SD band in a Fear or Crisis Pulse zone is the highest-probability play in the entire platform. The combination of statistical price extremes and macro fear extremes creates a confluence that has historically resolved in the same direction the vast majority of the time.

Everything else in the system, the trend trades, the income plays, is supplementary. If you only ever traded Setup 1 in Fear and Crisis zones, you would capture most of the system's edge.

Rule 4: Trend Trades Require Trend Support

Setup 2 is only valid when the Pulse is in Neutral or better (score 62 and above). Trading Setup 2 in a Fear environment is fighting the macro. The individual stock may look perfect technically, but when the market is in fear mode, the macro headwind dominates. Trend setups in fear environments fail at dramatically higher rates than in supportive environments.

When in doubt: if the Pulse is below 62, do not take new Setup 2 entries.

Rule 5: Cash Is a Position

In Bullish, Extended, and Extreme zones, holding cash is the correct trade. The cash built in greed phases is the ammunition for the next fear cycle. Traders who are fully deployed going into a Fear or Crisis period have nothing to deploy at the best prices. Traders who built cash in Extended zones are the ones buying at Crisis.

Holding cash in a rising market feels wrong. That discomfort is the discipline. The payoff is having capital available when everyone else is selling.

Rule 6: Stop Adjustment Is Mandatory

Widen stops in Fear and Crisis zones because elevated VIX means elevated intraday whipsaw. Your standard chart-based stop in a normal environment will trigger on noise in a high-VIX environment. The Pulse page's Stop Adjust card tells you the exact percentage to add to your baseline stop distance.

Tighten stops in Extended and Extreme zones to protect accumulated gains. Corrections from elevated Pulse readings can be fast. A position that was profitable in BULLISH can reverse quickly once EXTREME conditions resolve.

Rule 7: Earnings Equals Position Size Reduction

Near-earnings positions should be smaller or avoided entirely for long options due to IV crush risk. Implied volatility collapses after an earnings announcement regardless of whether the stock moves in your direction. A correct directional call purchased before earnings can still lose money if IV collapses more than the price gain.

The 7-day red warning is a hard stop for long options. The 21-day yellow warning is a size reduction signal: if you must enter, take half the normal size.