

# User Manual

## AiPi TradeSim

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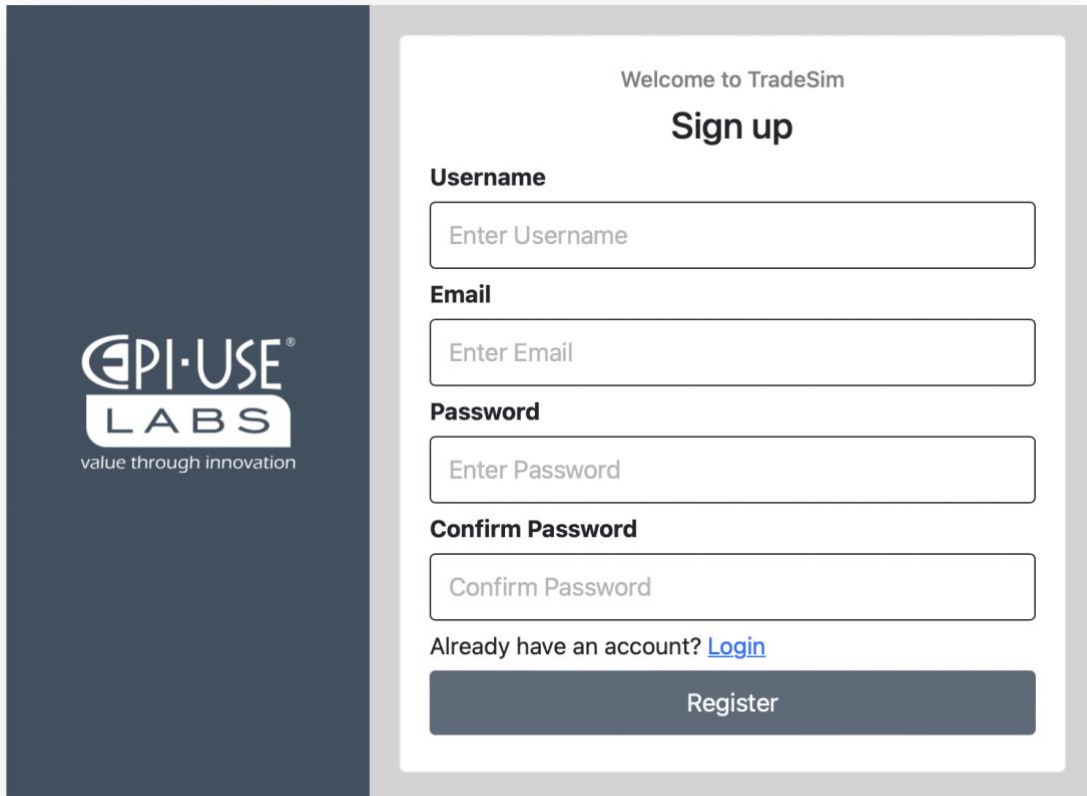
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## 1. TradeSim Description:

TradeSim is an ETF builder that creates ETFs based on a set of user defined rules. These ETF's can be monitored and compared over time and can be used in stock predictions and to view trends.

## 2. How To Use – Website Account Management

### 2.1. Sign Up/Register



Welcome to TradeSim

### Sign up

**Username**

**Email**

**Password**

**Confirm Password**

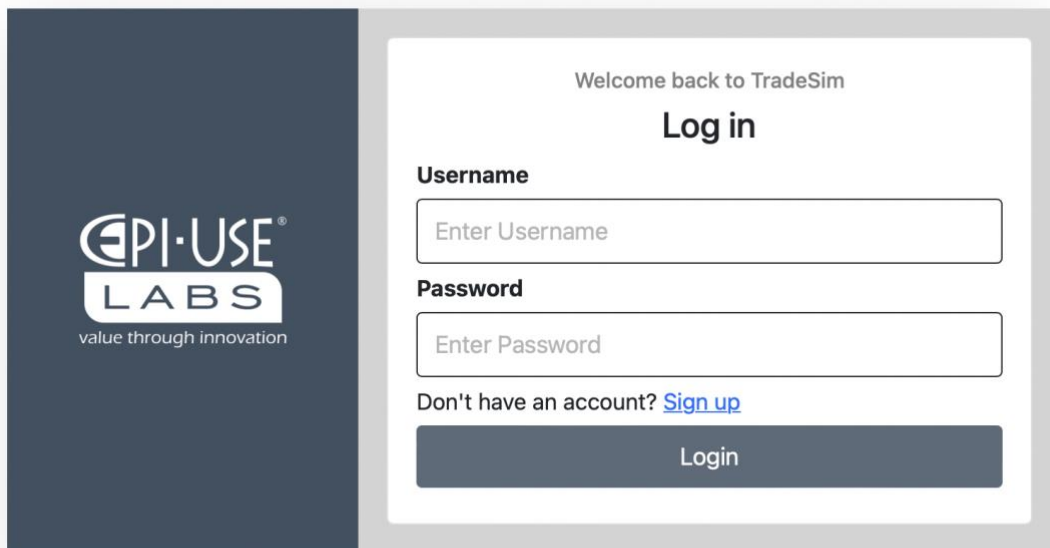
Already have an account? [Login](#)

**Register**

**EPI-USE LABS**  
value through innovation

1. Fill in your details in the spaces provided
2. Ensure all spaces are filled out
3. Ensure your email is a correct email address
4. Ensure your password is greater than 6 characters
5. Click the Register button

## 2.2. Login



1. Fill in your registered username and password
2. Click the Login button
3. If you do not have a registered account, click the Sign up link

## 2.3. The Nav-bar



1. The nav-bar is on the top right corner of all screens
2. Select which page from the nav-bar you would like to visit.

## 2.4. ETF Creation :

Creating your own mini-ETF is performed under the “Manage” tab. This can be viewed after logging into your account. Creating a mini-ETF allows you to make your own ETF with your own personalized rules to add. This will add your just created mini-ETF to your home screen for you to view, compare, visualize, and edit in the future.

## 2.4.1. Create ETF

The screenshot shows the 'Details' page for an existing ETF. The left sidebar contains a '+ CREATE ETF' button, a 'Choose ETF:' dropdown menu, an 'IMPORT ETF' button, and an 'EDIT' button. The main content area is titled 'Details' and contains two input fields: 'ETF Name' and 'Amount (\$)'. A 'DELETE ETF' button is located to the right of the 'Amount (\$)' field. Below the form, there is a '+ Add Rule' button and an 'All Rules' link.

The screenshot shows the 'Create ETF' page. The left sidebar contains a '+ CREATE ETF' button, a 'Choose ETF:' dropdown menu, and an 'EDIT' button. The main content area is titled 'Create ETF' and contains two input fields: 'mockETF' and '50000'. 'SAVE' and 'DELETE ETF' buttons are located to the right of the '50000' field. Below the form, there is a '+ Add Rule' button, a 'Select rule:' dropdown menu, and an 'ADD' button. At the bottom, there is an 'All Rules' link.

1. Navigate the Create ETF page by clicking the Manage tab on the nav-bar
2. Click on the "Create ETF" button on the left hand side of the screen – click confirm
3. Enter the name of the ETF you would like to create
4. Enter an overall amount you would like to invest into the ETF
5. Click on the "Save" button to save your ETF to the system, a drop down menu with a list of rules should appear

## 2.4.2. Add Rules:

After completing the details required on the Manage page, a dropdown of a list of rules should appear – the user can then select whichever rule they desire to add and fill in the according information for it.

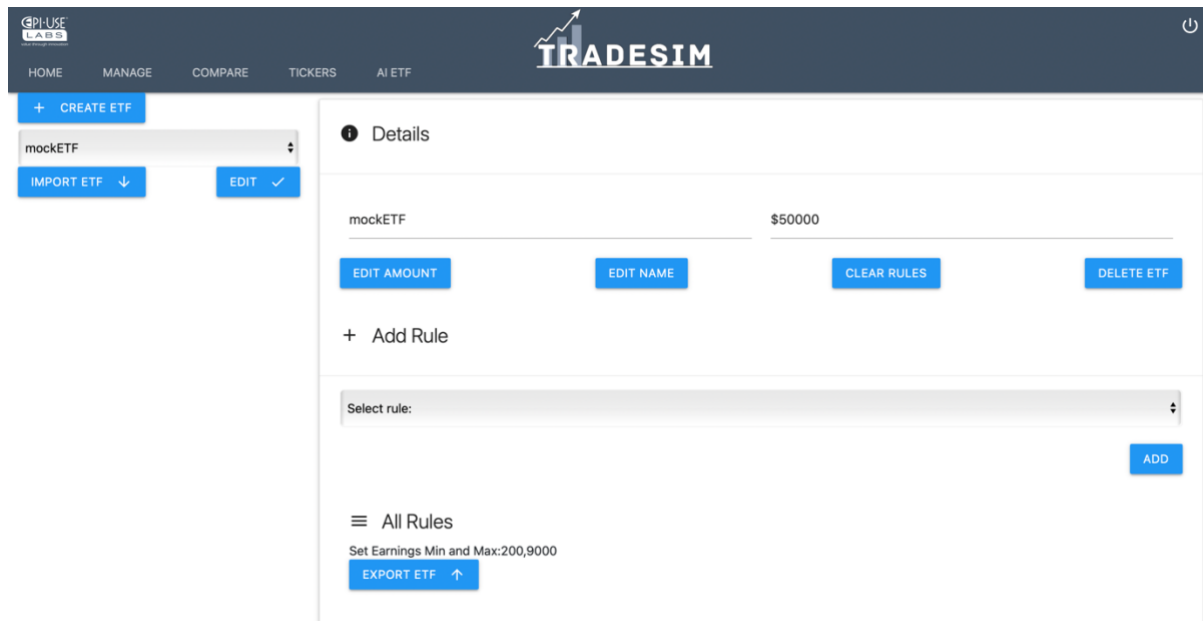
The screenshot displays the 'TRADESIM' web application interface. The top navigation bar includes 'HOME', 'MANAGE', 'COMPARE', 'TICKERS', and 'AI ETF'. A sidebar on the left features a '+ CREATE ETF' button and a 'Choose ETF:' dropdown menu with an 'EDIT' button below it. The main content area is titled 'Create ETF' and contains a form with the following elements:

- A text input field containing 'mockETF' and a value field containing '50000'.
- 'SAVE' and 'DELETE ETF' buttons.
- A '+ Add Rule' section with a dropdown menu showing 'Request certain companies by ticker.' and an 'ADD' button.
- A text input field containing 'AAPL'.
- A text input field containing '20'.
- A 'CONFIRM RULE' button.
- A section for 'All Rules' with the text 'Set Earnings Min and Max:200,9000'.

1. Select a rule from the dropdown menu.
2. Click the “add” button.
3. Enter in the corresponding information and click “confirm rule”
4. Your rule has now been applied and will add to the list of rules.
5. Repeat steps 1-3, if you want to add more rules.

### 2.4.3. Edit ETF

The Edit page can also be found under the “Manage tab in the nav-bar. This Edit page is used to edit and customize rules for any ETF that the user has already created.



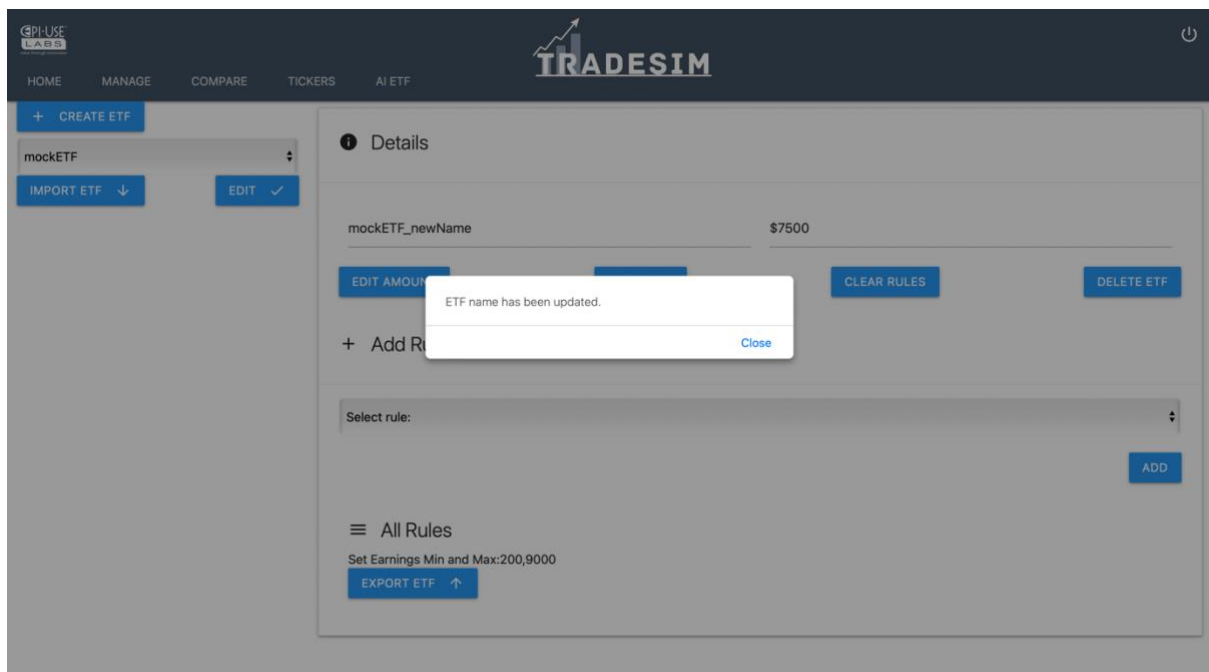
If you would like to [edit the rules](#) of an ETF:

1. Select the ETF you would like to edit from the drop down menu next to “Choose ETF” on the left side of the screen
2. Click the “edit” button with the tick on it.
3. A list of rules already created should appear for that ETF
4. To add more rules, select a rule and press the “add” button.
5. Fill in the corresponding info and click “Confirm Rule” to add that new rule.

If you would like to [clear all rules](#):

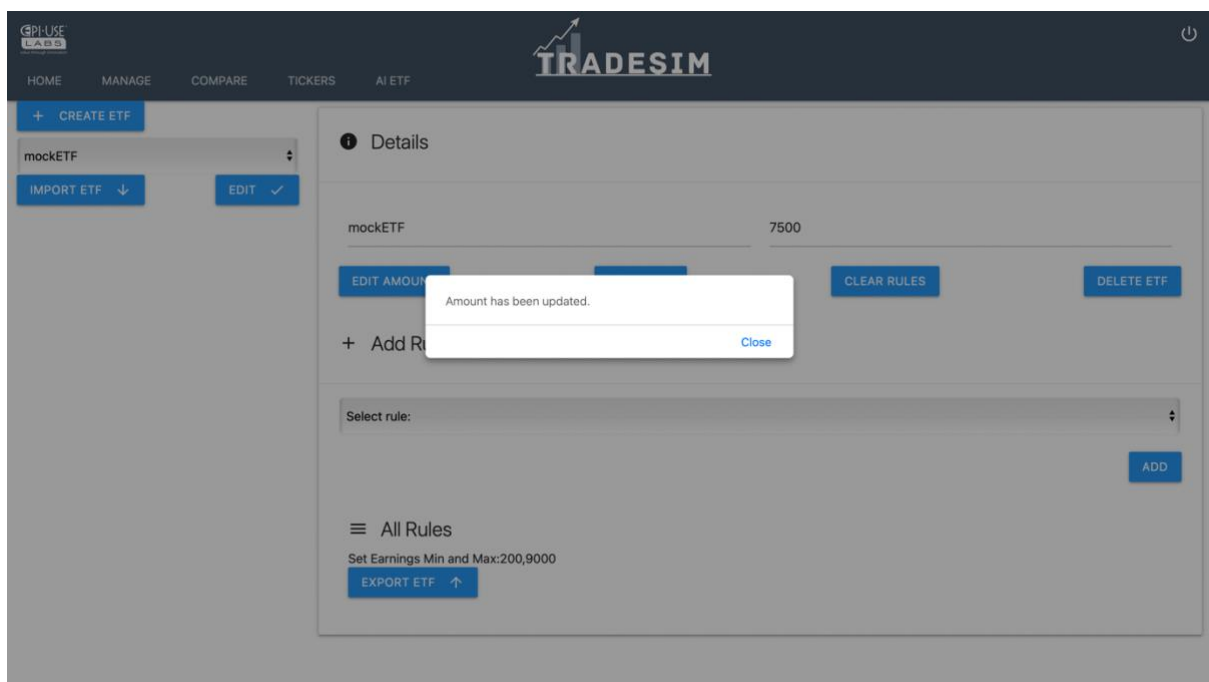
1. Select the ETF you would like to edit from the drop down menu next to “Choose ETF” on the left side of the screen
2. Click the button called “clear rules”, this should clear all the rules that the user has created.

#### 2.4.4. Edit ETF Name:



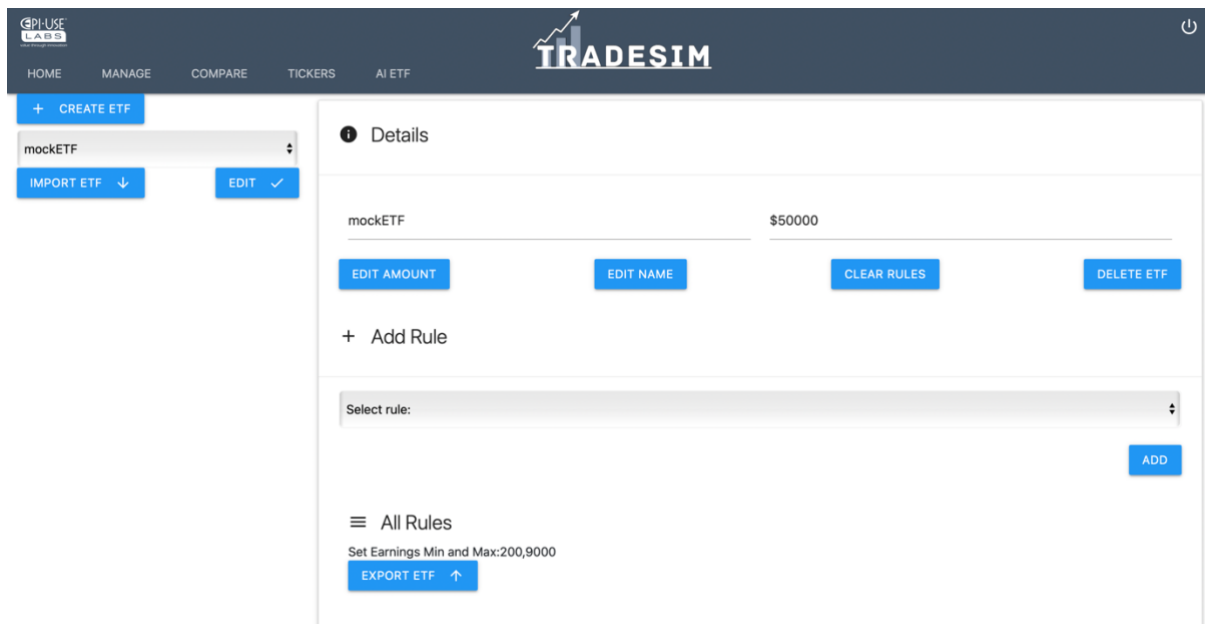
1. Select the ETF you would like to edit from the drop down menu next to “Choose ETF” on the left side of the screen.
2. Change the name of your ETF in the text field that displays the original name of the users ETF.
3. Click on the button called “edit name”, this should edit the name of the users ETF and save and store that new name in the system.

#### 2.4.5. Edit ETF Amount:



1. Select the ETF you would like to edit from the drop down menu next to “Choose ETF” on the left side of the screen
2. Change the name of your ETF in the text field that displays the original name of the users ETF.
3. Click on the button called “edit name”, this should edit the name of the users ETF and save and store that new name in the system.

#### 2.4.6. Delete ETF:



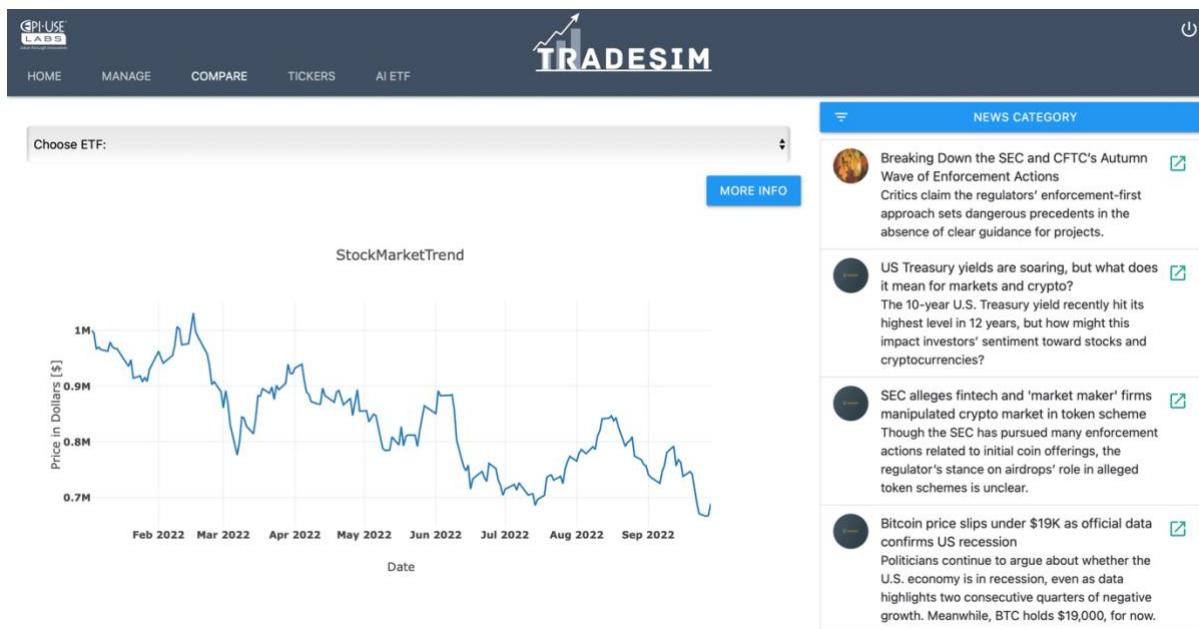
1. Select the ETF you would like to edit from the drop down menu next to “Choose ETF” on the left side of the screen
2. Select the button “delete ETF”, and the system will remove that ETF from the list of ETF’s the user has created.



## 2.5. The Home Page:

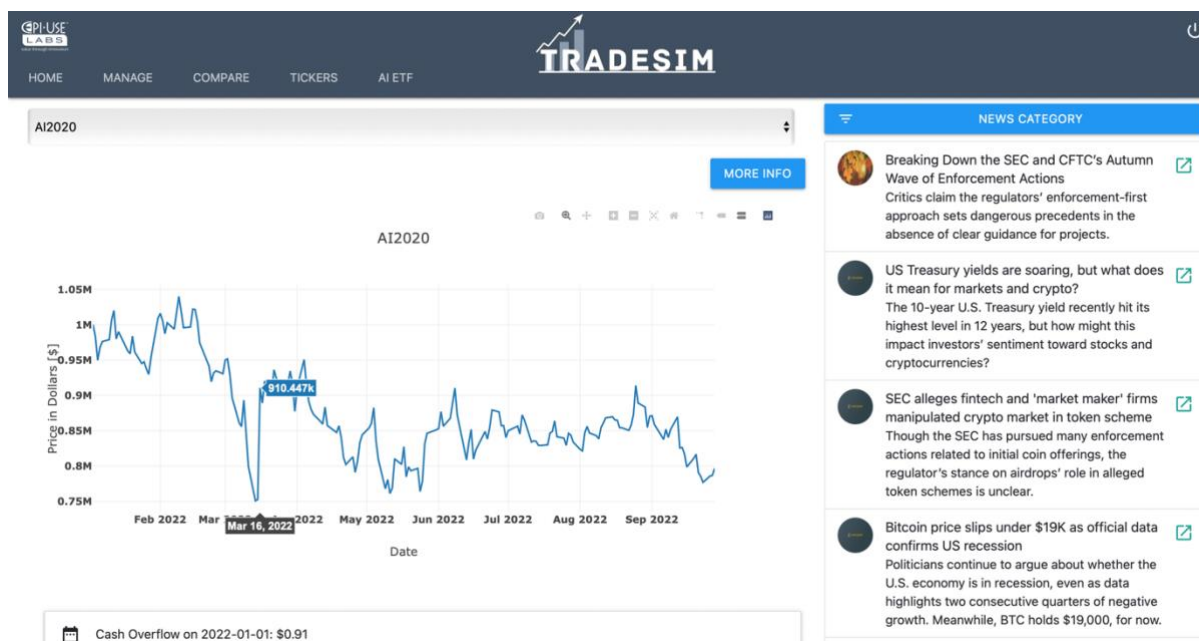
The home page is used for viewing the mini-ETF's you have created.

Once creating a mini-ETF, you can click on the "Home" tab in the nav-bar, and view your mini-ETF and see its current performance.



1. After creating your own mini-ETF, select the "Home" button on the nav-bar
2. You will see a visual of all of the ETF's you have created.

Viewing extra information about a created ETF:



1. After creating your own mini-ETF, select the “Home” button on the nav-bar
2. You will see a visual of all of the ETF’s you have created.
3. Select an ETF you would like to have more information on, in the dropdown menu at the top of the screen
4. Click the “MORE INFO” button once you have selected an option.
5. A diagram with the corresponding information about that ETF will be displayed for the user to view.

## 2.6. Compare ETF

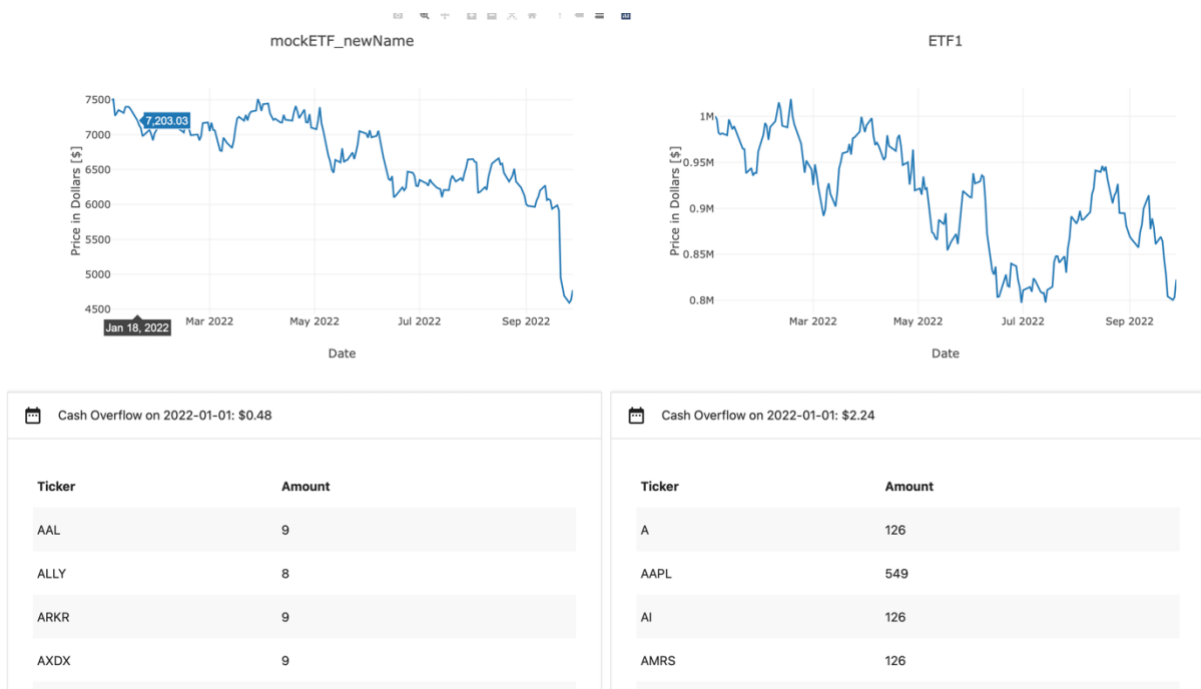
The Compare page can be found under “Compare” in the nav-bar. The compare feature is used for comparing 2 ETF’s at any point in time.

You can therefore visualize how your ETF’s are performing compared to each other – and which rules and strategies are most effective.

1. Select a date in time at which you would like to compare your ETF’s.
2. Select ETF’s using the drop downs provided.
3. Click the “COMPARE” button

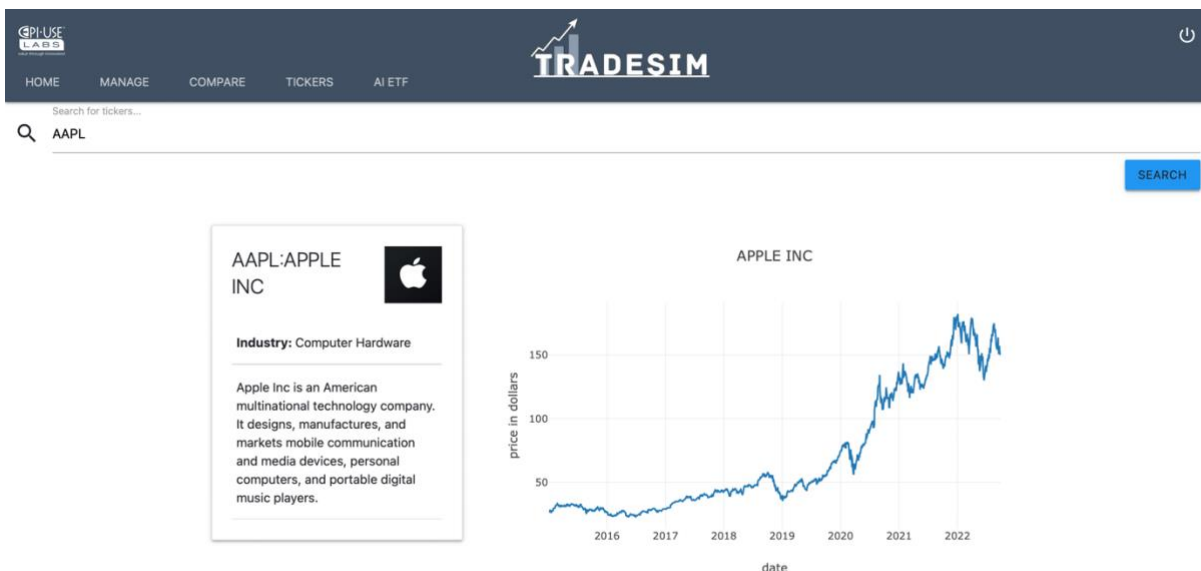
The screenshot shows the TradeSim interface for the Compare page. At the top, there is a dark blue header with the GPI-USE logo on the left and 'TradeSim' in the center. Below the header is a navigation bar with the following items: HOME, MANAGE, COMPARE, TICKERS, and AI ETF. Below the navigation bar, there is an 'i Compare' section. Underneath, there is a 'Select Date:' field with the value '29/09/2022'. Below the date field, there are two dropdown menus. The first dropdown is labeled '1st ETF' and contains the text 'mockETF\_newName'. The second dropdown is labeled '2nd ETF' and contains the text 'ETF1'. At the bottom right of the form area, there is a blue button labeled 'COMPARE'.

#### 4. Visualize your ETF's



### 2.7. The Ticker Page

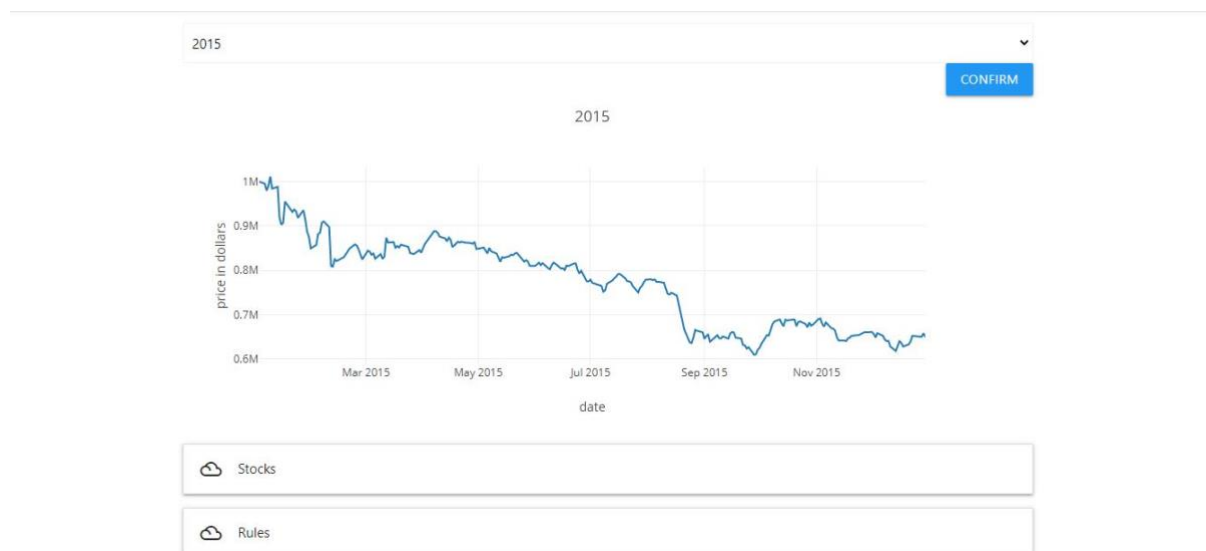
The ticker page can be found under “Tickers” in the nav-bar. This page enables the user to search for a ticker using the ticker name and view more information about that ticker.



1. Enter a ticker name in the search tab
2. Click the “SEARCH” button to the right of it
3. The page should load and the relevant information is displayed below the search bar.

## 2.8. The AI ETF Page

This page enables a user to generate the most balanced stock portfolio for a certain year – it will also display the relevant information about this ETF, with all of its rules and stocks.



1. Click on the “AI ETF” tab in the nav-bar
2. Select a year from the dropdown menu
3. Click the “CONFIRM” button
4. The relevant info will be displayed below
5. Click on the “Stocks” row to view the stocks of the ETF
6. Click on the “Rules” row to view the rules of the ETF