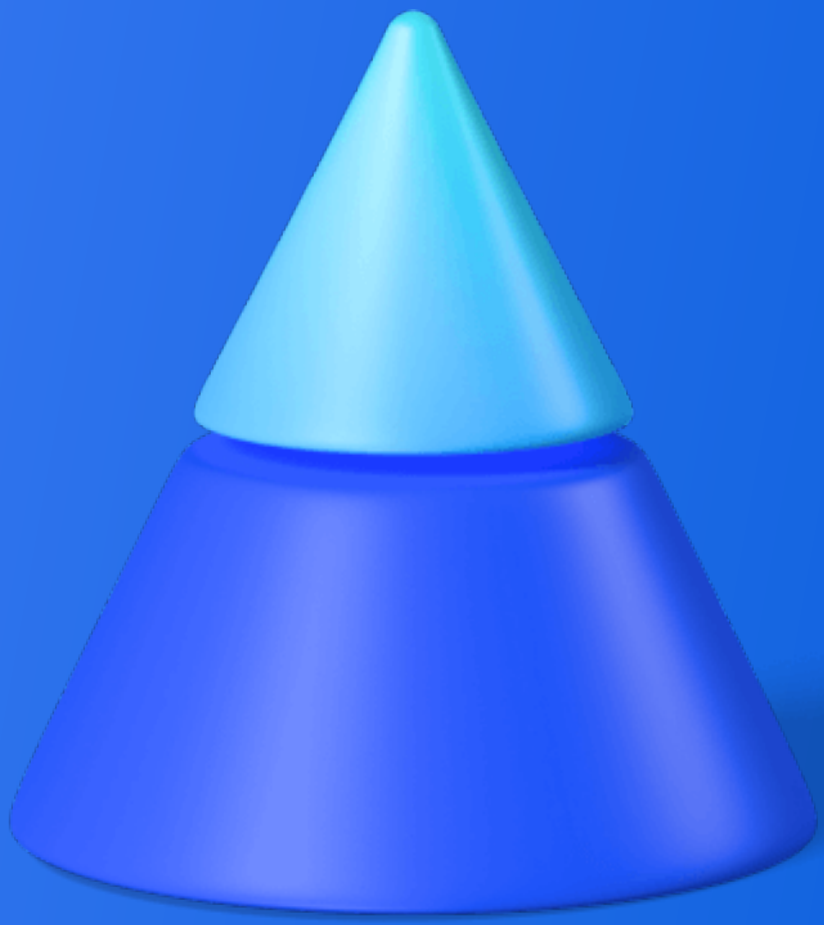
ICONOMI

Strategist Information Pack



ICONOMI

Build your Strategy & ICONOMI Profile

Before continuing reading this document we highly recommend you get familiar with the content from the Crypto Strategies section and also other articles in ICONOMI HelpCenter.

> The following articles are specially useful regarding basic information on Strategies:
>
> → Basic terms
> → What is a Crypto Strategy and how does it work?
> → The main perks of having your own Crypto Strategy

How do I create my own **Crypto Strategy** and earn a little extra?

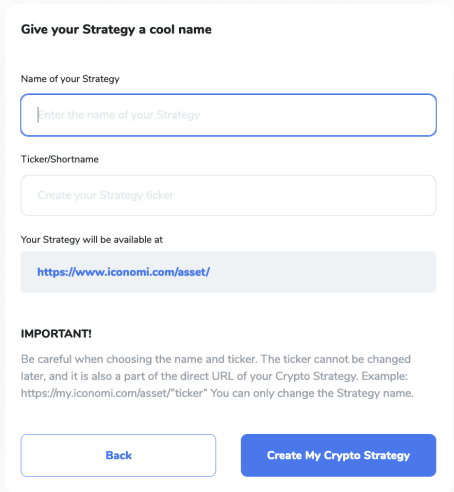
Create new Crypto Strategy: *login to your ICONOMI account > go to My Strategy > click on the "Create" button > follow the onscreen instructions ...*

1. DEFINE THE NAME OF THE STRATEGY

→ Carefully choose a memorable name and ticker.

IMPORTANT: once created, the ticker (which is also part of the direct URL to your Crypto Strategy - example: https://www.iconomi.com/asset/"ticker") cannot be changed. You can only change the Strategy name.

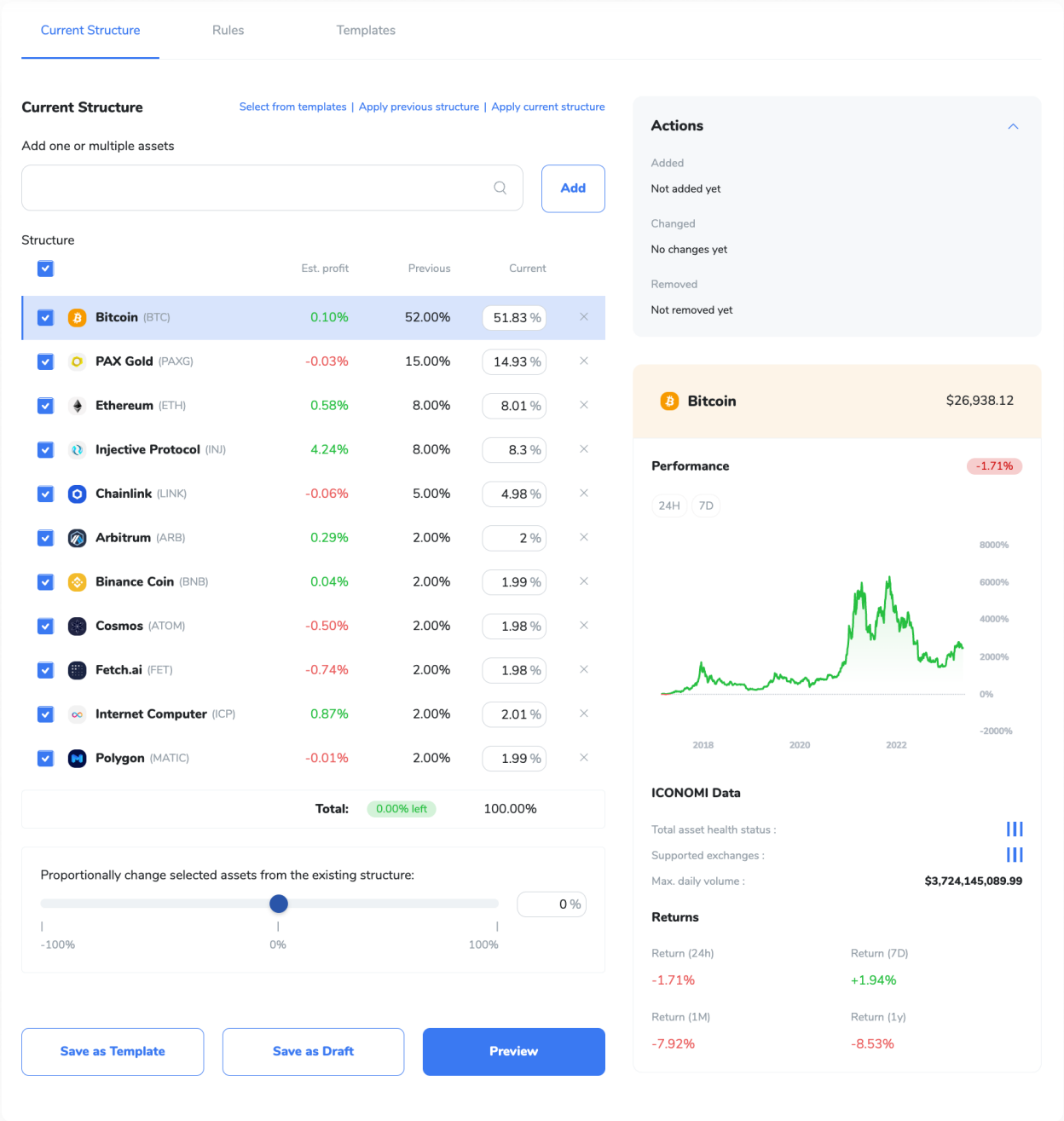
Note: when setting the strategy name please follow our Communication mandatory guidelines.



2. DEFINE STRUCTURE

→ Under Strategy “Structure” tab > “Current Structure” tab select cryptocurrencies you want to include in your Crypto Strategy and define their weights (%). You can choose from numerous cryptocurrencies.

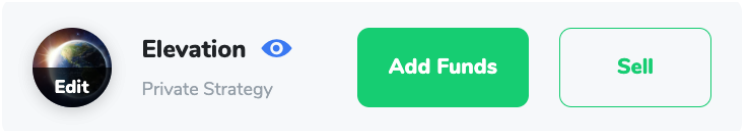
→ Build your Strategy portfolio structure (manually adjusting/changing the Crypto Strategy structure), and add or remove exposure to certain assets.



3. GO LIVE - MAKE YOUR FIRST BUY-IN

Add Funds: *login to ICONOMI account > My Strategy > go to the "Dashboard" tab > click on the "Add Funds" button*

Make the required **first investment**/seed your Strategy, which can be as low as €100 - depending on your Crypto Strategy structure. After that, your Crypto Strategy will go **from simulation mode to live mode.**



Note*: If your Strategy is in live mode and later falls* ***below 50€ ACS*** *(Assets Copying Strategy) it will be automatically* ***liquidated, deleted,*** *and credited to your Portfolio. Before this happens, you will be notified via email to take action to prevent Strategy deletion.*

4. MANAGE YOUR STRATEGY

Under Strategy “Structure” tab you can rebalance/change/adjust the structure of your Crypto Strategy anytime with one click.

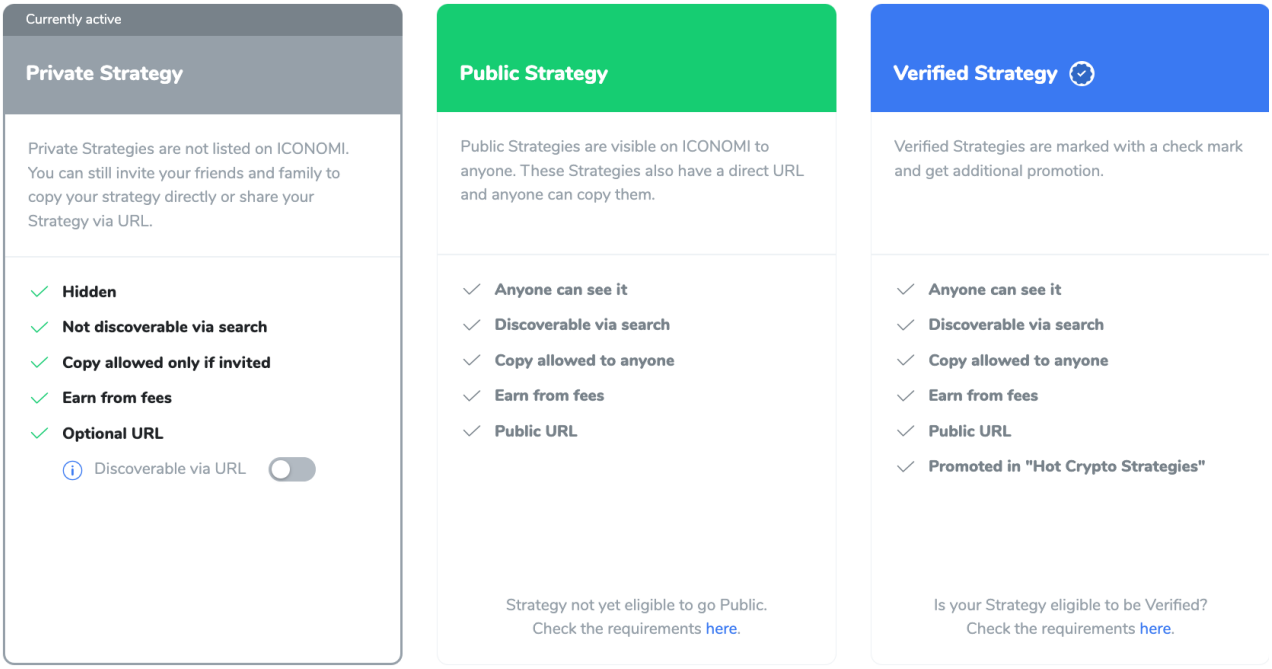
Rebalancing options:

- MANUALLY - adjusting/changing the Crypto Strategy structure
- RULES - advanced automatic rebalance triggered by preset rules
- NIGHTWATCH - simplified automatic rebalance - "Protect my assets for the next 12 hours."

5. SET STRATEGY VISIBILITY / INVITE OTHERS TO COPY YOUR STRATEGY AND ADD FUNDS

Set Strategy visibility: *login to ICONOMI account > My Strategy > go to the "Settings" tab > "Strategy visibility" tab > follow the onscreen instructions*

Set Strategy visibility. → Strategies visibility options: Private, Public, Verified.



6. SET STRATEGY FEES - EARN A LITTLE EXTRA

Under Strategy “Settings” tab > “Strategy profile” tab you can set a performance and (or) copying fee.

Note: *The Strategist (you) sets Crypto Strategy fees for an individual Crypto Strategy.*

Settings

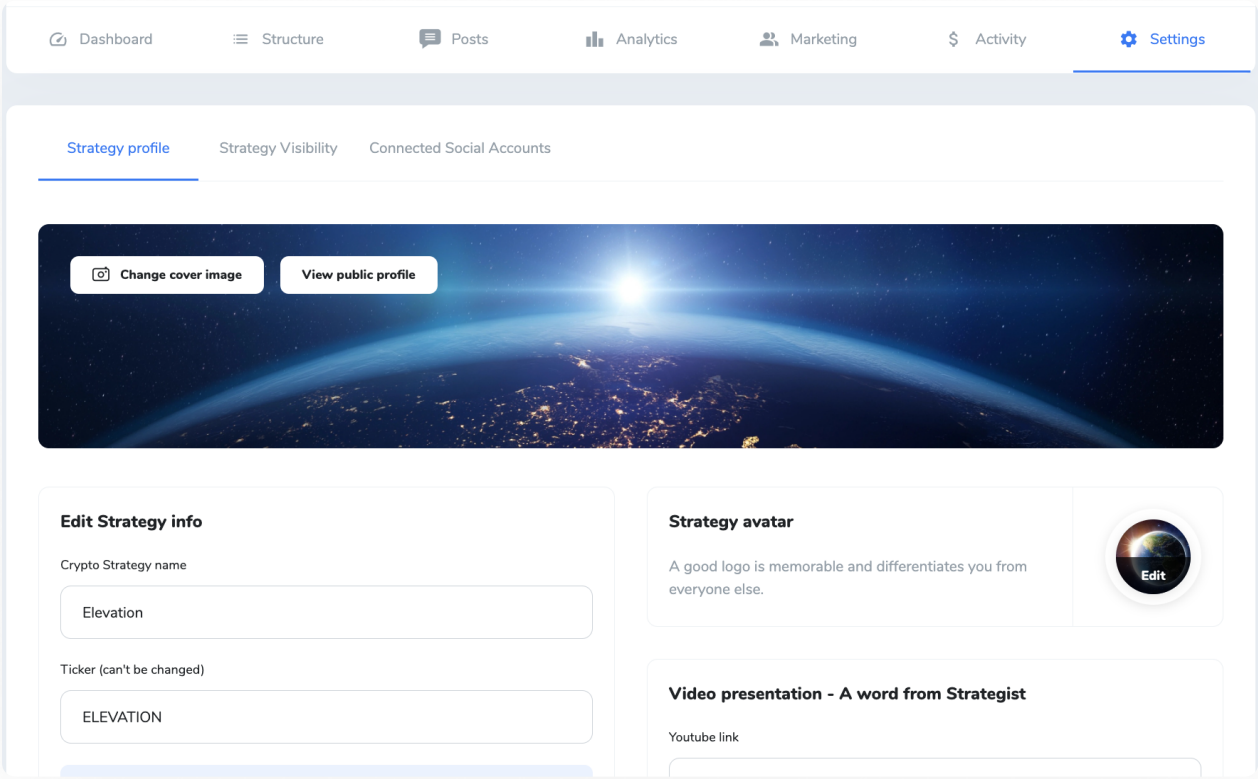
STRATEGY AVATAR, COVER IMAGE, PROFILE IMAGE, ETC.

***Note**: when applying this setting please* follow Communication mandatory guidelines.

To maximize your reach on the ICONOMI platform, you must build your Strategy profile and user profile and use all of the available features.

1. Strategy profile (Strategy “Settings” tab > “Strategy profile” tab):

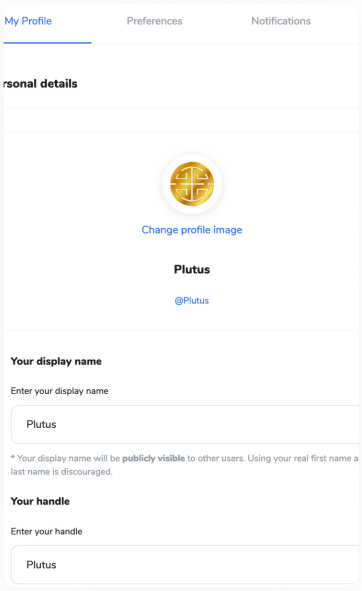
- Upload a cover image/banner
- Upload Strategy avatar
- Set Strategy description
- Upload a short video with a “word from the strategist”
  - This can include any information about your approach to the market
- Connect your Strategist Twitter account
  - Once connected, you can automatically tweet through the ICONOMI platform with a referral link.
  - Once connected, you can select to automatically send a tweet once your Strategy outperforms Bitcoin.



2. Strategist/user profile (user settings: User > “My profile” tab > “Personal details” section)

- Set user display name, user handle
  (it will be displayed below your Strategy name)
- Upload user profile image

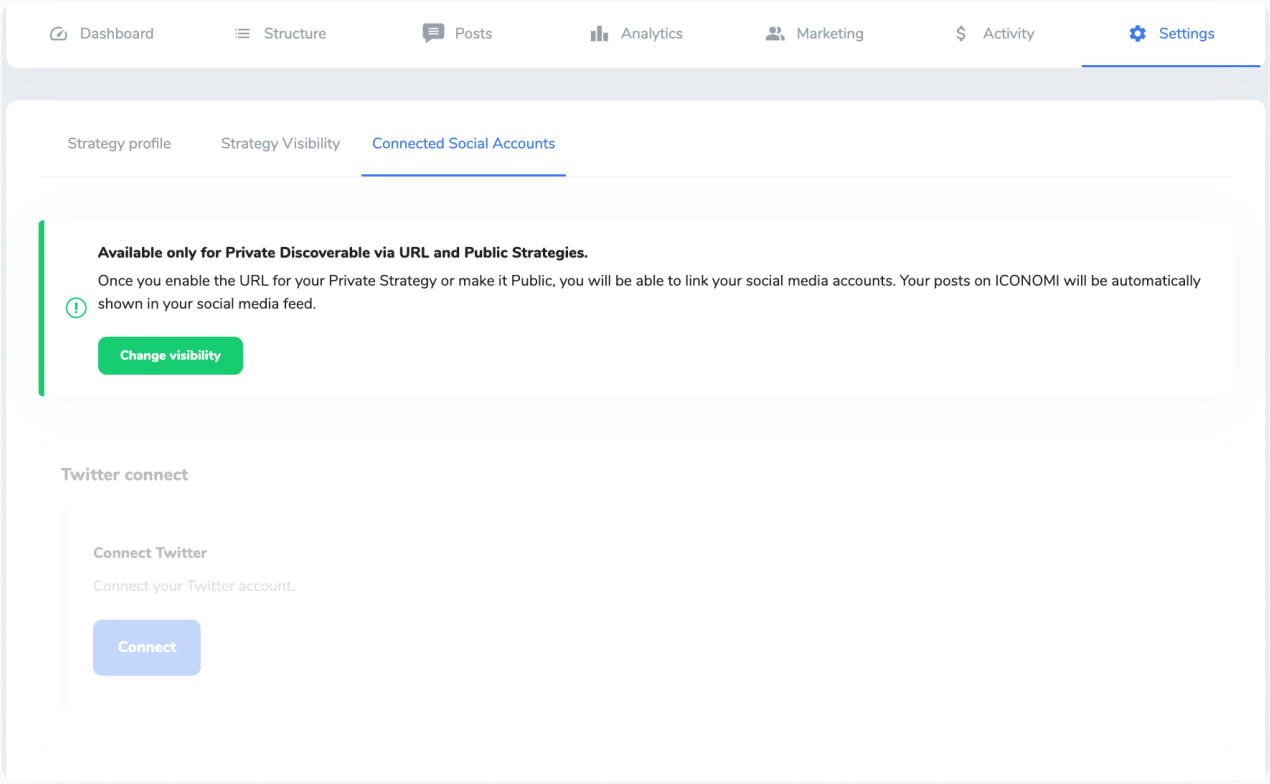
***Note**: Your display name and user handle will be **publicly visible** to other users. Using your real first name and last name is discuraged.*



CONNECT SOCIAL MEDIA - SHARING POSTS AND STRATEGY PERFORMANCE

Connect Social Accounts: *: login to ICONOMI account > My Strategy > "Settings" tab > "Connect Social Accounts" tab*

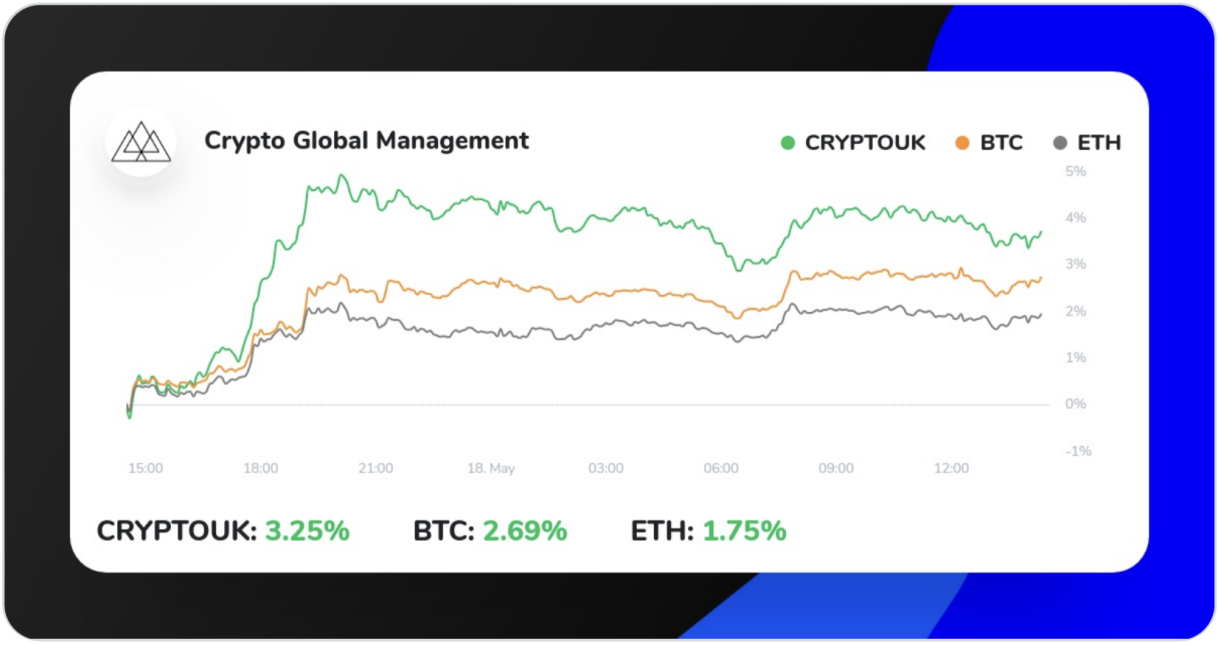
Your posts and performance charts can be shown in your social media feed.



01. Turn on automatic sharing on Twitter and your posts on ICONOMI will be automatically shown in your social media feed.

02. Manually generate comparison charts and share them on your favourite social media (you can make use of ICONOMI's Twitter as well)

#cryptocurrency #crypto #ethereum #defi

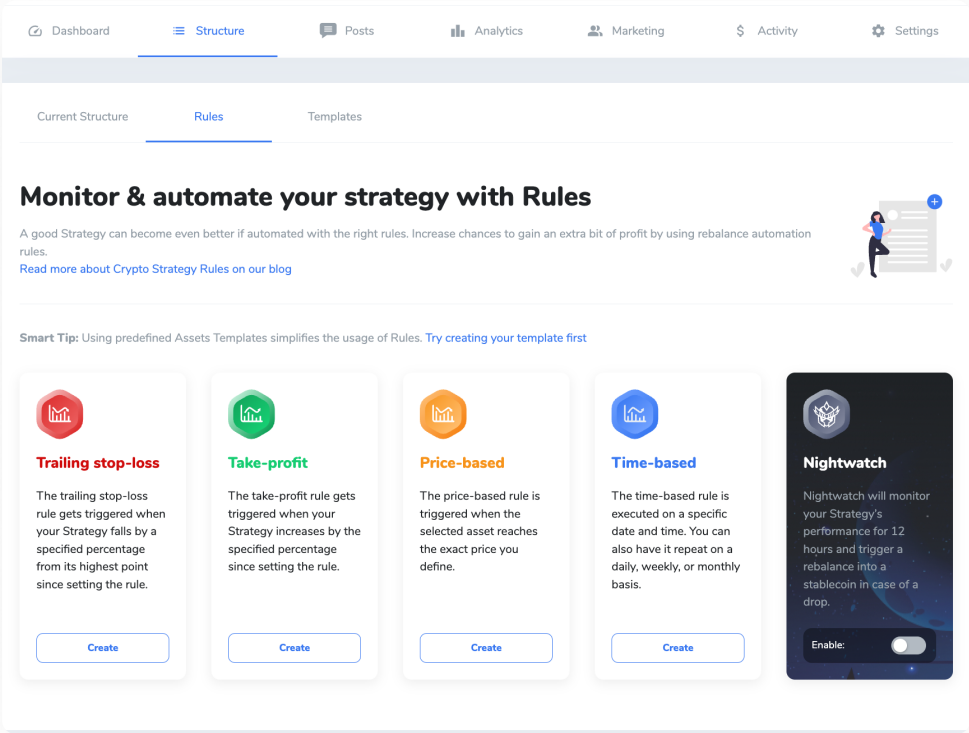


Rebalancing - Portfolio rules (automatic rebalancing/adjusting/changing the Crypto Strategy structure)

Rules: *login to ICONOMI account > My Strategy > go to the "Structure" tab > "Rules" tab*

Build and develop your Strategies for risk management through the use of the ICONOMI automated rebalancing features.

→ Trailing stop-loss → Take-profits → Price-based → Time-based → Nightwatch



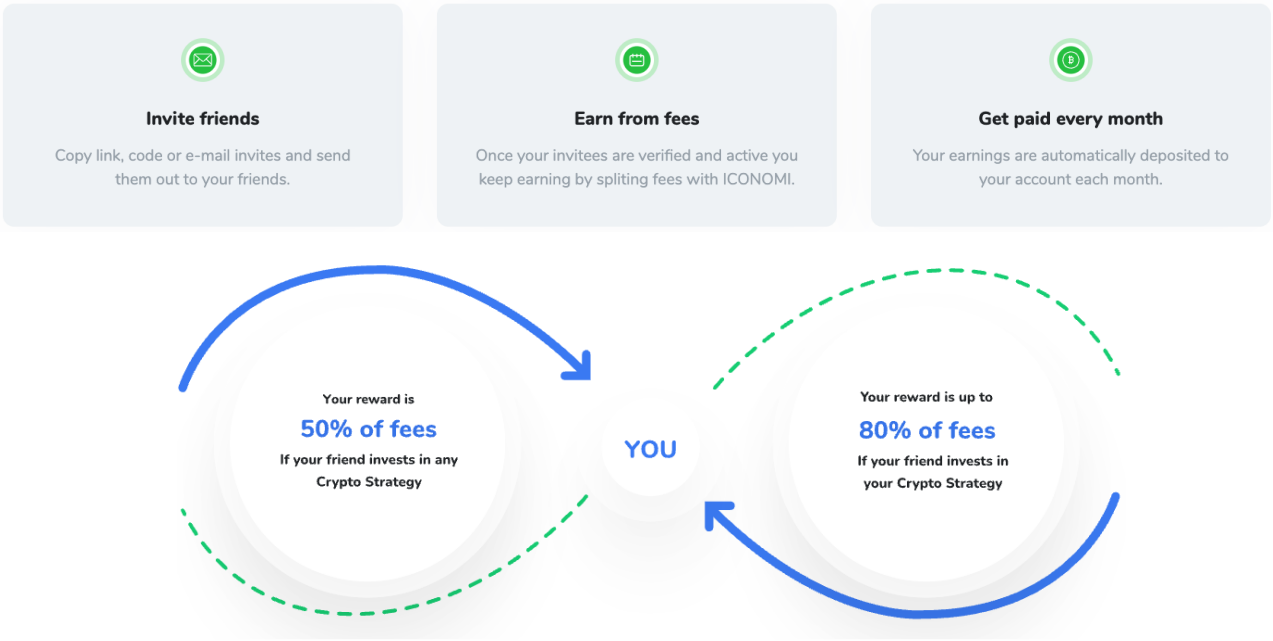
Referral program

***Referral program**: login to ICONOMI account > in the menu go to "More" > and select the "Refer & Earn" tile*

Any time Crypto Strategy fees (Copying fee, Performance fee, ...) are collected they are split between ICONOMI, the Strategist, and the referrer/user according to the Referral program.

Earn something extra every time a new friend invests in any of the Crypto Strategies

Instead of earning once for each referral you bring, we create a long-term connection between you and your friend, where you earn each month from the fees (performance, copy, entry, and sell cost) collected from all your referrals.



Analytics, Activity

MY STRATEGY

> Dashboard tab

- Returns (also BTC comparison)
- Performance (returns for different time periods, Volatility, Max. Drawdown)
- Current structure
- Payouts

> Analytics tab

- Strategy overview (number of rebalances, number of Copiers, Average holding per copier, Returns, ..)
- Performance chart (performance, ACS, BTC comparison, netflow)
- Rebalance history

> Activity tab:

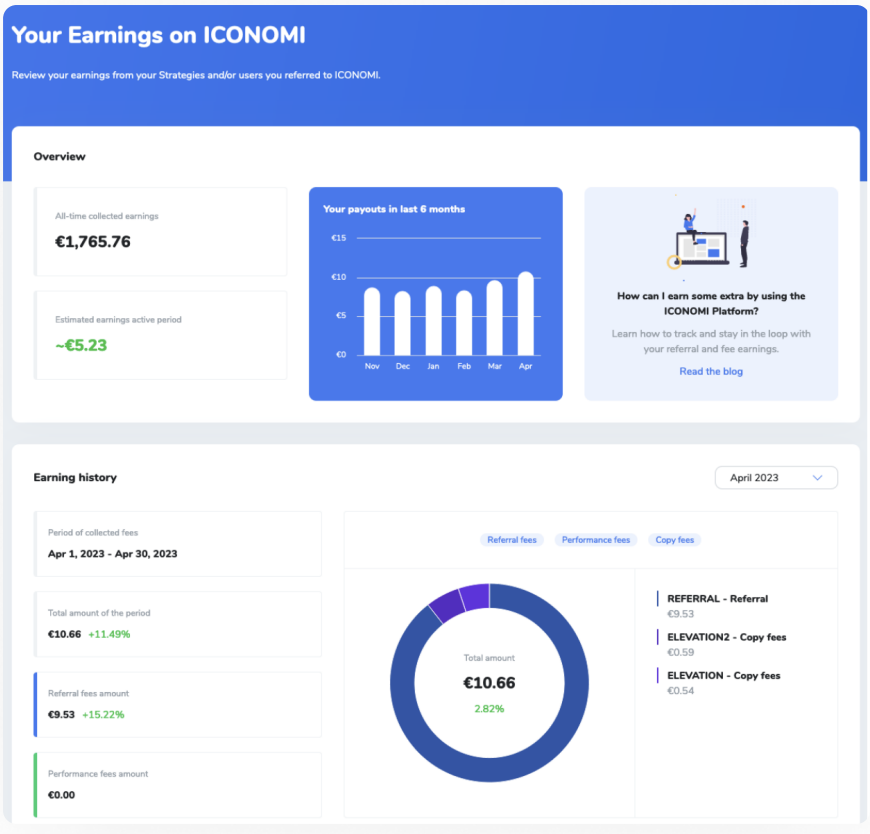
- Added funds transactions, sell transactions, Strategy fees payouts

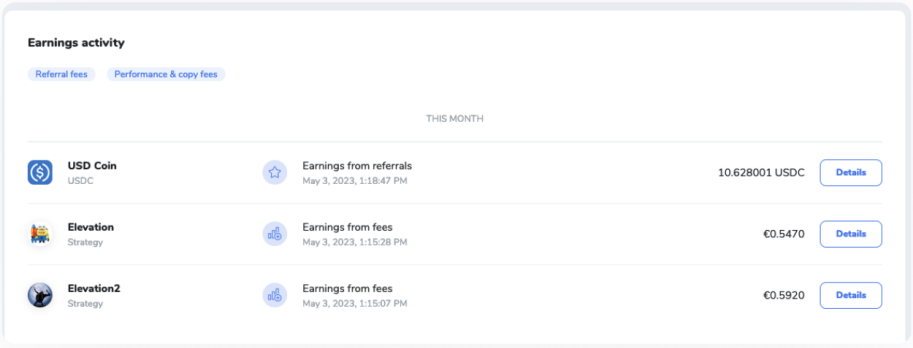
Earnings

***Earnings**: login to ICONOMI account > In the menu go to "More" > and select the "Earnings" tile*

You can check earnings from your Strategy(ies):

- Overview
- Earning history and activity for selected month (collected Copy fees, Performance fees, Referral fees)

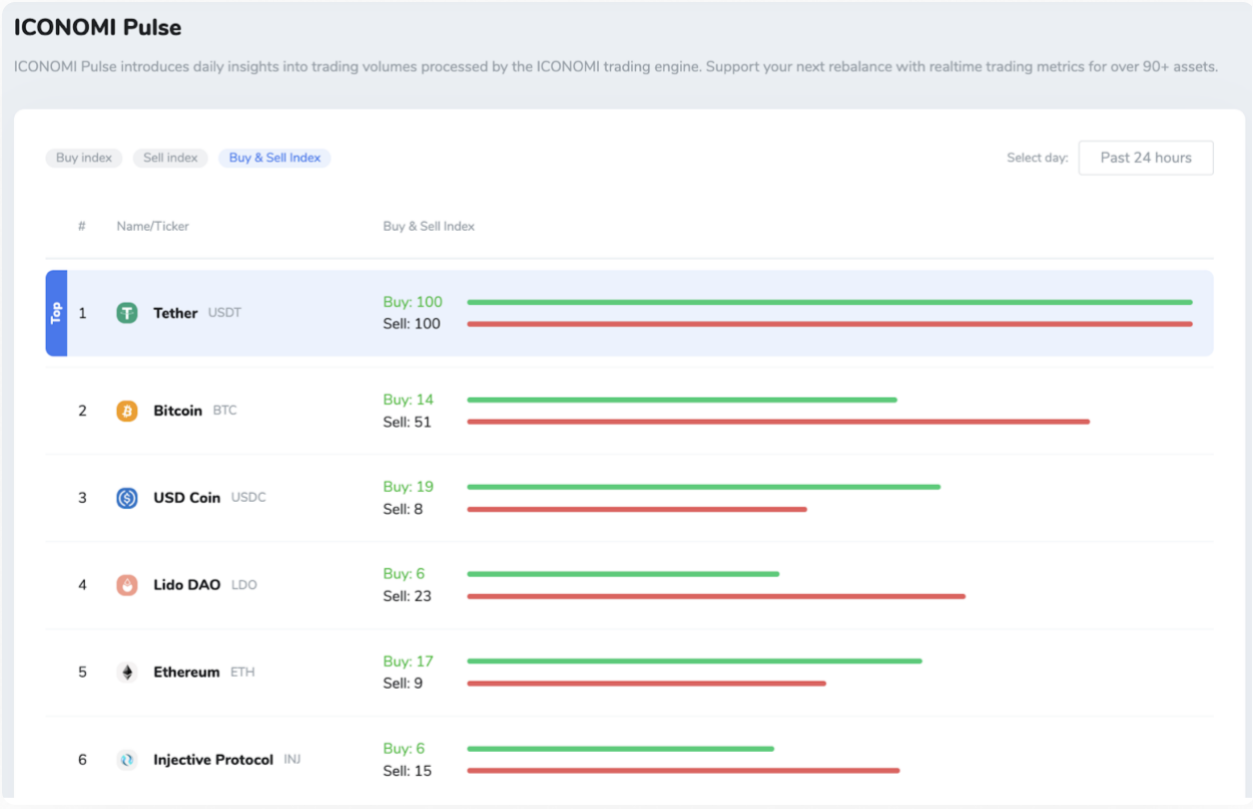




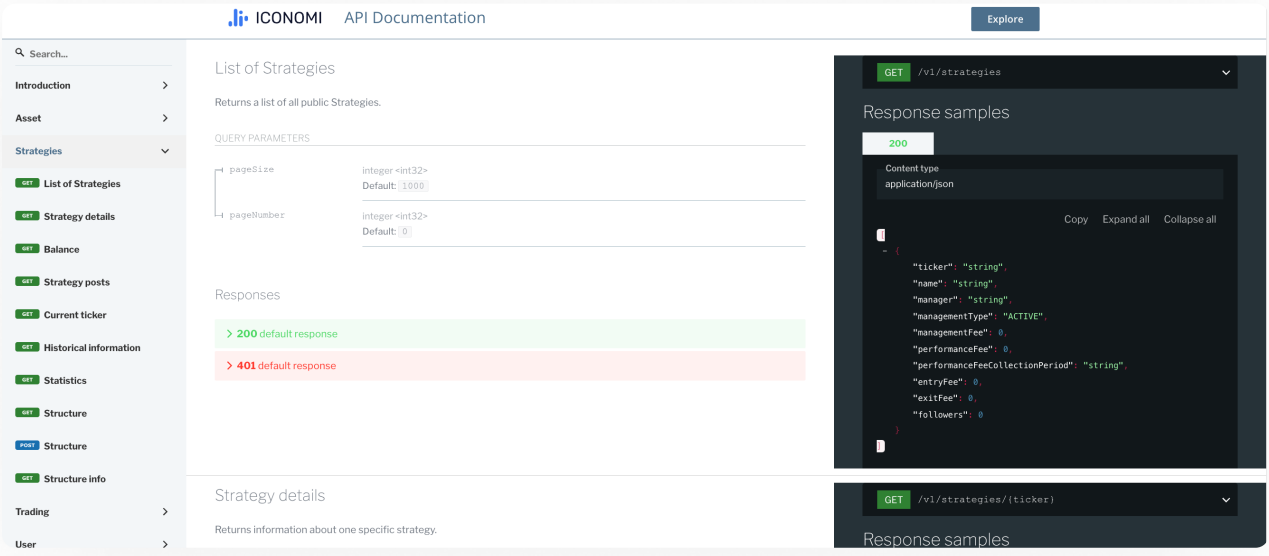
ICONOMI PULSE

ICONOMI Pulse introduces daily insights into trading volumes processed by the ICONOMI trading engine. Support your next rebalance with real time trading metrics for over 90+ assets.

Each Strategist builds their Strategy from the acquired information. Whether it is searching the web and reading crypto news or doing chart analysis, each rebalances is formed according to the information available to the Strategist. ICONOMI Pulse is one of those tools. All trading performed on ICONOMI is translated into nifty charts you can consume with ICONOMI Pulse.



Advanced: **Connect with ICONOMI through API integration**



Pull live data from the ICONOMI platform, including your Strategy performance and underlying portfolio structure through to your website.

You can advertise your Strategy/portfolio on your current business website.
Set up referral/affiliate links once clients visit the ICONOMI platform from your ICONOMI widget.

More information on how to connect with ICONOMI API:
https://iconomi-ag.github.io/iconomi-api/#tag/Strategies

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