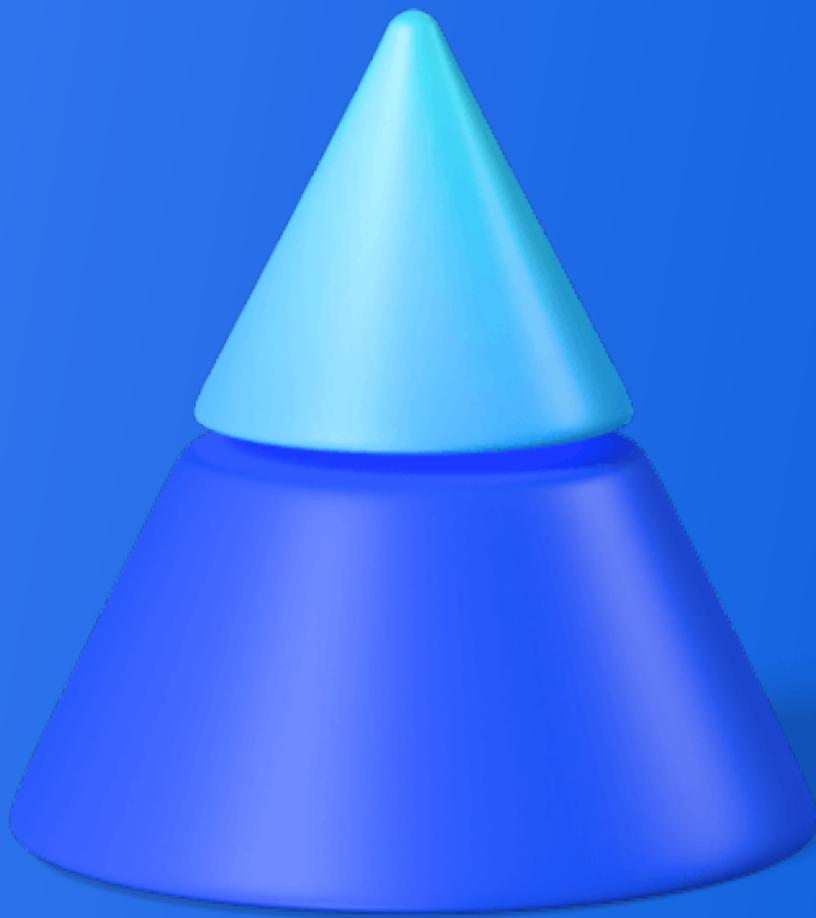




Strategist Information Pack



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](#).

Give your Strategy a cool name

Name of your Strategy

Enter the name of your Strategy

Ticker/Shortname

Create your Strategy ticker

Your Strategy will be available at

<https://www.iconomi.com/asset/>

IMPORTANT!

Be careful when choosing the name and ticker. The ticker cannot be changed later, and it is also a part of the direct URL of your Crypto Strategy. Example: <https://my.iconomi.com/asset/>"ticker" You can only change the Strategy name.

Back

Create My Crypto Strategy



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.

Current StructureRulesTemplates

Current Structure[Select from templates](#) | [Apply previous structure](#) | [Apply current structure](#)

Add one or multiple assets

Structure

<input checked="" type="checkbox"/>		Est. profit	Previous	Current	
<input checked="" type="checkbox"/>	Bitcoin (BTC)	0.10%	52.00%	<input type="text" value="51.83 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	PAX Gold (PAXG)	-0.03%	15.00%	<input type="text" value="14.93 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Ethereum (ETH)	0.58%	8.00%	<input type="text" value="8.01 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Injective Protocol (INJ)	4.24%	8.00%	<input type="text" value="8.3 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Chainlink (LINK)	-0.06%	5.00%	<input type="text" value="4.98 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Arbitrum (ARB)	0.29%	2.00%	<input type="text" value="2 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Binance Coin (BNB)	0.04%	2.00%	<input type="text" value="1.99 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Cosmos (ATOM)	-0.50%	2.00%	<input type="text" value="1.98 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Fetch.ai (FET)	-0.74%	2.00%	<input type="text" value="1.98 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Internet Computer (ICP)	0.87%	2.00%	<input type="text" value="2.01 %"/>	<input type="button" value="x"/>
<input checked="" type="checkbox"/>	Polygon (MATIC)	-0.01%	2.00%	<input type="text" value="1.99 %"/>	<input type="button" value="x"/>

Total: 0.00% left100.00%

Proportionally change selected assets from the existing structure:

-100%0%100%

Save as Template

Save as Draft

Preview

Actions

Added

Not added yet

Changed

No changes yet

Removed

Not removed yet

Bitcoin \$26,938.12

Performance

24H7D

-1.71%

ICONOMI Data

Total asset health status :

III

Supported exchanges :

III

Max. daily volume : **\$3,724,145,089.99**

Returns

Return (24h)
-1.71%

Return (7D)
+1.94%

Return (1M)
-7.92%

Return (1y)
-8.53%

ICONOMI

Strategist Information Pack

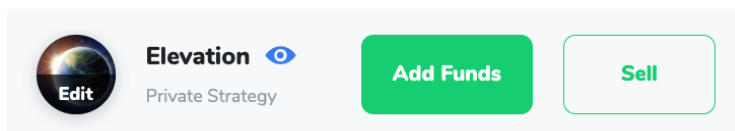
04/16



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](#).

Currently active

Private Strategy

Private Strategies are not listed on ICONOMI. You can still invite your friends and family to copy your strategy directly or share your Strategy via URL.

- ✓ Hidden
- ✓ Not discoverable via search
- ✓ Copy allowed only if invited
- ✓ Earn from fees
- ✓ Optional URL

Discoverable via URL ☐

Public Strategy

Public Strategies are visible on ICONOMI to anyone. These Strategies also have a direct URL and anyone can copy them.

- ✓ Anyone can see it
- ✓ Discoverable via search
- ✓ Copy allowed to anyone
- ✓ Earn from fees
- ✓ Public URL

Strategy not yet eligible to go Public. Check the requirements [here](#).

Verified Strategy

Verified Strategies are marked with a check mark and get additional promotion.

- ✓ Anyone can see it
- ✓ Discoverable via search
- ✓ Copy allowed to anyone
- ✓ Earn from fees
- ✓ Public URL
- ✓ Promoted in "Hot Crypto Strategies"

Is your Strategy eligible to be Verified? Check the requirements [here](#).



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.



[Dashboard](#) [Structure](#) [Posts](#) [Analytics](#) [Marketing](#) [Activity](#) [Settings](#)

[Strategy profile](#) [Strategy Visibility](#) [Connected Social Accounts](#)

 Change cover image

View public profile

Edit Strategy info

Crypto Strategy name


Elevation

Ticker (can't be changed)

ELEVATION

Strategy avatar

A good logo is memorable and differentiates you from everyone else.

 Edit

Video presentation - A word from Strategist

Youtube link


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 discouraged.

[My Profile](#) [Preferences](#) [Notifications](#)

Personal details

 Change profile image

Plutus
@Plutus

Your display name

Enter your display name

Plutus

* Your display name will be publicly visible to other users. Using your real first name and last name is discouraged.

Your handle

Enter your handle

Plutus



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.

The screenshot shows the 'Connected Social Accounts' tab within the 'Settings' section of the ICONOMI interface. The top navigation bar includes 'Dashboard', 'Structure', 'Posts', 'Analytics', 'Marketing', 'Activity', and 'Settings'. The sub-navigation bar shows 'Strategy profile', 'Strategy Visibility', and 'Connected Social Accounts'. A green vertical bar on the left highlights a message: 'Available only for Private Discoverable via URL and Public Strategies. Once you enable the URL for your Private Strategy or make it Public, you will be able to link your social media accounts. Your posts on ICONOMI will be automatically shown in your social media feed.' Below this message is a 'Change visibility' button. The main content area is titled 'Twitter connect' and contains a 'Connect Twitter' section with the text 'Connect your Twitter account.' and a 'Connect' button.

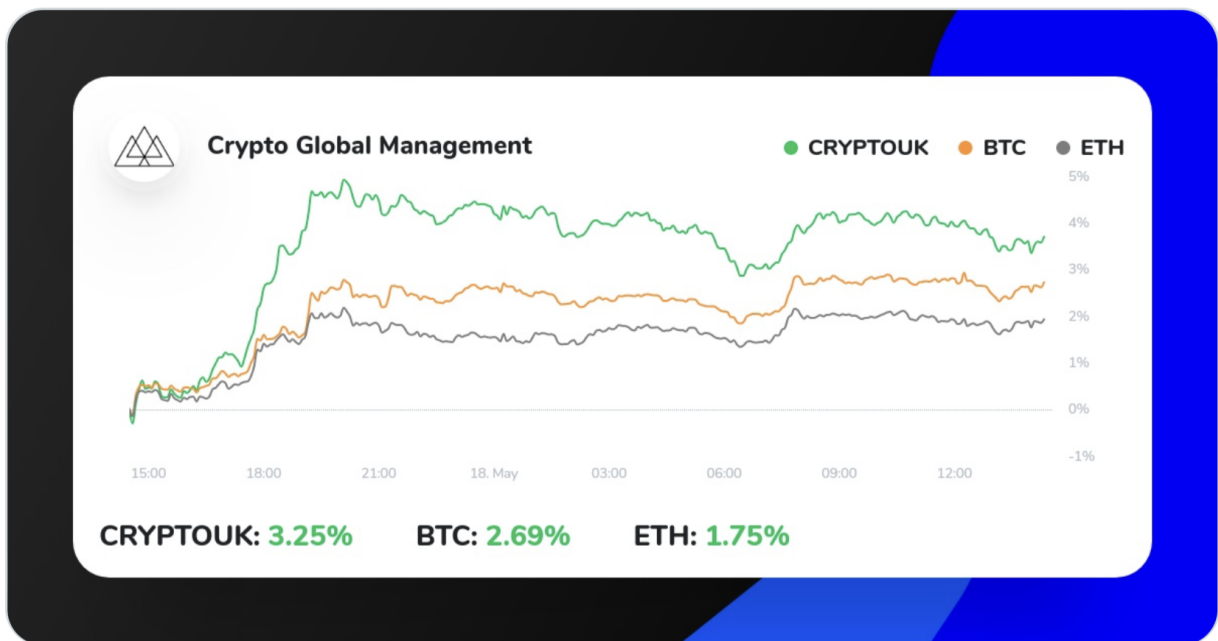


01. Turn on automatic sharing on Twitter and your posts on ICONOMI will be automatically shown in your social media feed.



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

Dashboard Structure Posts Analytics Marketing Activity Settings

Current Structure Rules Templates

Monitor & automate your strategy with Rules

A good Strategy can become even better if automated with the right rules. Increase chances to gain an extra bit of profit by using rebalance automation rules.
[Read more about Crypto Strategy Rules on our blog](#)

Smart Tip: Using predefined Assets Templates simplifies the usage of Rules. [Try creating your template first](#)

Trailing stop-loss

The trailing stop-loss rule gets triggered when your Strategy falls by a specified percentage from its highest point since setting the rule.

Create

Take-profit

The take-profit rule gets triggered when your Strategy increases by the specified percentage since setting the rule.

Create

Price-based

The price-based rule is triggered when the selected asset reaches the exact price you define.

Create

Time-based

The time-based rule is executed on a specific date and time. You can also have it repeat on a daily, weekly, or monthly basis.

Create

Nightwatch

Nightwatch will monitor your Strategy's performance for 12 hours and trigger a rebalance into a stablecoin in case of a drop.

Enable: ☐

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.



Invite friends

Copy link, code or e-mail invites and send them out to your friends.



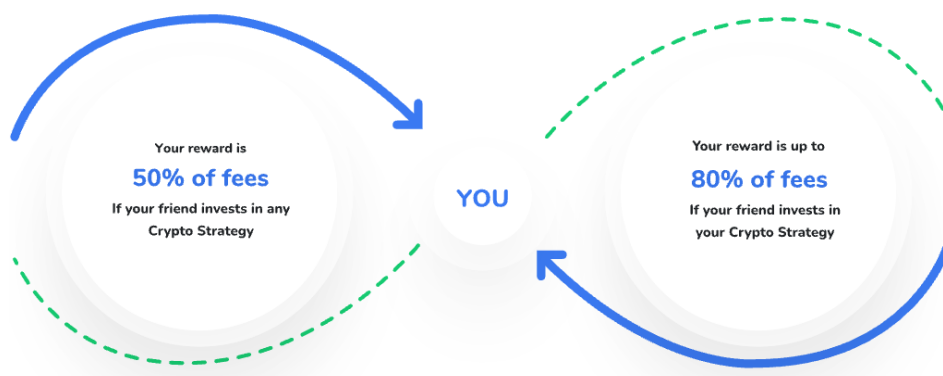
Earn from fees

Once your invitees are verified and active you keep earning by splitting fees with ICONOMI.

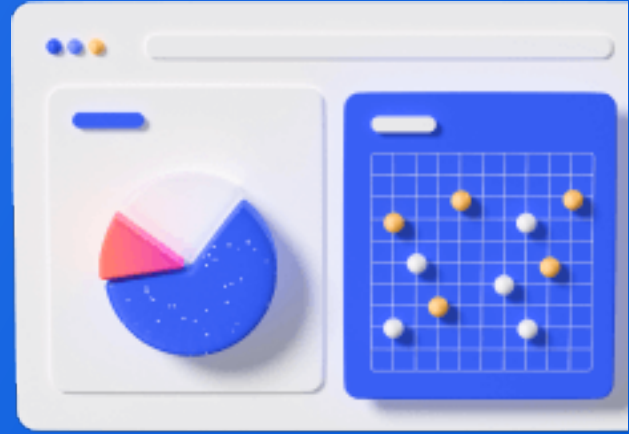


Get paid every month

Your earnings are automatically deposited to your account each month.



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

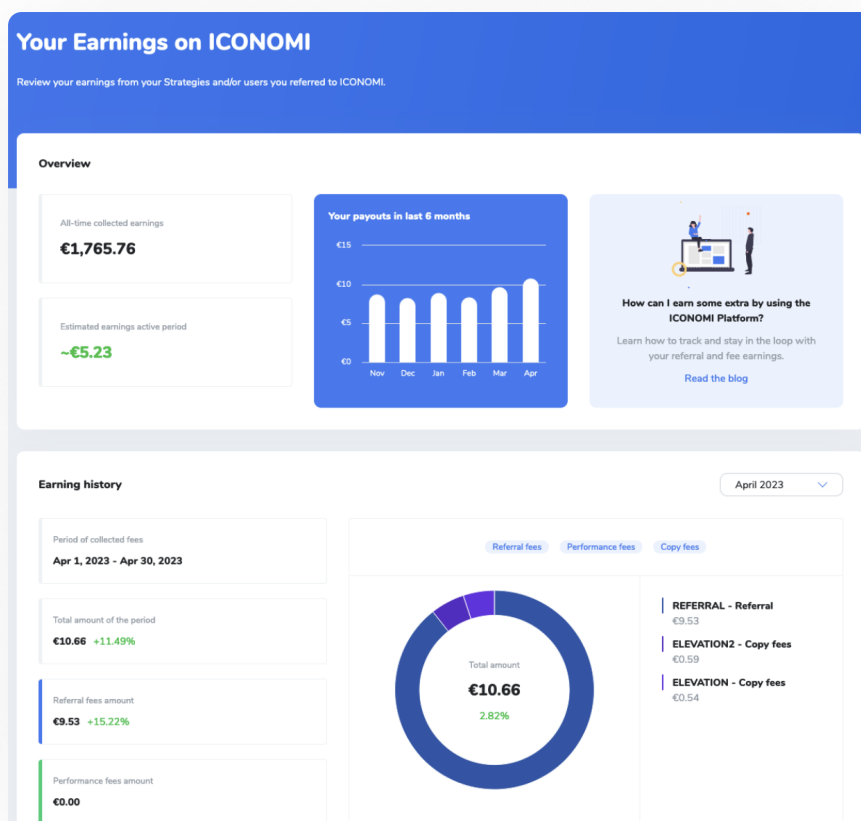
Earnings



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](#))




Earnings activity

Referral fees


Performance & copy fees

THIS MONTH



USD Coin

USDC




Earnings from referrals

May 3, 2023, 1:18:47 PM


10.628001 USDC

Details



Elevation

Strategy




Earnings from fees

May 3, 2023, 1:15:28 PM


€0.5470

Details



Elevation2

Strategy



Earnings from fees

May 3, 2023, 1:15:07 PM

€0.5920

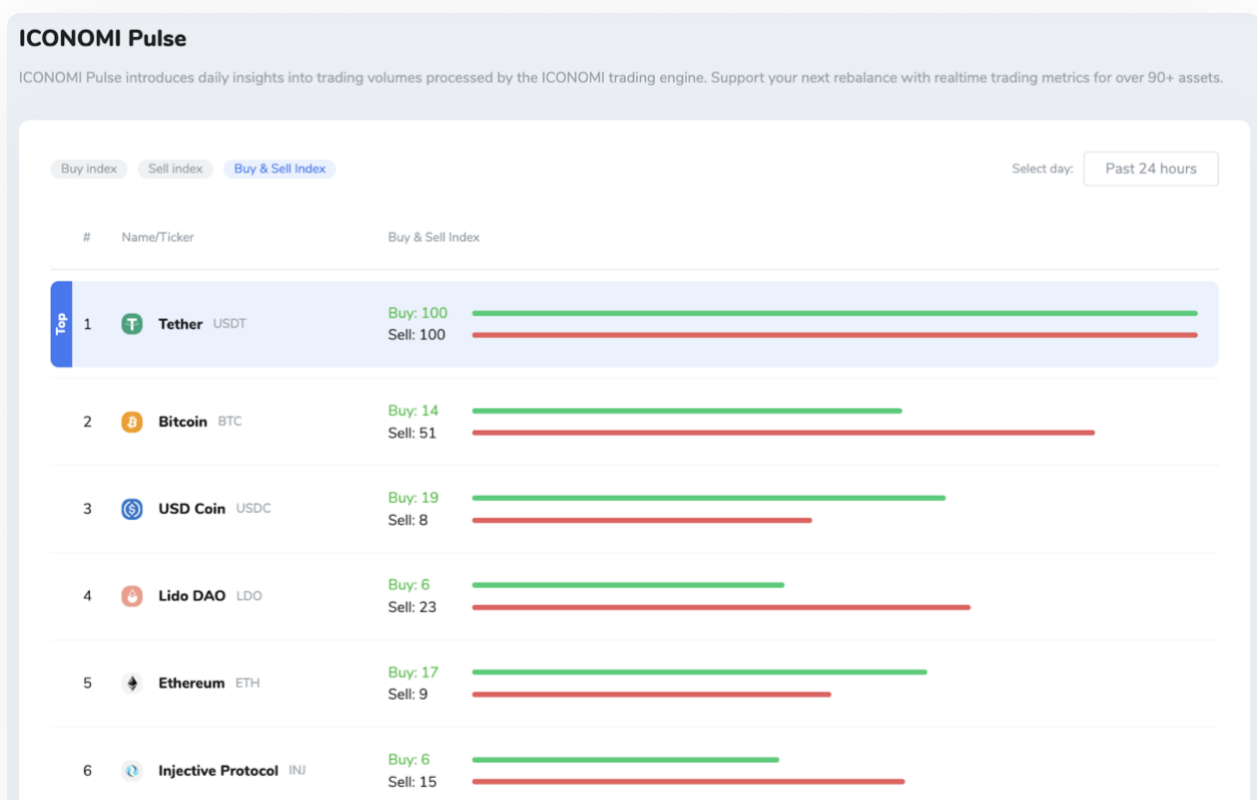
Details



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



ICONOMI API Documentation

Search...

Introduction >

Asset >

Strategies >

GET List of Strategies

GET Strategy details

GET Balance

GET Strategy posts

GET Current ticker

GET Historical information

GET Statistics

GET Structure

POST Structure

GET Structure info

Trading >

User >

List of Strategies

Returns a list of all public Strategies.

QUERY PARAMETERS

pageSize	integer <int32> Default: 1000
pageNumber	integer <int32> Default: 0

Responses

- > 200 default response
- > 401 default response

Strategy details

Returns information about one specific strategy.

GET /v1/strategies

Response samples

200

Content type: application/json

```
{
  "ticker": "string",
  "name": "string",
  "manager": "string",
  "managementType": "ACTIVE",
  "performanceFee": 0,
  "performanceFeeCollectionPeriod": "string",
  "entryFee": 0,
  "exitFee": 0,
  "followers": 0
}
```

GET /v1/strategies/{ticker}

Response samples

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>

