

Trading Ecosystem Presentation

Market Analysis, Decision, Execution and Risk Management Ecosystem

Control Center available in 12 languages
Managed VPS Edition (Windows Server 2025)

version 7.5.0 of June 6, 2026





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Executive Summary & Vision

Professional Trading Workflow



Executive Summary & Vision



SB-ITM is a structured multi-bot trading ecosystem designed for disciplined market analysis, trade execution, risk management, monitoring and operational continuity on Interactive Brokers.

The ecosystem combines modular automation, configurable workflows and dedicated support services to deliver a controlled and scalable trading infrastructure while preserving human supervision and operational control.

Designed as a professional trading workflow ecosystem rather than a standalone trading bot.

Modular Architecture

Independent specialized bots with clearly separated responsibilities.

Risk-First Design

Integrated take-profit, stop-loss and multi-level trailing stop protection.

Operational Flexibility

Semi-automated and fully automated workflow modes.

Monitoring & Resilience

Dedicated monitoring, reporting and recovery services.

Why a Multi-Bot Architecture?

Professional Trading Workflow



Why a Multi-Bot Architecture?



SB-ITM was intentionally designed as a modular multi-bot ecosystem rather than a single monolithic application.

Each bot is dedicated to a specific operational responsibility, improving scalability, maintainability, resilience and operational flexibility while simplifying monitoring, testing and future expansion.

Designed for structured operational continuity rather than isolated automation scripts.

Separation of Responsibilities

Each bot performs a dedicated and isolated operational role.

Easier Maintenance

Independent components simplify updates, testing and troubleshooting.

Operational Resilience

Failures can be isolated without impacting the entire ecosystem.

Scalable Architecture

New services and workflow layers can be integrated progressively.

Control Center

Professional Trading Workflow



Control Center Overview



The SB-ITM Control Center centralizes daily operations, configuration, access to generated files, documentation and support functions within a single user-facing interface.

It reduces manual file handling, standardizes operational workflows and simplifies the use of the ecosystem across managed VPS environments.

The Control Center is the main operational entry point for SB-ITM users.

Centralized Operations

Launch and supervise the main bots from a structured control layer.

Configuration Access

Review and update operational parameters without manually editing configuration files.

Six-Language Interface

User-facing interface available in English, French, German, Dutch, Spanish, Italian, ...

Documentation & Support

Direct access to guides, disclaimers, system information and support functions.

Control Center – Bot Launching



Each bot remains modular and independent, while the Control Center provides a centralized operational layer for launching individual bots and structured workflow chains.

This approach preserves the technical separation between components while simplifying daily operation.

The Control Center does not replace the bots; it provides a controlled and standardized access layer.

Bot-by-Bot Launch

Run individual components for manual operation, testing, validation or troubleshooting.

Workflow Chain Launch

Execute structured sequences such as the Morning Decision Chain.

Operational Guidance

Display the role and operational purpose of each available bot.

Reduced Manual Errors

Reduce incorrect launches and improve operational consistency across environments.

Control Center – Parameters



The Control Center exposes the main operational parameters required to configure and operate the SB-ITM ecosystem.

Mandatory and sensitive values remain subject to validation before execution-critical workflows can be used.

All operational parameters must be reviewed and validated before PAPER or LIVE execution.

Environment Settings

Select the PAPER / LIVE environment and configure the corresponding IBKR account.

Risk Bot Settings

Configure Take Profit, Stop Loss and multi-level trailing-stop parameters.

Bridge Bot Settings

Configure candidate-selection thresholds, symbol limits and trading-day parameters.

Entry Bot Settings

Review the execution schedule, cutoff time, timezone and selected symbols.

Control Center – Files, Logs & Reports



Operational transparency is a core part of SB-ITM. Logs and reports provide the evidence needed to verify each daily workflow step.

Users can review execution traces, reports and diagnostic information without searching manually through folders.

Every critical workflow can be verified through its logs and generated outputs.

Bot Logs

Review INFO, WARNING and ERROR messages by bot and by date.

Morning Scan Files

Access the ranked candidates, scoring results and detailed scan outputs.

Decision Outputs & AI Reports

Review portfolio-aware decisions and the optional AI-generated report.

Snapshots & Support Files

Access portfolio snapshots and generate the technical Support ZIP package.

Morning Decision Chain

The Morning Decision Chain consolidates the pre-market analysis sequence into a single structured workflow.

It is designed to run the ecosystem in the correct order, generate the required evidence and prepare the next operational steps.

The Morning Decision Chain is the core pre-market analysis workflow of the ecosystem.

1. Historical Data Warm-up

Prepare historical market data before the analysis begins.

2. Regime Bot

Detect the active US market regime and select the corresponding scan profile.

3. Scan Bot & Decision Layer

Rank market candidates and apply portfolio, allocation and sector-exposure constraints.

4. Bridge Bot

Transfer validated candidates and trading parameters to the Entry Bot.

Documentation Center



The SB-ITM Documentation Center provides the official reference material for deployment, operation, support and safe use of the ecosystem.

The PowerPoint presentation can serve as a public entry document, while the detailed guides remain available as dedicated operational references.

The Documentation Center remains the official source of truth for SB-ITM operational procedures.

Deployment Guide

Infrastructure preparation, installation and deployment guidance.

VPS First-Start Guide

Initial configuration, startup and validation procedures after delivery.

Automation Guide

Scheduled Tasks, automated workflows and daily operational timing.

Quick Guides

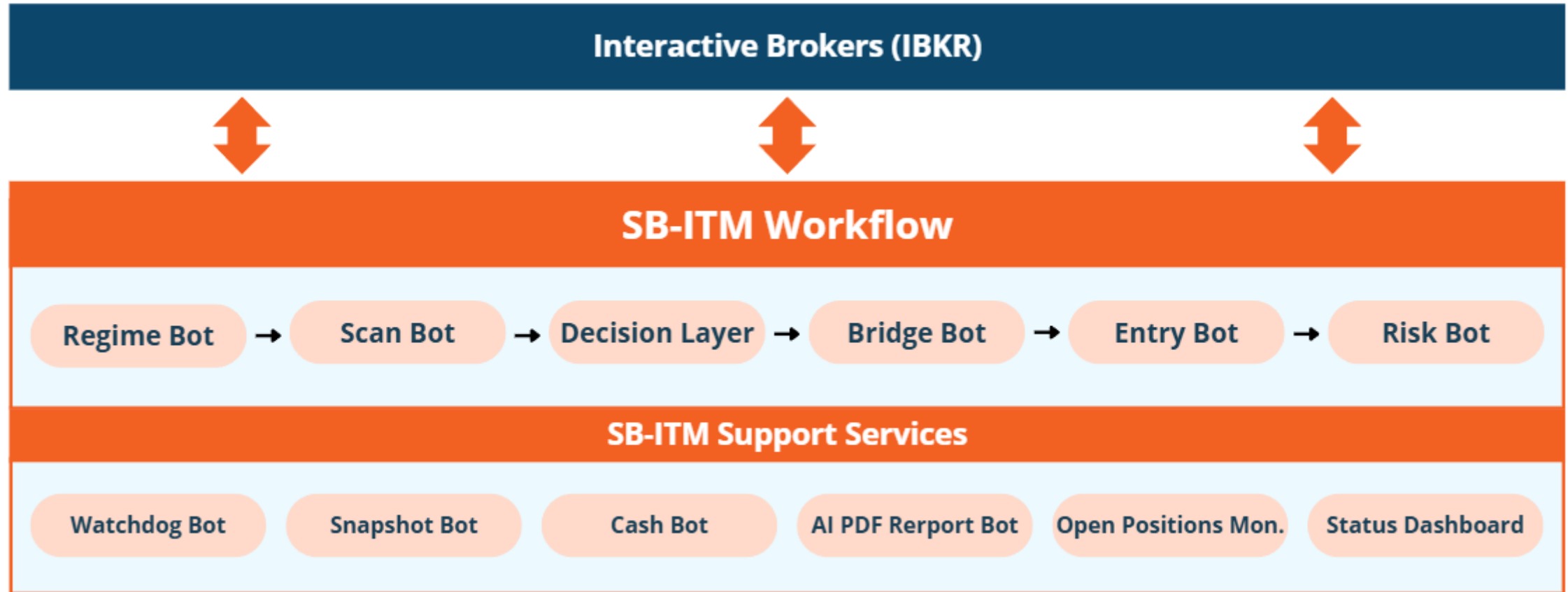
Targeted procedures for common configuration and operational actions.

Global Ecosystem Workflow

Professional Trading Workflow



Global Ecosystem Workflow



Structured multi-layer ecosystem combining data preparation, market analysis, portfolio-aware decision-making, execution, risk management, monitoring and operational continuity.

Daily Operational Timeline



9 PM 10 PM 11 PM 12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM



The Morning Decision Chain Starts

10:00 PM

- Historical data is prepared before market analysis
- The active US market regime is detected.
- The Scan Bot identifies and ranks qualified candidates.
- The Decision Layer applies portfolio constraints before the Bridge Bot updates the Entry Bot.

Daily Operational Timeline



9 PM 10 PM 11 PM 12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM



The System Reboots

08:00 AM

- The VPS restarts automatically
- Scheduled services are reloaded
- Trading environment is reset before 9:30 AM

Automated Environment Recovery

New York Time (ET)

Daily Operational Timeline

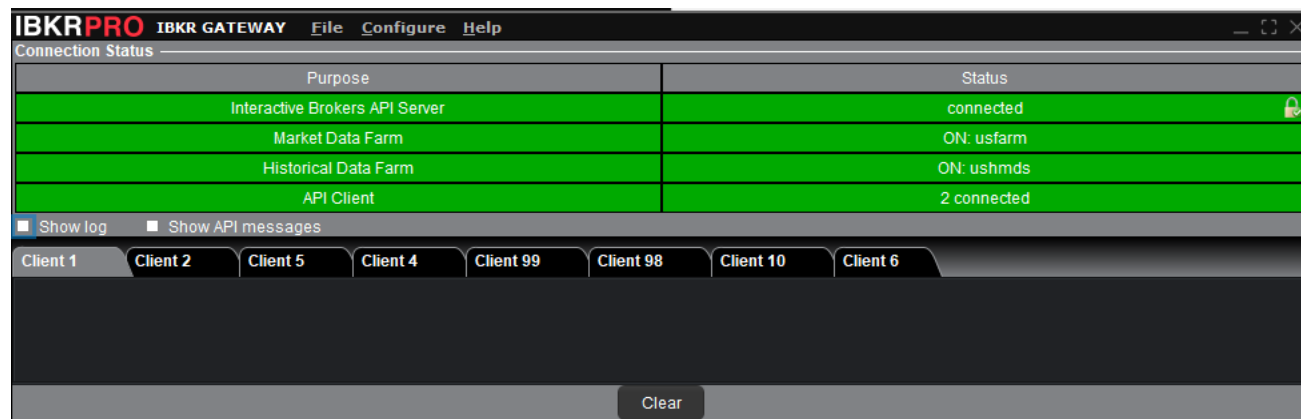
9 PM 10 PM 11 PM 12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM



The Watchdog Bot Starts

08:30 AM

- IB Gateway and Risk Bot are started
- The trading environment is brought online
- Open positions are detected and monitored
- The ecosystem is ready for the US session



Daily Operational Timeline



9 PM 10 PM 11 PM 12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM



The Entry Bot and Open Position Monitor Bot Start

09:00 AM

- The Entry Bot waits until the US Market opens at 09:30 AM
- The Open Position Monitor Bot opens the live monitoring dashboard in the default web browser
- Current open positions and market exposure are displayed
- The execution environment is ready for the market open

Daily Operational Timeline



9 PM 10 PM 11 PM 12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM



Positions Are Executed and Secured

09:30 AM

- The Entry Bot submits the validated orders
- The Risk Bot detects the new positions
- Take Profit and Stop Loss are applied
- New positions are now monitored

```
2026-05-21 15:30:09 INFO New position detected: NU [LONG 74.0 @ 12.64] state=NEW
2026-05-21 15:30:10 INFO NU: TP placed @ 14.54 (id=871) SL placed @ 10.74 (id=872) OCA=OCA_NU_1779370209
2026-05-21 18:15:18 INFO NU trigger L1 reached (last=13.02 trigger=13.02). Switching to trailing.
2026-05-21 18:15:18 INFO NU: Cancelling TP order 871...
2026-05-21 18:15:18 ERROR IBKR error 202 (reqId=872): Order Canceled - reason:
2026-05-21 18:15:18 ERROR IBKR error 202 (reqId=871): Order Canceled - reason:
2026-05-21 18:15:18 INFO NU: TP order 871 cancelled.
2026-05-21 18:15:18 INFO NU: Cancelling SL order 872...
2026-05-21 18:15:18 INFO NU: SL order 872 already gone.
2026-05-21 18:15:19 INFO NU: Trailing Stop L1 placed (1.3%) id=874
2026-05-21 19:16:53 INFO NU: Upgrading trailing stop to L2 (trigger=+4.0%, trail=1.5%)
2026-05-21 19:16:53 ERROR IBKR error 202 (reqId=874): Order Canceled - reason:
2026-05-21 19:16:53 INFO NU: Old trailing stop 874 cancelled.
2026-05-21 19:16:54 INFO NU: Trailing Stop L2 placed (1.5%) id=875
2026-05-21 19:47:06 INFO NU: Upgrading trailing stop to L3 (trigger=+5.0%, trail=1.7%)
2026-05-21 19:47:06 ERROR IBKR error 202 (reqId=875): Order Canceled - reason:
2026-05-21 19:47:06 INFO NU: Old trailing stop 875 cancelled.
2026-05-21 19:47:07 INFO NU: Trailing Stop L3 placed (1.7%) id=876
```

Live Trading Session Begins

New York Time (ET)

Daily Operational Timeline



9 PM 10 PM 11 PM 12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM



The Market Session Ends

04:00 PM

- Open positions remain protected
- Risk management supervision continues
- Monitoring services remain active
- Portfolio visibility remains available



Post-Market Monitoring

New York Time (ET)

Infrastructure & Deployment



SB-ITM is designed as a modular and portable trading ecosystem that can be deployed across different infrastructure configurations according to operational requirements, scalability objectives, and workflow preferences.

VPS = Virtual Private Server

Designed to support both simplified standalone environments and scalable multi-environment infrastructures.

Single VPS Deployment

All operational components run within a centralized environment, providing a simplified setup suitable for standard trading operations.

Multi VPS Deployment

Operational workloads can be distributed across dedicated environments to improve isolation, resilience, testing capabilities and operational continuity.



Scalability

Expandable architecture



Operational Continuity

Monitoring & Recovery



Flexible Deployment

Adaptable infrastructure

Operational Environments & Automation Levels

Professional Trading Workflow



Operational Environments & Automation Levels



SB-ITM supports PAPER and LIVE operational modes, allowing users to adapt the level of automation and execution risk according to workflow maturity and validation status.

Semi-Automated Workflow

Human-In-The-Loop

- Scan Bot generates market candidates
- Candidate transfer and Entry Bot parameters can be reviewed manually before execution.
- Manual validation is performed before trade execution
- Parameters can be adjusted before market open
- Higher operational control is maintained

Fully Automated Workflow

End-To-End Automation

- Scan Bot generates market candidates
- Bridge Bot automatically routes validated selections
- Entry Bot executes positions automatically
- Risk Bot manages protection and trailing logic
- Minimal operational intervention is required

Designed to support progressive automation adoption while preserving operational flexibility.

The Bots

Professional Trading Workflow



Market regime detection and dynamic workflow adaptation.

Responsibilities

- Market regime evaluation
- Trend and volatility analysis
- BULL, RANGE and DEFENSIVE regime detection
- Workflow mode adjustment
- Market condition monitoring

Key Capabilities

- Configurable regime indicators
- Multi-factor market evaluation
- Dynamic workflow adaptation
- Automated market condition classification
- Centralized regime decision layer

Core Workflow Integration

Regime Bot → Scan Bot → Decision Layer → Bridge Bot → Entry Bot → Risk Bot

Designed to dynamically adapt workflow behavior according to market conditions.

Regime Bot



Operational Evidence

```
2026_05_08_SB-ITM_Regime_Bot.log - Notepad
File Edit Format View Help
2026-05-08 20:30:14 [INFO]
2026-05-08 20:30:14 [INFO] =====
2026-05-08 20:30:14 [INFO] === SB-ITM | Regime Bot started ===
2026-05-08 20:30:14 [INFO] =====
2026-05-08 20:30:14 [INFO]
2026-05-08 20:30:14 [INFO] SB-ITM License Reference : PROD-9999
2026-05-08 20:30:14 [INFO] SB-ITM Version          : 07.00.00
2026-05-08 20:30:14 [INFO] SB-ITM Delivery Date   : 2026-05-09
2026-05-08 20:30:14 [INFO] SB-ITM License Key     : SBITM-9999-9999-9999
2026-05-08 20:30:14 [INFO] Regime bot started
2026-05-08 20:30:14 [INFO] IBKR runtime loaded from config.yaml: host=127.0.0.1, port=4002, regime_client_id=6
2026-05-08 20:30:14 [INFO] Connected to TWS at 127.0.0.1:4002 (clientId=6)
2026-05-08 20:30:14 [INFO] Fetching SPY daily bars from TWS (300 D)
2026-05-08 20:30:15 [INFO] Fetching QQQ daily bars from TWS (300 D)
2026-05-08 20:30:15 [INFO] Fetching VIX daily bars from TWS (300 D)
2026-05-08 20:30:16 [INFO] Fetching RSP daily bars from TWS (300 D)
2026-05-08 20:30:16 [INFO] SPY 737.62 | MA200: 673.43 | dist: +9.53% | above MA
2026-05-08 20:30:16 [INFO] QQQ 711.23 | MA200: 607.31 | above MA
2026-05-08 20:30:16 [INFO] VIX 17.19
2026-05-08 20:30:16 [INFO] SPY ATR14: 7.0400 | ATR%: 0.95%
2026-05-08 20:30:16 [INFO] RSP 204.10 | MA50: 198.09 | breadth: above MA
2026-05-08 20:30:16 [INFO] Bull check | SPY above MA: yes | QQQ above MA: yes | VIX 17.19 <= 20.00: yes | ATR% 0.95% <= 2.00%: yes | RSP above MA breadth: yes | SPY MA distance +9.53% >= 1.50%: yes
2026-05-08 20:30:16 [INFO] Regime: bull | all conditions met
2026-05-08 20:30:16 [INFO] market_mode updated: range -> bull
2026-05-08 20:30:16 [INFO] Disconnected from TWS
2026-05-08 20:30:16 [INFO] Regime bot finished
```

Structured market regime detection supporting adaptive workflow supervision.

Market scanning and structured opportunity detection.

Responsibilities

- Large-cap universe scanning
- Technical market filtering
- Structured candidate detection
- Opportunity scoring and ranking
- Automated scan report generation

Key Capabilities

- Configurable scoring framework
- Technical indicator analysis
- Market structure evaluation
- Multi-factor candidate filtering
- Automated CSV, Log and Excel reporting

Core Workflow Integration

Regime Bot → **Scan Bot** → Decision Layer → Bridge Bot → Entry Bot → Risk Bot

Structured opportunity detection layer supporting disciplined market analysis.

Operational Evidence

```
2026-05-08 21:30:47 [INFO] Scanner started
2026-05-08 21:30:47 [INFO]
2026-05-08 21:30:47 [INFO] =====
2026-05-08 21:30:47 [INFO] === SB-ITM | Scan Bot started ===
2026-05-08 21:30:47 [INFO] =====
2026-05-08 21:30:47 [INFO]
2026-05-08 21:30:47 [INFO] SB-ITM License Reference : PROD-9999
2026-05-08 21:30:47 [INFO] SB-ITM Version          : 07.00.00
2026-05-08 21:30:47 [INFO] SB-ITM Delivery Date   : 2026-05-09
2026-05-08 21:30:47 [INFO] SB-ITM License Key     : SBITM-9999-9999-9999
2026-05-08 21:30:47 [INFO] Active scoring profile: range
2026-05-08 21:30:47 [INFO] Scoring rules loaded from config/scoring_range.yaml
2026-05-08 21:30:47 [INFO] Connected to IBKR at 127.0.0.1:4002 (clientId=3)
2026-05-08 21:30:47 [INFO] Symbols to scan: 967
```

```
2026-05-08 21:43:50 [INFO] Processing: VIST
2026-05-08 21:43:51 [INFO] Disconnected from IBKR
2026-05-08 21:43:51 [INFO] CSV written: output\scan_20260508_1148.csv
2026-05-08 21:43:51 [INFO] XLSX written: output\scan_20260508_1148.xlsx
2026-05-08 21:43:51 [INFO] --- Summary ---
2026-05-08 21:43:51 [INFO] Start:      2026-05-08 21:30:03
2026-05-08 21:43:51 [INFO] End:        2026-05-08 21:43:51
2026-05-08 21:43:51 [INFO] Elapsed:    828s
2026-05-08 21:43:51 [INFO] Scanned:    967
2026-05-08 21:43:51 [INFO] Processed:  967
2026-05-08 21:43:51 [INFO] Candidates: 7
2026-05-08 21:43:51 [INFO] Errors:     0
```

Automated market scanning and structured candidate detection workflows.

Operational Evidence



INVESTMENT & TRADING METHODOLOGY
by Sébastien Bartholomé

SB-ITM Morning Scan
Daily trading opportunities overview

Generated on: 2026-05-08 03:13



Symbol	CompanyName	Sector	Close	Support	Resistance	SupportDistance	ResistanceDistance	Amplitu	Score	CandidateFlag	WeeklyMA	PriceAboveMA2	WeeksAboveM	MA200Slo
APA	APA CORP	Energy	36,24	35,13	45,66	0,0316	0,2599	0,2997	24	TRUE	31,1055	TRUE	9	UP
FSM	FORTUNA MINING CORP	Basic Materials	10,46	9,965	11,2	0,0497	0,0707	0,1239	24	TRUE	5,1616	TRUE	61	UP
SONY	SONY GROUP CORP - SP ADR	Consumer, Cyclical	19,89	19,68	21,885	0,0107	0,1003	0,112	22	TRUE	19,6345	TRUE	61	UP
COKE	COCA-COLA CONSOLIDATED INC	Consumer, Non-cyclical	177,61	177,28	209,36	0,0019	0,1788	0,181	22	TRUE	100,5325	TRUE	61	UP
CGAU	CENTERRA GOLD INC	Basic Materials	17,79	17,51	20,07	0,016	0,1282	0,1462	22	TRUE	7,6302	TRUE	50	UP
VTOL	BRISTOW GROUP INC	Energy	42,55	42,05	46,36	0,0119	0,0895	0,1025	22	FALSE	31,8049	TRUE	48	UP
CQP	CHENIERE ENERGY PARTNERS LP	Energy	63,19	62,095	70,65	0,0176	0,1181	0,1378	22	FALSE	53,6002	TRUE	23	UP
USFD	US FOODS HOLDING CORP	Consumer, Non-cyclical	86,88	80,665	94,2933	0,077	0,0853	0,1689	21	FALSE	56,2259	TRUE	61	UP
ITUB	ITAU UNIBANCO H-SPON PRF ADR	Financial	8,18	7,8	9,11	0,0487	0,1137	0,1679	20	TRUE	5,6457	TRUE	61	UP
PLMR	PALOMAR HOLDINGS INC	Financial	113,57	110,81	122,875	0,0249	0,0819	0,1089	20	FALSE	90,9622	TRUE	61	UP
COR	CENCORA INC	Consumer, Non-cyclical	255,66	244,82	296,1767	0,0443	0,1585	0,2098	20	TRUE	233,5401	TRUE	61	UP
EIX	EDISON INTL	Utilities	68,57	66,3	73,91	0,0342	0,0779	0,1148	19	TRUE	66,7652	TRUE	12	UP
ALLE	ALLEGION PLC	Industrial	136,81	136,015	144,8	0,0058	0,0584	0,0646	19	FALSE	128,9715	TRUE	61	UP
AROC	ARCHROCK INC	Energy	38,1	34,68	40,12	0,0986	0,053	0,1569	19	FALSE	18,7303	TRUE	61	UP
STEP	STEPSTONE GROUP INC-CLASS A	Financial	54,18	54,06	57,79	0,0022	0,0666	0,069	19	FALSE	43,1769	TRUE	61	UP
EOG	EOG RESOURCES INC	Energy	130,89	124,31	151,87	0,0529	0,1603	0,2217	19	FALSE	121,8607	TRUE	11	UP
GPOR	GULFPORT ENERGY CORP	Energy	178,8	178,66	193,105	0,0008	0,08	0,0809	18	FALSE	143,022	TRUE	60	UP
LNG	CHENIERE ENERGY INC	Energy	246,78	246,43	259,24	0,0014	0,0505	0,052	18	FALSE	188,0784	TRUE	61	UP

Configurable scoring framework supporting disciplined opportunity evaluation.

Decision Layer

Portfolio-aware candidate evaluation and selection.

Responsibilities

- Evaluate qualified Scan Bot candidates
- Retrieve the current IBKR portfolio context
- Review existing positions and sector exposure
- Apply portfolio and allocation constraints
- Produce the final candidates decisions

Key Capabilities

- Portfolio-aware candidate selection
- Existing-position conflict detection
- Sector-exposure analysis
- Candidate acceptance and rejection reasons
- Structured decision output generation

Core Workflow Integration

Regime Bot → Scan Bot → **Decision Layer** → Bridge Bot → Entry Bot → Risk Bot

Portfolio-aware decision layer designed to align new trading candidates with the current account context.

Decision Layer

Operational Evidence

```
2026-06-07 06:51:02 INFO LIVE PORTFOLIO CONTEXT
2026-06-07 06:51:02 INFO -----
2026-06-07 06:51:02 INFO ACCOUNT VALUE : 1,168,442.65 USD
2026-06-07 06:51:02 INFO TOTAL CASH VALUE : 706,991.26 USD
2026-06-07 06:51:02 INFO CASH BUFFER : 35,349.56 USD (5.00%)
2026-06-07 06:51:02 INFO CASH USABLE : 671,641.70 USD
2026-06-07 06:51:02 INFO MAX ORDER SIZE : 2,000.00 USD
2026-06-07 06:51:02 INFO OPEN POSITIONS : 4
2026-06-07 06:51:02 INFO
2026-06-07 06:51:02 INFO CURRENT SECTOR EXPOSURE
2026-06-07 06:51:02 INFO -----
2026-06-07 06:51:02 INFO INTERNET : 20.24%
2026-06-07 06:51:02 INFO TELECOMMUNICATIONS : 10.13%
2026-06-07 06:51:02 INFO AEROSPACE/DEFENSE : 10.12%
2026-06-07 06:51:02 INFO
2026-06-07 06:51:02 INFO SCAN INPUT
2026-06-07 06:51:02 INFO -----
2026-06-07 06:51:02 INFO SCAN CSV USED : C:\IBKR\BOT\system_c\output\C_Morning_Scan_20260607_0623.csv
2026-06-07 06:51:02 INFO ROWS LOADED : 1025
2026-06-07 06:51:02 INFO SCORE THRESHOLD : 23
2026-06-07 06:51:02 INFO CANDIDATEFLAG ONLY : True
2026-06-07 06:51:02 INFO MAX SYMBOLS : 4
2026-06-07 06:51:02 INFO MAX PER SECTOR : 2
2026-06-07 06:51:02 INFO SECTOR SOFT CAP : 30.00%
2026-06-07 06:51:02 INFO SECTOR HARD CAP : 45.00%
2026-06-07 06:51:02 INFO
2026-06-07 06:51:02 INFO IBKR SECTOR LOOKUP
2026-06-07 06:51:02 INFO -----
2026-06-07 06:51:02 INFO SYMBOLS REQUESTED : 1
2026-06-07 06:51:02 INFO SECTORS RECEIVED : 1
2026-06-07 06:51:02 INFO
2026-06-07 06:51:02 INFO DECISION LAYER SUMMARY
2026-06-07 06:51:02 INFO -----
2026-06-07 06:51:02 INFO INPUT CANDIDATES BEFORE CAPS : 1
2026-06-07 06:51:02 INFO SELECTED FOR BRIDGE : 1
2026-06-07 06:51:02 INFO REJECTED / CAPPED : 1024
2026-06-07 06:51:02 INFO
2026-06-07 06:51:02 INFO SELECTED SYMBOLS
2026-06-07 06:51:02 INFO SYMBOL | SCORE | SECTOR | SECTOR EXP | MAX ORDER | ENTRY QUALITY | REASON
2026-06-07 06:51:02 INFO ----- | ----- | ----- | ----- | ----- | ----- | -----
2026-06-07 06:51:02 INFO BAP | 28 | BANKS | 0.00% | 2000.00 | VALID | Very close to support / Rebound pattern / Volume confirmed / High volatility
2026-06-07 06:51:02 INFO
2026-06-07 06:51:02 INFO DECISION OUTPUT WRITTEN : C:\IBKR\BOT\system_c\output\decision\C_Decision_Output_20260607_0651.csv
2026-06-07 06:51:02 INFO LATEST DECISION OUTPUT : C:\IBKR\BOT\system_c\output\latest\C_Decision_Output_latest.csv
2026-06-07 06:51:02 INFO ORDERS : No orders sent by Decision Layer
```

Structured portfolio-aware analysis supporting controlled candidate selection before execution.

Workflow orchestration and candidate transfer automation.

Responsibilities

- Validated candidate transfer
- Decision output processing
- Automated workflow routing
- Entry parameter preparation
- Execution workflow synchronization

Key Capabilities

- Configurable score filtering
- Decision Layer output integration
- Automated symbol transfer
- Execution date synchronization
- Semi-automated and fully automated workflow

Core Workflow Integration

Regime Bot → Scan Bot → Decision Layer → **Bridge Bot** → Entry Bot → Risk Bot

Providing optional workflow orchestration between market analysis and execution layers.


```
*2026_05_08_SB-ITM_Bridge_Bot.log - Notepad
File Edit Format View Help
2026-05-08 22:00:01 INFO
2026-05-08 22:00:01 INFO =====
2026-05-08 22:00:01 INFO == SB-ITM | Bridge Bot started ==
2026-05-08 22:00:01 INFO =====
2026-05-08 22:00:01 INFO
2026-05-08 22:00:01 INFO Scan CSV: C:\IBKR\BOT\output\SB-ITM_Morning_Scan_20260508_0300.csv
2026-05-08 22:00:01 INFO Candidates after filtering: ['APA', 'FSM']
2026-05-08 22:00:01 INFO entry_params.json updated:
2026-05-08 22:00:01 INFO     execution_date = 2026-05-08
2026-05-08 22:00:01 INFO     symbols      = ['APA', 'FSM']
```

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Entry Bot

Automated trade execution and position allocation management.

Responsibilities

- Order execution management
- Position sizing calculation
- Capital allocation control
- Trade entry synchronization
- Automated position opening

Key Capabilities

- Market order execution
- Configurable capital allocation
- Multi-position management
- Automated execution scheduling
- Interactive Brokers integration

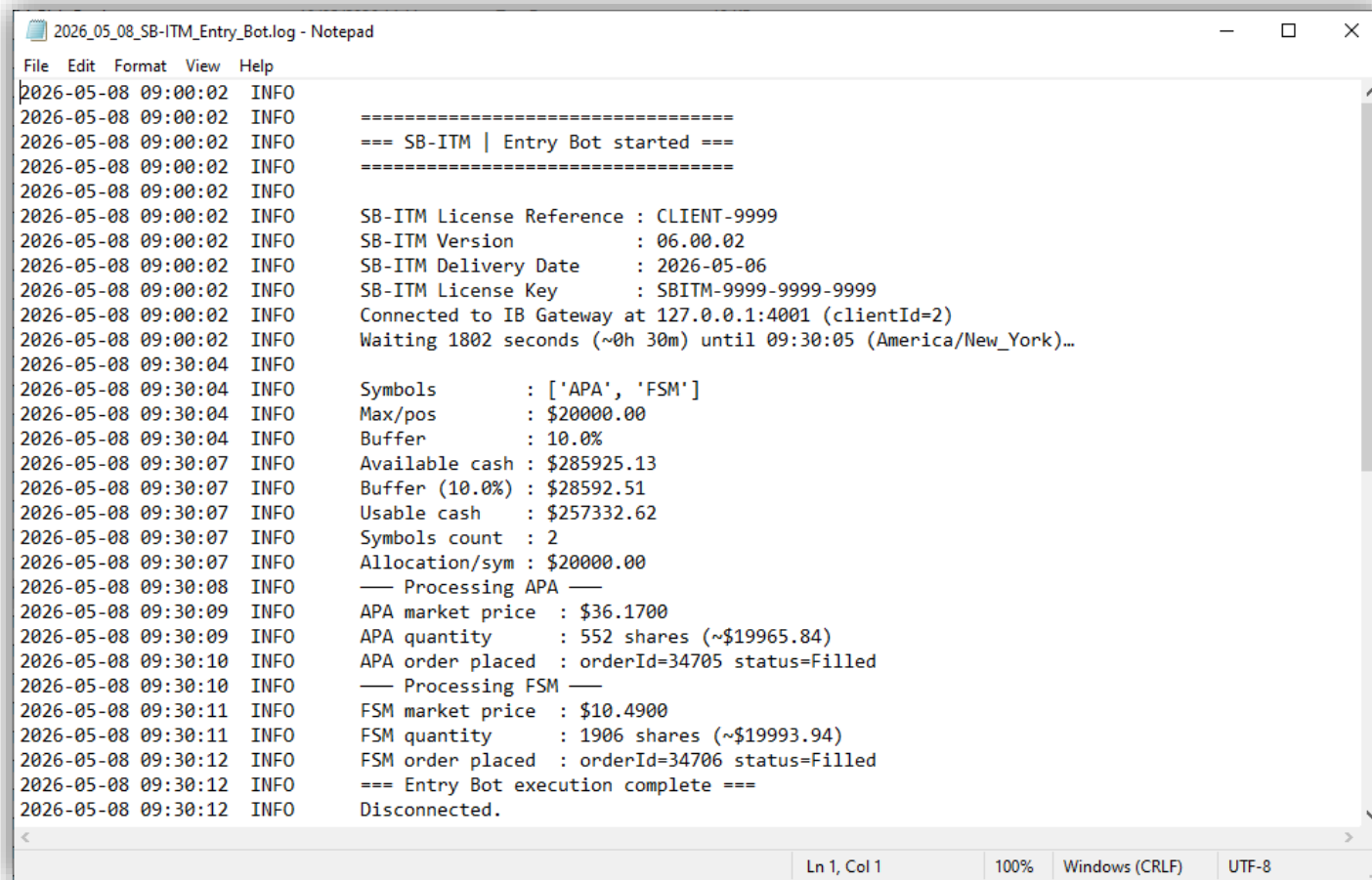
Core Workflow Integration

Regime Bot → Scan Bot → Decision Layer → Bridge Bot → **Entry Bot** → Risk Bot

Designed for structured and controlled trade execution workflows.

Entry Bot

Operational Evidence

A screenshot of a Notepad window titled "2026_05_08_SB-ITM_Entry_Bot.log - Notepad". The window displays a log file with the following content:

```
File Edit Format View Help
2026-05-08 09:00:02 INFO
2026-05-08 09:00:02 INFO =====
2026-05-08 09:00:02 INFO === SB-ITM | Entry Bot started ===
2026-05-08 09:00:02 INFO =====
2026-05-08 09:00:02 INFO SB-ITM License Reference : CLIENT-9999
2026-05-08 09:00:02 INFO SB-ITM Version : 06.00.02
2026-05-08 09:00:02 INFO SB-ITM Delivery Date : 2026-05-06
2026-05-08 09:00:02 INFO SB-ITM License Key : SBITM-9999-9999-9999
2026-05-08 09:00:02 INFO Connected to IB Gateway at 127.0.0.1:4001 (clientId=2)
2026-05-08 09:00:02 INFO Waiting 1802 seconds (~0h 30m) until 09:30:05 (America/New_York)...
2026-05-08 09:30:04 INFO
2026-05-08 09:30:04 INFO Symbols : ['APA', 'FSM']
2026-05-08 09:30:04 INFO Max/pos : $20000.00
2026-05-08 09:30:04 INFO Buffer : 10.0%
2026-05-08 09:30:07 INFO Available cash : $285925.13
2026-05-08 09:30:07 INFO Buffer (10.0%) : $28592.51
2026-05-08 09:30:07 INFO Usable cash : $257332.62
2026-05-08 09:30:07 INFO Symbols count : 2
2026-05-08 09:30:07 INFO Allocation/sym : $20000.00
2026-05-08 09:30:08 INFO — Processing APA —
2026-05-08 09:30:09 INFO APA market price : $36.1700
2026-05-08 09:30:09 INFO APA quantity : 552 shares (~$19965.84)
2026-05-08 09:30:10 INFO APA order placed : orderId=34705 status=Filled
2026-05-08 09:30:10 INFO — Processing FSM —
2026-05-08 09:30:11 INFO FSM market price : $10.4900
2026-05-08 09:30:11 INFO FSM quantity : 1906 shares (~$19993.94)
2026-05-08 09:30:12 INFO FSM order placed : orderId=34706 status=Filled
2026-05-08 09:30:12 INFO === Entry Bot execution complete ===
2026-05-08 09:30:12 INFO Disconnected.
```

The Notepad window has a standard menu bar with "File", "Edit", "Format", "View", and "Help". The status bar at the bottom shows "Ln 1, Col 1", "100%", "Windows (CRLF)", and "UTF-8".

Automated trade execution supporting structured market participation.

Automated position protection and dynamic risk management.

Responsibilities

- Position monitoring
- Take-profit management
- Stop-loss protection
- Multi-level trailing management
- Risk exposure control

Key Capabilities

- Configurable TP and SL logic
- Four-level trailing framework
- Dynamic protection upgrades
- Real-time position supervision
- Automated risk management execution

Core Workflow Integration

Regime Bot → Scan Bot → Decision Layer → Bridge Bot → Entry Bot → **Risk Bot**

Centralized protection and trailing management layer for operational risk control.

Operational Evidence



2026_05_08_SB-ITM_Risk_Bot.log - Notepad

FileEditFormatViewHelp

2026-05-08 05:02:00 INFO
2026-05-08 05:02:00 INFO
2026-05-08 05:02:00 INFO
2026-05-08 05:02:00 INFO
2026-05-08 05:02:00 INFO
2026-05-08 05:02:00 INFO
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2026-05-08 05:02:03 INFO
2026-05-08 05:02:03 INFO
2026-05-08 05:02:03 INFO
2026-05-08 15:30:11 INFO
2026-05-08 15:30:11 INFO
2026-05-08 15:30:12 INFO
2026-05-08 15:30:13 INFO
2026-05-08 15:41:09 INFO
2026-05-08 15:41:09 INFO
2026-05-08 15:41:09 INFO
2026-05-08 15:41:09 INFO
2026-05-08 15:41:09 INFO
2026-05-08 15:47:55 INFO
2026-05-08 15:47:56 INFO
2026-05-08 15:47:57 INFO
2026-05-08 16:16:57 INFO
2026-05-08 16:16:57 INFO
2026-05-08 16:16:57 INFO
2026-05-08 16:16:57 INFO
2026-05-08 16:16:57 INFO
2026-05-08 16:16:57 INFO

=====

=== SB-ITM | Risk Bot started ===

=====

SB-ITM License Reference : CLIENT-9999

SB-ITM Version : 06.00.02

SB-ITM Delivery Date : 2026-05-06

SB-ITM License Key : SBITM-9999-9999-9999

Connected to TB Gateway at 127.0.0.1:4001 (clientId=1)

Trailing levels: L1: +2.5%+1.3% trail, L2: +3.5%+1.5% trail, L3: +4.5%+1.7% trail, L4: +5.5%+1.9% trail

Protection check interval: 30s

Bot started. Performing initial portfolio recovery scan...

RECOVERY: PNR [LONG 11.0 @ 81.35] state=MONITORING → MONITORING (TP=34680 SL=34681)

RECOVERY: AXF [LONG 8.0 @ 348.46] state=MONITORING → MONITORING (TP=34712 SL=34713)

RECOVERY: EAT [LONG 23.0 @ 156.08] state=MONITORING → MONITORING (TP=34642 SL=34643)

RECOVERY: IDXX [LONG 1.0 @ 595.00] state=MONITORING → MONITORING (TP=34684 SL=34685)

RECOVERY: META [LONG 1.0 @ 612.94] state=MONITORING → MONITORING (TP=34668 SL=34669)

RECOVERY: LDOS [LONG 11.0 @ 134.66] state=MONITORING → MONITORING (TP=34680 SL=34681)

RECOVERY: AMGN [LONG 2.0 @ 356.88] state=MONITORING → MONITORING (TP=34700 SL=34701)

RECOVERY: LOGI [LONG 14.0 @ 106.29] state=MONITORING → MONITORING (TP=34694 SL=34695)

New position detected: APA [LONG 552.0 @ 36.19] state=NEW

New position detected: FSM [LONG 1906.0 @ 10.52] state=NEW

APA: TP placed @ 41.62 (id=34707) SL placed @ 30.76 (id=34708) OCA=OCA_APA_1778247011

FSM: TP placed @ 12.10 (id=34709) SL placed @ 8.94 (id=34710) OCA=OCA_FSM_1778247012

FSM trigger L1 reached (last=10.78 trigger=10.78). Switching to trailing.

FSM: Cancelling TP order 34709...

FSM: TP order 34709 cancelled.

FSM: Cancelling SL order 34710...

FSM: SL order 34710 already gone.

FSM: Trailing Stop L1 placed (1.3%) id=34711

FSM: Upgrading trailing stop to L2 (trigger=+3.5%, trail=1.5%)

FSM: Old trailing stop 34711 cancelled.

FSM: Trailing Stop L2 placed (1.5%) id=34712

LOGI trigger L1 reached (last=108.96 trigger=108.95). Switching to trailing.

LOGI: Cancelling TP order 34694...

LOGI: TP order 34694 cancelled.

LOGI: Cancelling SL order 34695...

LOGI: SL order 34695 already gone.

LOGI: Trailing Stop L1 placed (1.3%) id=34713

<

Ln 1, Col 1

100%

Windows (CRLF)

UTF-8

Structured protection logic supporting disciplined risk management automation.

Watchdog Bot

Operational continuity monitoring and automated recovery management.

Responsibilities

- Ecosystem process monitoring
- Service availability supervision
- Automated restart management
- Operational continuity control
- Critical workflow monitoring

Key Capabilities

- Automated recovery workflows
- IB Gateway supervision
- Process restart automation
- Continuous ecosystem monitoring
- Reduced operational downtime

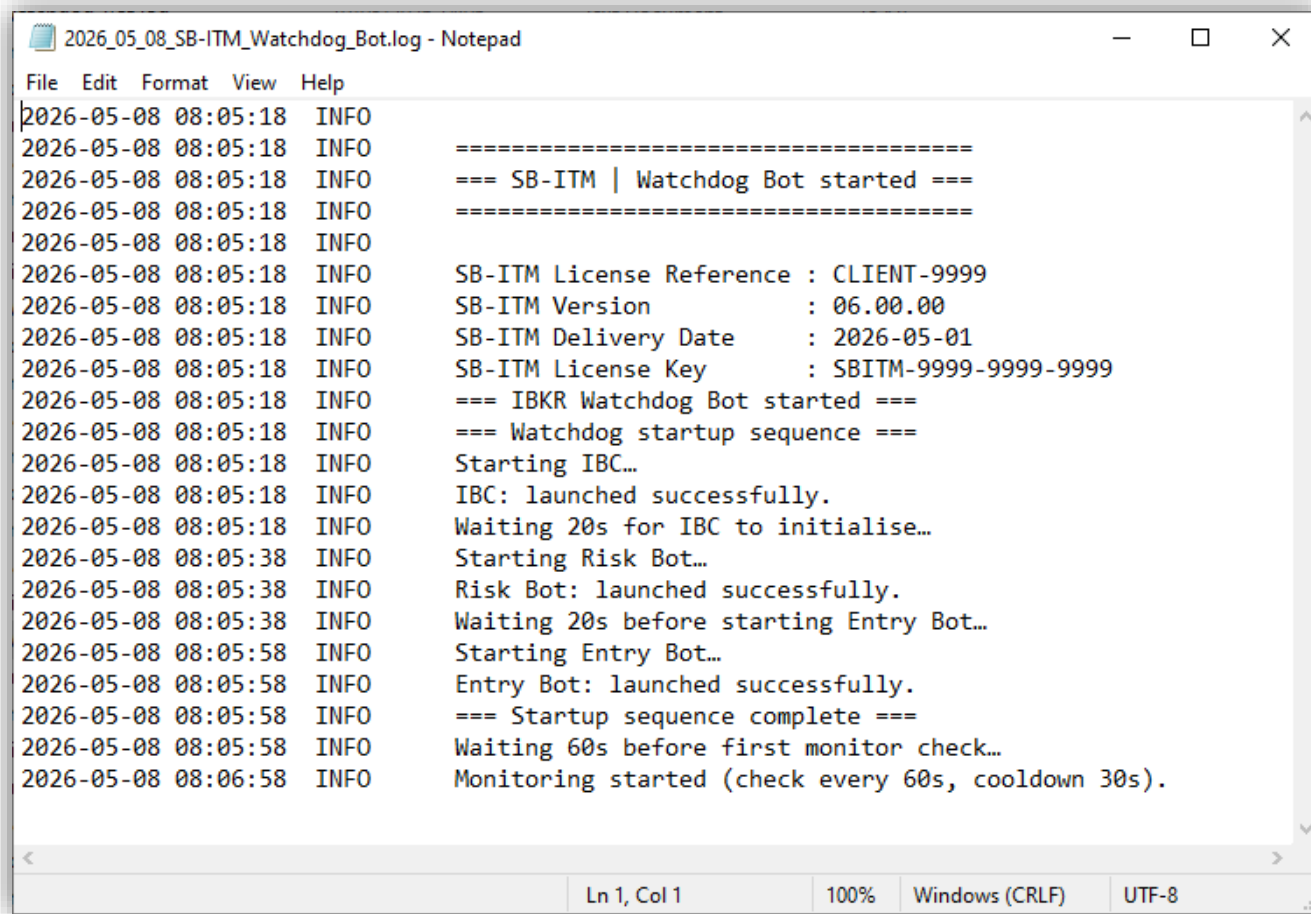
Support Layer Integration

IB Gateway → Watchdog Bot → Risk Bot

Dedicated operational continuity service ensuring ecosystem stability and recovery.

Watchdog Bot

Operational Evidence

A screenshot of a Notepad window titled "2026_05_08_SB-ITM_Watchdog_Bot.log - Notepad". The window displays a log file with the following content:

```
File Edit Format View Help
2026-05-08 08:05:18 INFO
2026-05-08 08:05:18 INFO =====
2026-05-08 08:05:18 INFO === SB-ITM | Watchdog Bot started ===
2026-05-08 08:05:18 INFO =====
2026-05-08 08:05:18 INFO SB-ITM License Reference : CLIENT-9999
2026-05-08 08:05:18 INFO SB-ITM Version : 06.00.00
2026-05-08 08:05:18 INFO SB-ITM Delivery Date : 2026-05-01
2026-05-08 08:05:18 INFO SB-ITM License Key : SBITM-9999-9999-9999
2026-05-08 08:05:18 INFO === IBKR Watchdog Bot started ===
2026-05-08 08:05:18 INFO === Watchdog startup sequence ===
2026-05-08 08:05:18 INFO Starting IBC...
2026-05-08 08:05:18 INFO IBC: launched successfully.
2026-05-08 08:05:18 INFO Waiting 20s for IBC to initialise...
2026-05-08 08:05:38 INFO Starting Risk Bot...
2026-05-08 08:05:38 INFO Risk Bot: launched successfully.
2026-05-08 08:05:38 INFO Waiting 20s before starting Entry Bot...
2026-05-08 08:05:58 INFO Starting Entry Bot...
2026-05-08 08:05:58 INFO Entry Bot: launched successfully.
2026-05-08 08:05:58 INFO === Startup sequence complete ===
2026-05-08 08:05:58 INFO Waiting 60s before first monitor check...
2026-05-08 08:06:58 INFO Monitoring started (check every 60s, cooldown 30s).
```

The status bar at the bottom of the Notepad window shows "Ln 1, Col 1", "100%", "Windows (CRLF)", and "UTF-8".

Operational continuity services designed to maintain ecosystem availability.

Snapshot Bot



Automated portfolio reporting and operational visibility generation.

Responsibilities

- Portfolio snapshot generation
- Position reporting
- PnL visibility management
- Protection status reporting
- Automated PDF reporting

Key Capabilities

- Professional PDF generation
- Portfolio visibility reporting
- TP / SL and trailing status integration
- Automated reporting workflows
- Structured operational reporting

Support Layer Integration

Snapshot Bot – Cash Bot – Open Positions Monitor Bot – Status Dashboard

Automated portfolio reporting layer supporting monitoring and operational visibility.

Operational Evidence

Portfolio Snapshot — 2026-06-07 13:45:35

Symbol	Company Name	Sector	Quantity	Entry Price	Current Price	Take Profit Price	Stop Loss Price	Trailing %	PnL USD	PnL %	Behaviour
GE	GENERAL ELECTRIC	Industrial	364.0	324.94	327.65	389.92	292.44	-	986.90	0.83%	TP/SL Protected
GOOGL	ALPHABET INC-CL A	Communications	309.0	382.89	371.97	459.47	344.60	-	-3,374.43	-2.85%	TP/SL Protected
CSCO	CISCO SYSTEMS INC	Communications	984.0	120.34	130.00	144.40	108.30	-	9,510.36	8.03%	TP/SL Protected
META	META PLATFORMS INC-CLASS A	Communications	186.0	635.57	627.57	762.68	572.01	-	-1,487.99	-1.26%	TP/SL Protected

Automated portfolio reporting supporting operational visibility and tracking.

Portfolio cash visibility and capital monitoring automation.

Responsibilities

- Cash and account value monitoring
- Portfolio valuation reporting
- Allocation visibility management
- Realized and unrealized PnL tracking
- Capital exposure monitoring

Key Capabilities

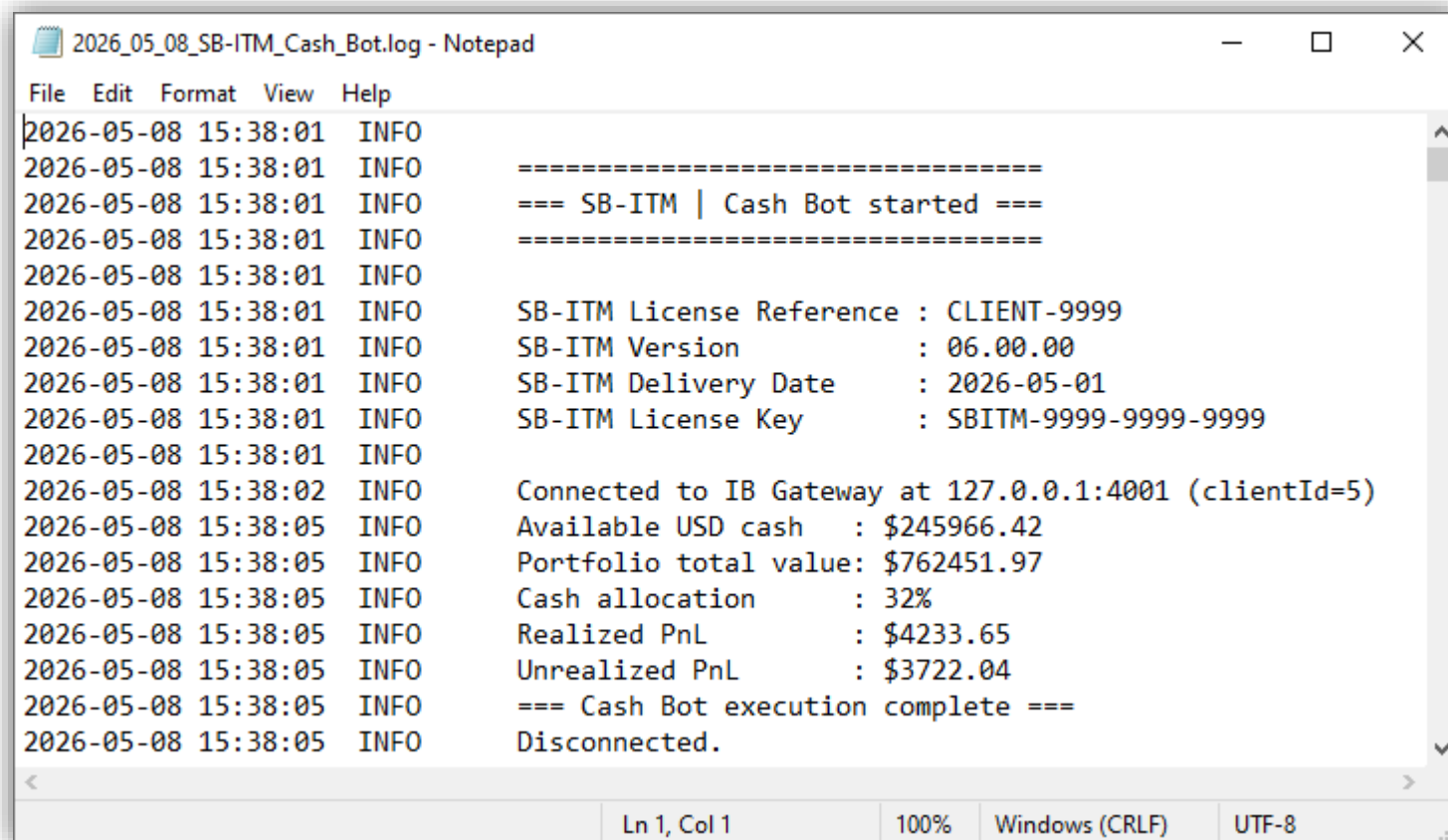
- Portfolio cash reporting
- Allocation visibility
- Current account valuation monitoring
- Capital exposure overview
- Operational portfolio visibility

Support Layer Integration

Snapshot Bot – Cash Bot – Open Positions Monitor Bot – Status Dashboard

Dedicated capital monitoring service providing portfolio cash visibility.

Operational Evidence

A screenshot of a Notepad window titled "2026_05_08_SB-ITM_Cash_Bot.log - Notepad". The window displays a log file with the following content:

```
File Edit Format View Help
2026-05-08 15:38:01 INFO
2026-05-08 15:38:01 INFO =====
2026-05-08 15:38:01 INFO === SB-ITM | Cash Bot started ===
2026-05-08 15:38:01 INFO =====
2026-05-08 15:38:01 INFO SB-ITM License Reference : CLIENT-9999
2026-05-08 15:38:01 INFO SB-ITM Version : 06.00.00
2026-05-08 15:38:01 INFO SB-ITM Delivery Date : 2026-05-01
2026-05-08 15:38:01 INFO SB-ITM License Key : SBITM-9999-9999-9999
2026-05-08 15:38:01 INFO
2026-05-08 15:38:02 INFO Connected to IB Gateway at 127.0.0.1:4001 (clientId=5)
2026-05-08 15:38:05 INFO Available USD cash : $245966.42
2026-05-08 15:38:05 INFO Portfolio total value: $762451.97
2026-05-08 15:38:05 INFO Cash allocation : 32%
2026-05-08 15:38:05 INFO Realized PnL : $4233.65
2026-05-08 15:38:05 INFO Unrealized PnL : $3722.04
2026-05-08 15:38:05 INFO === Cash Bot execution complete ===
2026-05-08 15:38:05 INFO Disconnected.
```

The status bar at the bottom shows "Ln 1, Col 1", "100%", "Windows (CRLF)", and "UTF-8".

Portfolio cash monitoring supporting structured capital supervision.

Open Positions Price Monitor Bot



Real-time position monitoring and graphical portfolio visualization.

Responsibilities

- Live position monitoring
- Real-time chart visualization
- Relative performance tracking
- Benchmark comparison
- Interactive monitoring dashboard

Key Capabilities

- Dash and Plotly dashboard
- Real-time chart updates
- SPY and QQQ benchmarking
- Relative performance visualization
- Interactive monitoring interface

Support Layer Integration

Snapshot Bot – Cash Bot – Open Positions Monitor Bot – Status Dashboard

Real-time visualization layer supporting operational monitoring and position tracking.

Open Positions Price Monitor Bot



Operational Evidence



Real-time portfolio visualization supporting operational market supervision.

Risk Management Framework

Professional Trading Workflow



Risk Management Framework



SB-ITM applies a structured protection framework designed to supervise open positions, automate protection logic and maintain trading discipline during live market conditions.

Protection Layers

- Take Profit deployment
- Stop Loss protection
- Dynamic trailing supervision
- Continuous position monitoring

Risk Logic

- Configurable TP / SL parameters
- Four-level trailing framework
- Progressive protection upgrades
- Automated risk execution

Dynamic Trailing Protection

Entry → Initial TP / SL Protection → Trailing Level 1 → Trailing Level 2 → Trailing Level 3 → Trailing Level 4

Designed to preserve disciplined risk management through structured automated protection layers.

Status Dashboard



The Status Dashboard provides a consolidated view of the trading environment, market regime, selected symbols, bot statuses, account information and open positions.

STATUS DASHBOARD

System A · V2.8 · read-only operational snapshot · generated 2026-05-23 09:44:44

ENVIRONMENT

LIVE

MARKET MODE

BULL

ENTRY SYMBOLS

3

SYSTEM STATUS

OK

SYSTEM

OK

Environment	LIVE
Account	U24358677
Host / Port	127.0.0.1 : 4001
Version	07.03.01

ENTRY BOT

OK

Execution Date	2026-05-23
Execution Time	09:30:03
Cutoff Time	09:40:03
Symbols	LKNCY, DE, APH

RISK BOT

OK

Take Profit	15%
Stop Loss	15%
Trail RTH Only	YES
Levels	L1 3%/1.5%, L2 4%/1.3%, L3 5%/1.1%, L4 6%/0.9%

LAST SCAN

OK

Generated	2026-05-23 09:24
Rows	1025
Candidates	13
Top	LKNCY (32), DE (25), APH (24), MAIN (24)

BOT STATUS

OK

IB Gateway / IBC	CONNECTED
Watchdog Bot	RUNNING 2026-05-23 09:42
Risk Bot	RUNNING 2026-05-23 09:42
Entry Bot	LAST RUN 2026-05-23 09:26
Regime Bot	LAST RUN 2026-05-23 09:14
Scan Bot	LAST RUN 2026-05-23 09:24
Bridge Bot	LAST RUN 2026-05-23 09:26
Price / Position Monitor	LAST RUN 2026-05-23 09:29
Snapshot Bot	LAST RUN 2026-05-23 09:27
Cash Bot	LAST RUN 2026-05-23 09:26
-	-
-	-
-	-

OPEN POSITIONS

OK

PNR	Qty 11.0 TP OK SL OK
IDXX	Qty 1.0 TP OK SL OK
META	Qty 1.0 TP OK SL OK
CNM	Qty 20.0 TP OK SL OK
GILD	Qty 3.0 TP OK SL OK
AXP	Qty 8.0 TP OK SL OK
EAT	Qty 23.0 TP OK SL OK
MAIN	Qty 17.0 TP OK SL OK
LDOS	Qty 11.0 TP OK SL OK
AMGN	Qty 2.0 TP OK SL OK
-	-
-	-
-	-

NEXT SCHEDULED RUNS

OK

Summary	3 task(s) found
Next Runs	No upcoming task found

STATUS NOTES

No critical warning detected.

Dashboard shows the first 10 open position(s).

Latest scan file detected: A_Morning_Scan_20260523_0915.csv

Read-only dashboard. No YAML/JSON file, Scheduled Task, IBKR order or position is modified.

Refresh: close and relaunch shortcut / browser refresh shows the last generated snapshot.

Monitoring & Reporting



SB-ITM integrates dedicated monitoring and reporting services designed to supervise ecosystem activity, maintain operational continuity and provide structured portfolio visibility throughout the trading lifecycle.

Monitoring Services

- Dedicated bot activity supervision
- Real-time operational monitoring
- Automated workflow continuity checks
- Centralized execution logging

2026_05_08_SB-ITM_Watchdog_Bot.log
2026_05_08_SB-ITM_Risk_Bot.log
2026_05_08_SB-ITM_Entry_Bot.log
2026_05_08_SB-ITM_Bridge_Bot.log
2026_05_08_SB-ITM_Scan_Bot (2).log
2026_05_08_SB-ITM_Regime_Bot.log

Reporting Services

- Automated portfolio snapshot generation
- Structured PDF, CSV and Excel outputs
- Morning Scan reporting workflows
- Historical operational traceability

SB-ITM_Morning_Scan_20260508_0300.log
SB-ITM_Morning_Scan_20260508_0300.xlsx
SB-ITM_Morning_Scan_20260508_0300.csv

Portfolio_Snapshot_2026-05-08_04-19-53.pdf
Portfolio_Snapshot_2026-05-08_15-43-10.pdf
Portfolio_Snapshot_2026-05-08_17-27-08.pdf
Portfolio_Snapshot_2026-05-08_19-32-02.pdf
Portfolio_Snapshot_2026-05-08_20-36-23.pdf
Portfolio_Snapshot_2026-05-08_21-36-50.pdf
Portfolio_Snapshot_2026-05-08_22-07-51.pdf

Designed to maintain operational transparency through centralized monitoring and structured reporting services.

Technical Stack

Professional Trading Workflow



Technical Stack



Infrastructure

- Windows Server 2025
- Managed VPS Infrastructure
- Interactive Brokers
- IB Gateway

Core Technologies

- Python Automation
- IBKR API Integration
- IBC Automation
- YAML Configuration

Monitoring & Reporting

- Dash Monitoring UI
- Plotly Visualization Engine
- PDF Reporting
- CSV / Excel Exports

Operational Automation

- Task Scheduler
- Power Automate
- Automated Workflows
- Centralized Logging

Designed to support scalable and structured trading automation environments.

Who is SB-ITM Designed For?

Professional Trading Workflow



Who Is SB-ITM Designed For?



SB-ITM is designed for disciplined traders seeking structured automation, operational continuity and configurable workflow supervision on Interactive Brokers.

Ideal User Profiles

- Swing traders using structured workflows
- Interactive Brokers users
- Semi-automated or fully-automated operators
- Users seeking disciplined automation and risk control

Typical Environment

- Managed Windows Server 2025 VPS
- Interactive Brokers account and market data access
- Multi-position portfolio management
- Structured daily operational routines

Designed for structured and disciplined trading automation environments.

Support

Professional Trading Workflow



Support Request Checklist



A structured support request reduces investigation time and avoids unnecessary back-and-forth.

Users should provide operational evidence while excluding credentials and sensitive account information.

Support starts with clear evidence: version, bot, date, mode, Support ZIP, log and screenshot.

System Version

SB-ITM version, Control Center version and environment.

Incident Context

Bot name, date, time zone, mode and expected behavior.

Evidence

Relevant log file, screenshot and generated report when available.

Security

Never share IBKR credentials, passwords or full account identifiers.

Support & Assistance



SB-ITM includes dedicated documentation, operational guidance and structured support workflows designed to support safe ecosystem adoption.

Documentation Center

- VPS First-Start Guide
- Support Guide
- Ecosystem Presentation
- Scheduled Tasks Guide

Support Process

- Dedicated SB-ITM support channel
- Documentation Center and tutorials
- Managed VPS assistance
- Structured onboarding and operational support

Designed to support autonomous operation through structured, evidence-based assistance.

Disclaimer & User Responsibility



SB-ITM is a technical trading automation ecosystem. It assists with structured analysis, workflow automation and risk supervision, but it does not eliminate market risk.

Users remain responsible for their trading decisions, configuration choices and Interactive Brokers account activity.

- **LIVE activation requires informed user validation and operational supervision.**

- **No Performance Guarantee**
- Market outcomes remain uncertain and losses are possible.

- **No Personalized Advice**
- The system is not a substitute for individual financial advice.

- **PAPER First**
- Users should validate configuration and behavior in PAPER before LIVE use.

- **External Dependencies**
- IBKR, market data, network, VPS and third-party services can affect operation.



Thank You

Get In Touch



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