

SMART ALPHA INVESTOR

Full User Manual

Complete public guide for Smart Alpha Investor navigation, signals, income tools, investing, news, and layouts.

Version: v4.7 Public Guide Pack
Website: wealth.amtechlabs.com

Educational and platform-use guide. This guide does not provide financial, tax, or legal advice and does not guarantee investment results.

Table of Contents

1. Platform Overview
2. Recommended Daily Workflow
3. Main Tabs
4. Guest vs Logged-In Use
5. Simple vs Pro View
6. Risk and Discipline Rules

Platform Overview

Smart Alpha Investor (SAI) is a web-based investing and trading intelligence platform for active traders, long-term investors, options-income users, and family wealth builders.

- Signals Tab: symbol cards, market scores, Simple/Pro views, and refresh controls.
- Today's Plan: market regime, risk, deployment guidance, V3.5 live updates, and V3.6 weekly positioning.
- Income Tab: Covered Calls (CC) and Cash Secured Puts (CSP) workflow.
- Investing Tab: ETF education, DCA thinking, retirement/family investing concepts.
- News & Learning: market news and educational context.
- Guide Tab: downloadable manuals and future searchable help.

Use SAI signals as decision support only. Confirm entries, exits, sizing, risk, and taxes independently before acting. Avoid oversized trades and avoid assuming any signal guarantees profit.

Recommended Daily Workflow

- Start with Today's Plan to understand market regime and risk.
- Review V3.5 Live Update if market is open.
- Review V3.6 Weekly Positioning for LEAPS, swing, income, hedge, and avoid-chasing areas.
- Use Symbol Cards to inspect Day/Swing/Long scores and technical details.
- Use Income Tab for CC/CSP candidates only after confirming support/resistance and risk.
- Use Investing Tab for long-term DCA and ETF allocation thinking.

Main Tabs

Signals	Watchlist-based trading/investing signal cards.	Day, swing, long-term, LEAPS watch
Today's Plan	Market-wide plan and risk/deployment guidance.	Before market, intraday, weekly plan
Income	CC/CSP strategy candidates and income workflow.	Options income
Investing	ETF education and DCA/retirement planning.	Family Roth, long-term accounts
News & Learning	Market news and investor learning.	Context and education
Guide	PDF manuals and public help.	New users and reference

Guest vs Logged-In Use

- Guest users can explore the public template, guides, and basic platform concepts.
- Logged-in users can customize watchlists, save preferences, and personalize symbol monitoring.

- Some Pro views or personalization may be locked for guests and unlocked with free registration.
- Admin-only/private features are not part of the public Guide tab.

Simple vs Pro View

Simple	Essential score, action posture, and summary.	Fast mobile reading, beginners, quick checks
Pro	Technical details including RSI, VWAP, EMAs, momentum, support/resistance.	Active traders and advanced review

Risk and Discipline Rules

- Avoid chasing extended moves after large multi-day rallies.
- Use starter positions when market is stretched or mixed.
- Use hedges only after confirmation, not simply because price looks high.
- For options, define max loss, stop/review rule, and profit target before entry.
- Separate long-term investing decisions from short-term trading decisions.