TradinSolutions EXECUTION LAYER

PLATFORM GUIDE

Sizing and risk rules per account

Choose how each Follower sizes a copied trade, map symbols and contracts between brokers, set per-account limits and filters, and read the instance log.

WORKS ON MT4 MT5 cTrader Tradovate NinjaTrader

STARTER, PRO AND HEDGE UPDATED 08 OCTOBER 2026

VIDEO · Episode 04 · Sizing and risk rules per account

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01

What you'll have at the end

Every Follower in your instance sizing and stopping the way you intend:

- A sizing mode on each Follower, so accounts of different sizes take a consistent risk on the same trade.
- Symbols that resolve correctly on each broker, including a name map where a Follower's broker uses a different name (a Provider's GOLD reaching a Follower that calls it XAUUSD).
- Per-account limits and filters. When a Follower reaches a limit, that Follower's copies from the instance are closed and it stops for the day, while the other Followers carry on.
- The confidence to read the instance log and know what to change.

What these settings do not do:

- They do not choose your limits for you. The relay enforces the numbers you enter.

- They do not make an account compliant with any firm's rules. No tool can. Your firm's terms, and how your firm counts, are yours to check.
- They do not replace a protective stop on each position. If the service is unavailable, open positions stay at your broker with whatever stops they carry.

02

Before you start

- **A running instance** with at least one Follower (Episode 03). Use demo accounts while you tune these settings.
- **Your plan.** Sizing, mapping and limits are part of the copier on Starter, Pro and Hedge. Every platform starts on Starter; the free plan connects no broker accounts. Account limits per plan are in Episode 11.
- **Your numbers, written down.** For each Follower: the risk per trade you accept, and, for a funded account, your firm's daily loss rule, drawdown rule and how the firm measures them (from balance or from equity, and at what time its day resets).
- **Your total exposure.** If one trade reaches every account, your real exposure is the per-account risk multiplied by the number of accounts. Five accounts at 0.5% each is 2.5% of your combined capital on one idea, before correlation. Decide the total you accept first, then divide it across accounts.

Where these settings live

- **When you build an instance:** the **Settings** step of the wizard (after Source and Destinations) sets sizing, filters and limits for every Follower you selected. You finish with **Create and activate**.
- **After the instance is live:** open the instance in the Cockpit and choose **TUNE** on a destination to change that Follower alone. Save with **Save and apply**; the change applies within about 15 seconds.

03

Sizing modes

Each Follower works out its own size. These are the sizing modes as they appear in Settings and in TUNE:

MODE	HOW IT SIZES A COPY
Risk % of balance	A percentage of the Follower's balance, from the Provider's distance to its stop
Risk % of equity	The same, from the Follower's equity
Multiplier	The Provider's lot size multiplied by the figure you set
Fixed lot	The same lot size on every copy, whatever the Provider traded
Same as the provider	The Provider's own size. This is the default on futures destinations.
Lot per $1,000	A lot size for every 1,000 of the Follower's balance

MODE	HOW IT SIZES A COPY
Proportional multiplier	Scales with the Provider's position relative to account size

Risk sizing can also be **fee-adjusted**: enter **Commission per lot** and **Overnight fee per lot** so the fees are counted in the risk.

How risk sizing works

The two risk modes keep risk consistent as the balance moves. The size comes from three things:

1. That Follower's own balance (Risk % of balance) or equity (Risk % of equity).
2. The risk percentage you set for it.
3. The **Provider's** distance from its open price to its stop. The Follower's own fill price is not used.

That way a €10,000 account and a €100,000 account can both take, say, 1% risk on the same trade.

How sizes are rounded depends on the mode:

- **Risk modes:** the size rounds down, and a size below the broker's minimum is skipped and logged rather than rounded up.
- **All other modes:** a size below the broker's minimum is raised to the minimum. On futures, a copy is never smaller than one contract.

WHEN THE PROVIDER'S TRADE HAS NO STOP

Risk sizing needs a stop to measure from. If a Provider trade has no stop, a risk-sized copy opens at the **broker's minimum size**. To refuse those trades instead, turn on **Skip trades with no stop**; the log then shows "require SL (the provider trade has none)".

Signals size from your settings too

For Telegram, Discord and TradingView sources, the size comes from your own settings, never from the lot size the channel posted. A channel's "0.50 lots" on gold with a $6 stop is about 3% risk on a $10,000 account and 0.6% on $50,000. That gap is exactly what per-account sizing removes. Signal destinations have their own settings, covered in Episodes 05 and 06.

04

Symbol and contract mapping

Brokers name the same market differently. Before a copy goes out, the relay translates the Provider's symbol into each Follower broker's name for it.

- **Prefix and suffix differences are matched automatically.** EURUSD on the Provider reaches EURUSD.m on a broker that adds a suffix.
- **A different name needs a name map.** GOLD is not turned into XAUUSD automatically. Open **Settings** → **Symbols** → **Name map** and enter one line per symbol, in the form `PROVIDER=FOLLOWER`, for example `GOLD=XAUUSD`.

Mapping is set per destination, so each Follower can resolve symbols its own way. If a symbol cannot be resolved on a Follower's broker, that copy is skipped and logged with the reason. It is never guessed.

Mapping to futures contracts

Copying a CFD trade to a Tradovate or NinjaTrader account needs a contract rule, set per destination under **Settings** → **Contracts**:

- **WHEN THE PROVIDER TRADES … → TRADE … × ratio:** pick the Provider's instrument, the contract the Follower trades and the ratio between them. Add more with **+ ADD A RULE**.
- **MICRO ↔ MINI:** switch a rule between the micro and the mini contract.
- **PIN A MONTH:** fix the rule to one contract month, found through **SEARCH CONTRACTS**. **UNPIN THE MONTH** removes it again.

Standard ratios are built in, such as ten micros per mini on ES, NQ, YM, RTY, GC, HG, CL and the currency futures. Trades with no rule are skipped and logged. Episode 07 covers futures in full.

05

Per-account limits

Each Follower carries its own limits. When a Follower reaches a limit, **every copy this instance holds on that Follower is closed, and the Follower stops receiving copies until 00:00 UTC.** The other Followers carry on. The exceptions are noted in the table.

LIMIT	UNIT	WHAT HAPPENS WHEN IT IS REACHED
Lock out after losing	Money	Closes and stops until 00:00 UTC
Daily drawdown cap	% of the day-start balance	Closes and stops until 00:00 UTC
Losing trades in a row	Count	Closes and stops until 00:00 UTC
Trailing drawdown cap	% below today's equity high	Closes and stops until 00:00 UTC
Finish the day at	The figure you set	Closes and stops until 00:00 UTC
Pause the instance at	The figure you set	Pauses, then resumes on its own
Per-instrument limits	`SYMBOL=AMOUNT`, one per line	Closes that symbol for the rest of the day; other symbols carry on
Basket stop and target	This instance's combined P&L	**Close basket up:** closes the basket and keeps trading. **Close basket down:** closes the basket and locks the day.
Flatten at end of day	A UTC time (default 23:50), optionally on one weekday only	Closes this instance's copies at that time

Two rules apply to every lock:

- **There is no manual unlock.** A locked Follower resumes at 00:00 UTC.

- **Changing a setting does not lift a lock.** Saving a new figure leaves the Follower locked until 00:00 UTC.

HOW THE DAY IS COUNTED

The day runs from 00:00 UTC. The daily loss is always measured as equity against the balance at 00:00 UTC. The app cannot be set to match the way a particular firm counts, so if your firm measures differently (from balance, or from a different reset time), set your figure tighter than the firm's own.

06

Filters

Filters decide whether a copy goes out at all. They do not close anything.

FILTER	WHAT IT DOES
Reject beyond slippage	Holds a copy when the price has moved further from the Provider's price than you allow (points on CFDs, ticks on futures). A held copy is re-checked and placed if the price comes back.
Skip trades with no stop	Refuses any Provider trade that has no stop.
Only copy from / until	Only copies trades that open inside these hours (UTC).
Copy on Mondays–Fridays	Only copies trades on the weekdays you choose.

SETTING LIMITS FOR A FUNDED ACCOUNT

- **Set each limit below your firm's own figure,** not at it. Open positions need room to close, and the app's day (00:00 UTC, equity against the day-start balance) may not be the way your firm counts.
- **Read your firm's current terms** before connecting the account, and ask them in writing when a clause is unclear.

Relay limits and the Toolkit risk tools

The limits above are applied by the hosted relay to copied trades. They are separate from the risk tools in the Toolkit, such as Propfirm Rules Manager (daily and maximum drawdown limits, an equity floor and a session close, enforced account-wide; from Pro) and DisciplineGuard Pro (from Starter). Those are tools you install in your own terminal, and they act on that terminal's account. Episode 10 covers them.

07

Step-by-step: set sizing and limits on a Follower

1. Open the **Cockpit** and open your instance.
2. Choose **TUNE** on the destination (Follower) you want to change.
3. **Choose a sizing mode.** For a funded account, a common starting point is Risk % of balance with a small percentage.

4. **Check symbol mapping** for the instruments you trade. Add a line to the **Name map** wherever this broker uses a different name; prefixes and suffixes are matched for you.
5. **Set the limits** that match your plan or your firm's rules, each below the firm's own figure.
6. **Set any filters** you want: hours, weekdays, slippage and trades with no stop.
7. Choose **Save and apply**. The change applies within about 15 seconds. Repeat for each Follower; each account can have different numbers.
8. On demo, place a test trade on the Provider and confirm each Follower's size and behaviour.
9. On a demo Follower, trigger a limit on purpose (for example, a very low **Lock out after losing**). Confirm its copies are closed and it stops, with the reason logged, while the others carry on. That Follower stays locked until 00:00 UTC.

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Reading the log

Every copy is listed in the instance view in the Cockpit. The **STATE** column shows where each copy stands:

- **OPEN:** the copy is open at the Follower's broker.
- **CLOSED:** the copy has closed.
- **HELD:** the copy is waiting on a rule, for example a slippage limit or a time window.
- **ERROR:** the copy could not be placed.

The reason for every hold, skip and error is written under **ACTIVITY**. Nothing is dropped silently.

WHY A COPY DID NOT GO OUT	WHAT TO DO
The Follower reached one of its limits	Nothing, if the limit did its job. Review the limit if it was set wrongly.
The Follower's broker does not list the symbol	Add a line to that destination's Name map.
No contract rule for that instrument	Add a rule under Settings → Contracts for the destination (Episode 07).
A risk-sized copy fell below the broker's minimum	Raise the risk percentage, or accept the skip. On futures, map to micros.
A filter stopped it: hours, weekdays, slippage, or a Provider trade with no stop	Nothing, if intended. Adjust the filter if not.
The account shows the "reconnect needed" pill	Choose **RECONNECT** on the account's row under Accounts (Episode 13).

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Worked example

Say you run three funded MT5 accounts with two different firms, and trade from a personal MT5 account. That is four MT5 accounts, more than Starter's two, so you are on Pro.

1. **Decide your total risk first.** You are comfortable with 1.5% of combined capital on one idea. Across three accounts, that is 0.5% per account.
2. **Build one instance:** personal MT5 as the Provider, the three funded accounts as Followers.
3. **Sizing:** Risk % of balance, 0.5% on each Follower. Each Follower sizes from its own balance and the Provider's stop distance, so the larger account takes a larger lot and all three take the same percentage.
4. **Symbol mapping:** the personal account calls gold "GOLD"; one firm's broker calls it "XAUUSD", the other "XAUUSD.m". A different name is not matched automatically, so you add `GOLD=XAUUSD` to the first destination's Name map and `GOLD=XAUUSD.m` to the second's. You check each destination resolves gold before the first live trade.
5. **Limits:** firm A measures daily loss from the start-of-day balance; firm B from equity, with its own reset time. The app always counts equity against the 00:00 UTC balance, so you set each account's **Lock out after losing** tighter than its firm's figure. You add **Losing trades in a row** on all three.
6. **Test on demo** with the same settings through at least one busy session.
7. **What you will see on a bad day:** account B reaches its Lock out after losing figure. B's open copies are closed, and B is locked until 00:00 UTC, with the reason under ACTIVITY. Accounts A and C still receive the next trade.

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Troubleshooting

ONE FOLLOWER DID NOT GET A TRADE THE OTHERS GOT

Open the instance in the Cockpit and read that copy's reason under ACTIVITY. The reason tells you which setting to look at.

THE LOT SIZE ON A FOLLOWER IS SMALLER THAN EXPECTED, OR ZERO

In the risk modes, the size is worked out from the Provider's stop distance and rounds down. If the result was below the broker's minimum, the copy was skipped rather than rounded up. Check the risk percentage and the Provider's stop distance. If the Provider's trade had no stop, the copy opened at the broker's minimum.

GOLD COPIES TO ONE ACCOUNT BUT NOT ANOTHER

The second broker probably names it differently. Only prefixes and suffixes are matched automatically; add the name to that destination's Name map.

A FOLLOWER STOPPED RECEIVING COPIES FOR THE REST OF THE DAY

A limit was reached, and the Follower is locked until 00:00 UTC. There is no manual unlock, and changing a setting does not lift the lock. If the reason under ACTIVITY is a time or weekday filter instead, the Follower carries on when the window opens.

I CHANGED A SETTING BUT THE OLD BEHAVIOUR CONTINUED

Make sure you changed the right destination in TUNE and chose **Save and apply**. Changes apply within about 15 seconds. A lock already in place stays until 00:00 UTC.

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FAQ

WHICH SIZING MODE SHOULD I START WITH?

On demo first. Risk % of balance with a small percentage is a common starting point for funded accounts.

CAN EACH FOLLOWER USE DIFFERENT SETTINGS?

Yes. The wizard applies one configuration to the Followers you select in it; after that, each destination has its own settings in TUNE.

DOES THE COPIER KEEP ME WITHIN MY FIRM'S RULES?

No tool can make you compliant, and TradinSolutions does not claim to. The copier gives you sizing per account, limits per account, and a record of every copy with its reason. The rules you enter, and whether they match your firm's current terms, are yours to check.

DOES A HELD TRADE GET PLACED LATER?

It can be, while the Provider is still in the trade. A copy held by the slippage filter is re-checked and placed if the price comes back. A copy held by the hours or weekday filter, or by **Wait before opening**, can also be placed later.

WHAT HAPPENS TO OPEN POSITIONS WHEN A LIMIT IS REACHED?

Most limits close every copy this instance holds on that Follower and stop it until 00:00 UTC. A per-instrument limit closes only that symbol for the day. **Pause the instance at** pauses and resumes on its own. **Close basket up** closes the basket and keeps trading; **Close basket down** closes it and locks the day.

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