



Social Trading

Follower User Guide

DISCLAIMER

Trading Forex and CFDs carries significant risk and may result in losses exceeding your initial deposit. These instruments do not grant ownership of the underlying assets or entitlement to associated benefits, such as dividends. Only trade with funds you can afford to lose. Make sure you fully understand the risks and read our legal documents before you start.

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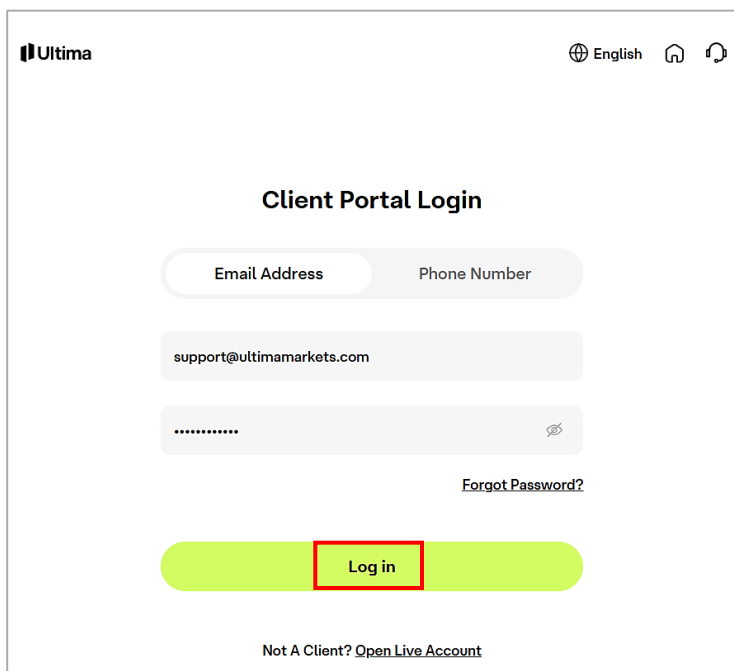
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**Follower
Registration**

Portal Login

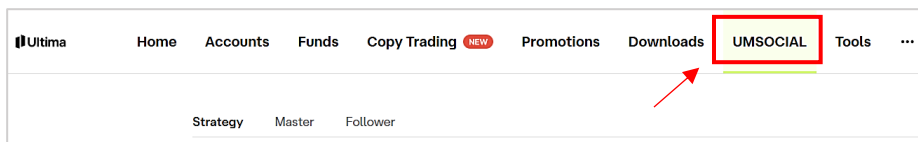
Subscription

Account Overview



Go to [Client Portal](#).

Enter **[Registered email]** and **[Password]**, click **[Login]**.



Then, click **[UMSOCIAL]** in the top menu or click on this [link](#).

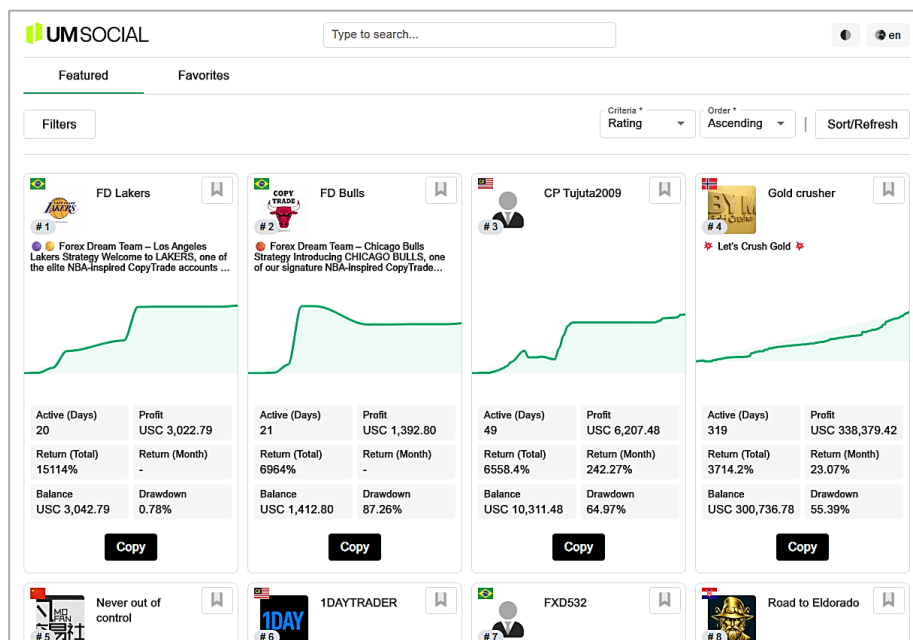
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**Follower
Registration**

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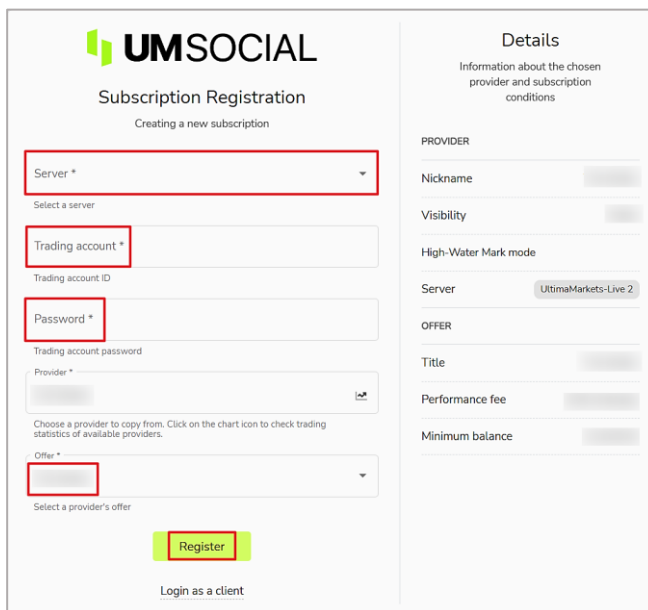
Subscription

Account Overview



Select your preferred Social Trading Provider and click **[Copy]**.

Alternatively, Follower may join the strategy using the Join Link provided by the Provider.



The screenshot shows the UMSocial Subscription Registration form. The form is titled 'Subscription Registration' and 'Creating a new subscription'. It contains several input fields and a 'Register' button. The fields are:

- Server *
- Trading account *
- Password *
- Offer *

There are also checkboxes for 'High-Water Mark mode' and 'Performance fee'. The 'Register' button is highlighted in green. Below the form, there is a link to 'Login as a client'.

Select the trading account to use for copy trading and fill in the required information. Then, choose an **[Offer]** and click **[Register]** to proceed.

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Social Trading

Server *
UltimaMarkets-Live

Select a server

Username *
812345

Trading account's ID (same as in MetaTrader)

Password *
••••••••

Trading account's password (same as in MetaTrader)

Log In

[Register as a provider](#) [Register as a follower](#)

Go to [UMSocial](#).

Select **[Server]**, enter **[Trading account number]** and **[Password]**, then click **[Log in]**.


My Portfolio
[My Accounts](#)
[Transaction History](#)
[Ratings](#)

[Contact us](#)

Home
Homepage with overall statistics

Monthly trading profit
Dec Jan

Trading profit
\$0.00
January

Copied positions
0
January

Paid fees
\$0.00
January

Followers metrics
Metrics of individual subscriptions

Provider	Trading profit	Copied positions	Paid fees	Registered ↓
 proSTP #411	\$0.00	0	\$0.00	12/20/24, 8:33:48 AM

Click Provider's nickname below **[My Portfolio]**.

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Subscription Profile #411
 General information about the subscription

Monthly trading profit Dec Jan	Trading profit \$0.00 January	Copied positions 0 January
-----------------------------------	-------------------------------------	----------------------------------

Provider Filters
i

Setting up initial filters for provider's original trades

Edit

Direction All

Minimum lots -

Maximum lots -

Subscription Strategy
ii

Setting up the difference between source and copied trades

Edit

Volume scaling Autoscale

Compared values Equity

Ratio multiplier 1

Small volumes handling Skip low volumes

Correction
iii

Final processing of copies' parameters

Edit

Excess volume processing -

Risk Management
iv

Setting up the subscription's acceptable risks

Create

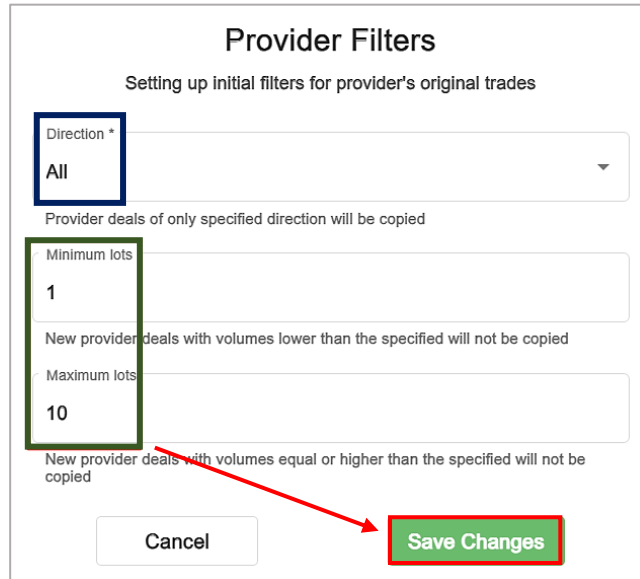
Parameter

Actions

 No rules are added

Customize **Provider Filters**, **Subscription Strategy**, **Correction**, and **Risk Management** according to your own requirements.

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i. Provider Filters

Set the **Direction**, **Minimum lots**, and **Maximum lots** for the Follower copying the Provider.

[Direction]

All: Copy all buy and sell orders.

Buy: Only copy buy orders.

Sell: Only copy sell orders.

[Minimum Lots]: Orders with a lot size **smaller than** specified lot size will not be copied.

[Maximum Lots]: Orders with a lot size **equal to or greater** specified lot size will not be copied.

After setting, click **[Save Changes]** to apply.

Here's an example of setting **[Provider Filters]** :

1. If Follower sets the direction to **[Buy]**, Follower will not copy the order when the Provider opens a Sell order.
2. If Follower sets the **[Minimum lots]** to 1 lot, Follower will not copy the order when the Provider opens 0.5 lot EURUSD.
3. If Follower sets the **[Maximum lots]** as 5 lots, Follower will not copy the order when the Provider opens 5 lots EURUSD.

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Setting up the difference between source and copied trades

Volume scaling *

Autoscale

Multiply

Fixed

Compared value *

Equity

The value to compare between the provider and follower accounts. Their ratio will be equal to the ratio of source and copied deals' volumes.

Ratio multiplier *

1

Number to multiply the Compared values' ratio by

Small volumes handling *

Skip low volumes

The system rounds volumes up, if they are close to the minimum. However significantly low volumes are skipped. Chose to copy such positions by selecting the Risk by rounding to min lot option. Please note, that the option carries a risk of increased margin usage

Cancel
Save Changes

ii. Subscription Strategy

Set the **Volume scaling**, **Compared value**, **Ratio multiplier** and **Small volumes handling**.

[Volume Scaling]

- Autoscale** : The volume of copied trades is calculated based on the ratio between the selected **[Compared value]** (Balance or Equity) of the Follower and the Provider, multiplied by the **[Ratio multiplier]**.
- Multiply** : The volume of copied trades is equal to the Provider's lot size multiplied by the **[Ratio multiplier]**.
- Fixed** : The lot size of copied trades is always fixed lot size set by Follower.

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Subscription Strategy

Setting up the difference between source and copied trades

Volume scaling *

Autoscale

Autoscale - The ratio of a copy's volume to the original volume is equal to the ratio of the follower's and provider's Compared values. The result is then multiplied by the Ratio multiplier.
 Multiply - A copy's volume is equal to the provider's original volume multiplied by the Volume multiplier.
 Fixed - Copies' volumes are always equal to the specified Copies' volumes.

Compared value *

Balance

Equity

Ratio multiplier *

1

Number to multiply the Compared values' ratio by

Small volumes handling *

Skip low volumes

The system rounds volumes up, if they are close to the minimum. However significantly low volumes are skipped. Chose to copy such positions by selecting the Risk by rounding to min lot option. Please note, that the option carries a risk of increased margin usage

Cancel **Save Changes**

[Compared value] : Uses the balance or equity of the Follower and Provider as the comparison value.

Only available when **Volume Scaling** is set to **Autoscale**.

Subscription Strategy

Setting up the difference between source and copied trades

Volume scaling *

Autoscale

Autoscale - The ratio of a copy's volume to the original volume is equal to the ratio of the follower's and provider's Compared values. The result is then multiplied by the Ratio multiplier.
 Multiply - A copy's volume is equal to the provider's original volume multiplied by the Volume multiplier.
 Fixed - Copies' volumes are always equal to the specified Copies' volumes.

Compared value *

Equity

The value to compare between the provider and follower accounts. Their ratio will be equal to the ratio of source and copied deals' volumes.

Ratio multiplier *

1

Number to multiply the Compared values' ratio by

Small volumes handling *

Skip low volumes

The system rounds volumes up, if they are close to the minimum. However significantly low volumes are skipped. Chose to copy such positions by selecting the Risk by rounding to min lot option. Please note, that the option carries a risk of increased margin usage

Cancel **Save Changes**

[Ratio Multiplier]

Balance : When **Autoscale is selected**,

Volume of copied trades = Ratio of the Follower's and Provider's balance × Ratio multiplier

Equity : When **Autoscale is selected**,

Volume of copied trades = Ratio of the Follower's and Provider's equity × Ratio multiplier

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Setting up the difference between source and copied trades

Volume scaling *

Autoscale

Autoscale - The ratio of a copy's volume to the original volume is equal to the ratio of the follower's and provider's *Compared values*. The result is then multiplied by the *Ratio multiplier*.
 Multiply - A copy's volume is equal to the provider's original volume multiplied by the *Volume multiplier*.
 Fixed - Copies' volumes are always equal to the specified *Copies' volumes*.

Compared value *

Equity

The value to compare between the provider and follower accounts. Their ratio will be equal to the ratio of source and copied deals' volumes.

Ratio multiplier *

1

Number to multiply the Compared values' ratio by

Small volumes handling *

Skip low volumes

Risk by rounding to min lot

carries a risk of increased margin usage

Cancel

Save Changes

[Small Volumes Handling]

Skip low volumes : If the trade volume is below the minimum of 0.01 lots, this order will not be copied.

Risk by rounding to min lot : If the trade volume is below the minimum of 0.01 lots, this order will be opened with 0.01 lots.

After setting, click **[Save Changes]** to apply.

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Examples of setting **[Subscription Strategy]** as shown below:

1. Subscription Strategy : Autoscale +

• Balance

Ratio Multiplier : 0.3

Follower's Balance : 1,000 USD

Provider's Balance : 10,000 USD

Follower's Copied Lots = $(1,000/10,000) * 0.3$

If Provider open 1 lot of EURUSD, the Follower will copy an order of 0.03 lot.

• Equity

Ratio Multiplier : 0.3

Follower's Equity : 2,000 USD

Provider's Equity : 10,000 USD

Follower's Copied Lots = $(2,000/10,000) * 0.3$

If Provider open 1 lot of EURUSD, the Follower will copy an order of 0.06 lot.

2. Subscription Strategy : Multiply

Ratio Multiplier : 0.3

If Provider open 1 lot of EURUSD, the Follower will copy an order of 0.3 lot.

If Provider open 5 lots of EURUSD, the Follower will copy an order of 1.5 lots.

3. Subscription Strategy : Fixed

Ratio Multiplier : 0.3

If Provider open 1 lot of EURUSD, the Follower will copy an order of 0.3 lot.

If Provider open 3.14 lots of EURUSD, the Follower will still copy an order of 0.3 lot.

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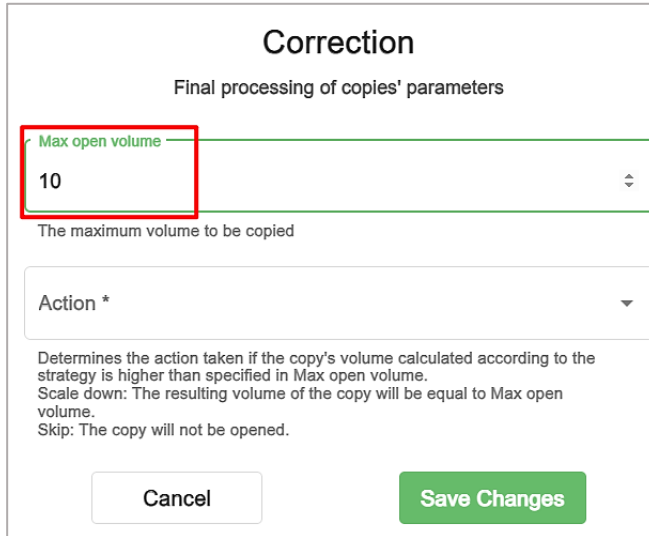
Subscription

Copy Trading Settings

Activate Subscription

Suspend or Unsubscribe

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Correction
Final processing of copies' parameters

Max open volume
10

The maximum volume to be copied

Action *

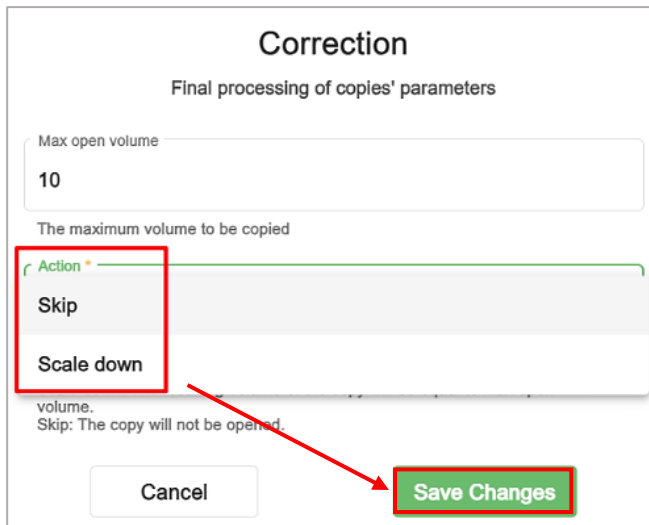
Determines the action taken if the copy's volume calculated according to the strategy is higher than specified in Max open volume.
Scale down: The resulting volume of the copy will be equal to Max open volume.
Skip: The copy will not be opened.

Cancel Save Changes

iii. Correction

Adjust the final copied trade lot size.

[Max Open Volume]: If Follower set 10 lots, means the maximum lot size to be copied is 10 lots.



Correction
Final processing of copies' parameters

Max open volume
10

The maximum volume to be copied

Action *

Skip

Scale down

volume.
Skip: The copy will not be opened.

Cancel Save Changes

[Action]

- Skip** : If the copied lot size exceed the **max open volume**, this trade will not be copied.
- Scale Down** : If the copied lot size exceeds the **max open volume**, the order will be copied using the maximum allowed lot size.

After setting, click **[Save Changes]** to apply.

Table of Contents Example of setting **[Correction]** as shown below :

Follower Registration Follower's Balance: 10,000 USD

Portal Login Provider's Balance: 10,000 USD

Subscription **1) [Subscription Strategy]**

Copy Trading Settings **Subscription Strategy** : Autoscale

Activate Subscription **Compared Value** : Balance

Ratio Multiplier : 1.5

Suspend or Unsubscribe **2) [Correction]**

Account Overview Max Open Volume: 5 lots

Action: Scale Down

If Provider open 4 lots of EURUSD, based on the Follower's **[Subscription Strategy]**, the Follower should copy 6 lots $[(10,000/10,000) * 1.5]$.

However, based on the **[Correction]** settings, the Follower will copy this order with 5 lots.

Conversely, if the Follower sets the **Action** to **Skip**, this order will not be copied.

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Risk Management

Setting up the subscription's acceptable risks

Parameter *

- Total loss
- Total profit
- Floating loss

A value that is used to compare and perform the automatic action

Subscription action *

Actions in case the specified threshold is reached.
 Keep: do not perform any action on subscription.
 Suspend: suspend subscription.
 Unsubscribe: unsubscribe from provider.

Trading action *

Actions in case the specified threshold is reached.
 Keep all: do not perform any action on copied position.
 Close all: close all copied positions.
 Close unprofitable: close copied positions one by one, starting with the most losing one, until loss level becomes lower than the threshold.
 Close all unprofitable: close all copies with loss.

Cancel
Create

iv. Risk Management

Set the **Parameters**, **Threshold**, **Subscription action** and **Trading action**.

[Parameters] :

Total loss : Total realized loss of all closed copied trades during the subscription.

Total profit : Total realized profit of all closed copied trades during the subscription.

Floating Loss : Current floating loss of all copied orders in the subscription.

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Risk Management

Setting up the subscription's acceptable risks

Parameter *

Floating loss

A measure that is compared to the level to perform the automatic action

Threshold *

1000

A value that is used to compare and perform the automatic action

Subscription action *

Keep

Suspend

Unsubscribe

Trading action *

Actions in case the specified threshold is reached.
Keep all: do not perform any action on copied position.
Close all: close all copied positions.
Close unprofitable: close copied positions one by one, starting with the most losing one, until loss level becomes lower than the threshold.
Close all unprofitable: close all copies with loss.

Cancel

Create

[Threshold] : When the parameter reaches the amount set as the follower's **threshold**, the **subscription action** will be automatically triggered.

[Subscription action]

- Keep : No subscription / unsubscription action will be performed.
- Suspend : Pause to copy new trade from the Provider.
- Unsubscribe : Unsubscribe from the Provider's offer.

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Risk Management

Setting up the subscription's acceptable risks

Parameter *

Floating loss

A measure that is compared to the level to perform the automatic action

Threshold *

1000 \$

A value that is used to compare and perform the automatic action

Subscription action *

Suspend

Actions in case the specified threshold is reached.
 Keep: do not perform any action on subscription.
 Suspend: suspend subscription.
 Unsubscribe: unsubscribe from provider.

Trading action *

Keep all
 Close all
 Close unprofitable
 Close all unprofitable

Cancel

Create

[Trading Action]

- Keep All** : Keep all open copied trades in the subscription.
- Close All** : Close all open copied trades in the subscription.
- Close Unprofitable** : Close open copied trades in the subscription one by one from highest to lowest floating loss until the floating loss falls below the threshold (applies only to the "Floating Loss" parameter).
- Close All Unprofitable** : Close all losing copied trades in the subscription.

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Examples of setting **[Risk Management]** as shown below:

Example 1 (Parameter: Total Loss)

Threshold: \$500

Subscription Action: Suspend

Trading Action: Close All

Follower has closed orders with a \$480 loss.

Later, the copied positions incur an additional loss of \$30 upon closing.

At this point, the total loss reaches \$510 and exceeds the threshold, and the system will automatically close all orders and suspend the subscription.

Example 2 (Parameter: Total Profit)

Threshold: \$1,000

Subscription Action: Unsubscribe

Trading Action: Keep All

Follower has already closed orders with a \$950 profit.

Later, the copied positions close with an additional \$60 profit.

At this point, the total profit reaches \$1,010 and exceeds the threshold, and the system will automatically retain all open trades and unsubscribe the Provider.

Since the Follower canceled the subscription, the performance fee will be settled immediately.

And also, any remaining open orders must be closed manually by the follower in MT4/MT5.

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Example 3 (Parameter: Floating Loss)

Threshold: \$1,000

Subscription Action: Keep

Trading Action: Close Unprofitable

Follower currently has 3 open copied trades:

Order A: Floating loss \$400

Order B: Floating loss \$500

Order C: Floating loss \$40

The current floating loss totals -\$940.

When the floating loss of order C increases from \$40 to \$140, causing the total floating loss to reach -\$1,040 and exceed the set threshold, the system will automatically close the open copied order with the largest floating loss in the subscription (order B) while keeping the subscription active.

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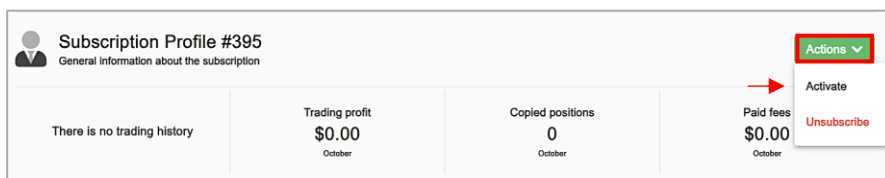
Subscription

Copy Trading Settings

Activate Subscription

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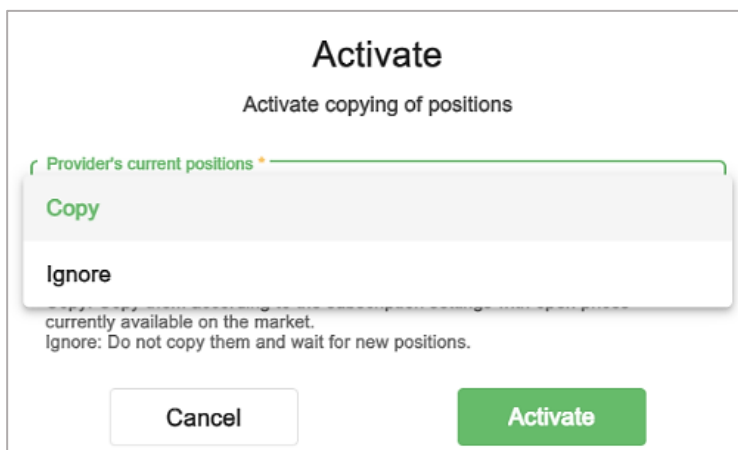


Subscription Profile #395
General information about the subscription

There is no trading history	Trading profit \$0.00 October	Copied positions 0 October	Paid fees \$0.00 October
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Actions: Activate, Unsubscribe

After completing the copy trading settings, click **[Action]** → **[Activate]** at the top-right corner of the page.



Activate
Activate copying of positions

Provider's current positions *

Copy

Ignore

currently available on the market.
Ignore: Do not copy them and wait for new positions.

Cancel Activate

Then, Follower needs to select one option and click **[Activate]** to start copy trading.

Copy: Copy the Provider's currently open orders at the current market price.

Ignore: Do not copy Provider's existing orders, only copy the new orders opened by Provider.

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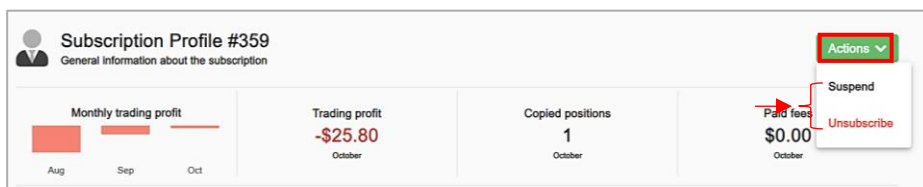
Subscription

Copy Trading Settings

Activate Subscription

**Suspend or
Unsubscribe**

Account Overview

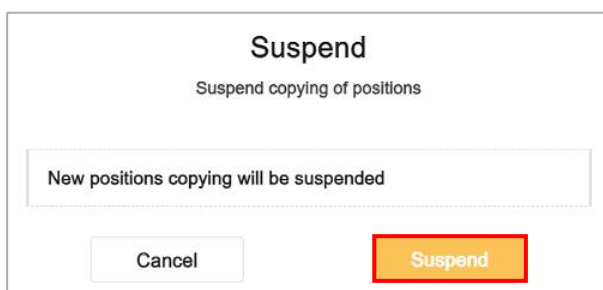


Subscription Profile #359
General information about the subscription

Monthly trading profit 	Trading profit -\$25.80 October	Copied positions 1 October	Paid fees \$0.00 October
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Actions ▼
 Suspend
 Unsubscribe

After logging in and clicking the Provider's nickname, click **[Action]** → **[Suspend]** or **[Unsubscribe]**.



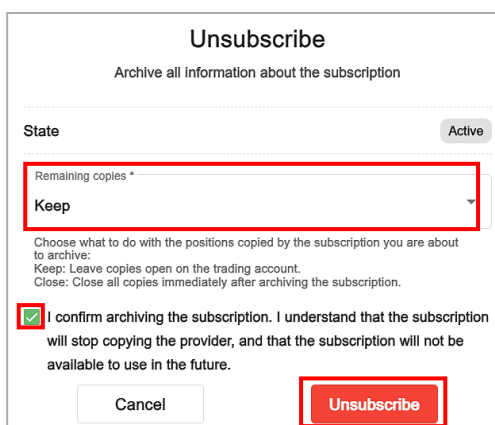
Suspend
Suspend copying of positions

New positions copying will be suspended

Cancel **Suspend**

If choose **[Suspend]**, the Follower must click **[Suspend]** again to confirm.

Please note that new orders will not be copied, but the current opening copied orders will continue to follow the Provider's signal.



Unsubscribe
Archive all information about the subscription

State **Active**

Remaining copies *
Keep

Choose what to do with the positions copied by the subscription you are about to archive:
 Keep: Leave copies open on the trading account.
 Close: Close all copies immediately after archiving the subscription.

☒ I confirm archiving the subscription. I understand that the subscription will stop copying the provider, and that the subscription will not be available to use in the future.

Cancel **Unsubscribe**

If **[Unsubscribe]** is selected, the Follower needs to select one option from **[Remaining copies]**, check **[I confirm...]**, and lastly click **[Unsubscribe]**.

Keep : Keep the copied trades open. Follower must manually close the orders in MT4 / MT5.

Close : Close all currently open copied trades.

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Positions & Deals

Fees

Positions

Deals

Fees

Filters

Refresh

Position	Source	Status	Symbol	Open time ↓	Volume	Profit	Close time
8187881 #25208 Processed	8187880	Copied	EURUSD	10/25/24, 11:20:19 AM	0.03	-\$9.67	10/28/24, 11:09:51 AM >>
6796337 #22969 Processed	6796336	Copied	EURUSD	9/11/24, 12:38:29 PM	0.01	\$0.43	9/11/24, 12:59:07 PM >>
6796315 #22956 Processed	6796314	Copied	EURUSD	9/11/24, 12:36:56 PM	6.52	\$26.08	9/11/24, 12:37:36 PM >>
6796225 #22928 Processed	6796224	Copied	EURUSD	9/11/24, 12:31:22 PM	3.03	-\$109.08	9/11/24, 12:35:09 PM >>
6461222 #21637 Processed	6461221	Copied	XAUUSD	8/28/24, 12:19:39 PM	3.26	-\$3,103.52	8/28/24, 3:03:34 PM >>

Items per page: 5

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< >

After logging in and clicking the Provider’s nickname, scroll to the bottom of the page to view copied trades and performance fee payment history.

Click any order number to view the detailed information of that order, as shown below.

 Position #25208 Information about the position	
Common Information Common position's information	
MetaTrader position ID	8187881
State	Processed
Status	Copied
Untrack status	Closed
Opening Data Position's opening data	
Symbol	EURUSD
Direction	Buy
Open volume	0.03
Open price	1.08371
Open time	10/25/24, 11:20:19 AM
STATUS	
State	Processed
Status	Copied
TRADING ACCOUNT	
MT name	
MT login	4042251
State	Active
SUBSCRIPTION	
Subscription	Subscription #353
State	Active
Updated (UTC)	October 28, 2024 at 8:16:17 AM

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Positions	Deals	Fees
Filters		Refresh
Fee ↓	MT order	Amount
Performance fee #4014 Processed	6452980	\$818.32
Performance fee #4002 Processed	6450381	\$136.90
Performance fee #3990 Processed	6450094	\$32.40
Performance fee #3978 Processed	6449791	\$21.21
Performance fee #3966 Processed	6448512	\$22.36
		Processed
		8/28/24, 8:45:53 AM
		8/28/24, 6:40:52 AM
		8/28/24, 6:24:52 AM
		8/28/24, 6:13:13 AM
		8/28/24, 5:34:15 AM
		Items per page: 5 1 - 5 of 15

To view records of performance fees, click **[Fees]** and then

Click on any record to see the details.

Transaction

Information about the transaction

State

Processed

Trading account

4042251

MT order

6452980

Requested amount

\$818.32

Balance

Processed amount

\$818.32

Balance

Reason

Performance fee

Sender

Subscription #353

#4042251

Recipient

proSTP

Processed

8/28/24, 8:45:53 AM

Cancel