InvestOps Trade Plan

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| **Title & Date** | *A brief description of the view.* | | | | *Creation date.* | | |
| **Strategy** | *A brief description of the trade strategy.* | | | | | | |
| **Return Analysis** | *Capital at risk.* | *Maximum potential gain.* | | | *Expected return.* | | |
|  | *The positions to trade.* | | | | | | |
| **Entry Plan** | **Security** | | **Side** | | | **Quantity** | **Price** |
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| **Portfolio Impact** | *Analysis of portfolio adjustments required to support this investment.* | | | | | | |
| **Time Horizon** | *The expected duration or exit date of the trade.* | | | | | | |
| **Successful Exit Criteria** | *Criteria for a successful exit.* | | | | | | |
| **Failure Exit Criteria** | *Criteria to abandon investment.* | | | | | | |
| **Adjustment Plan** | *Planned or potential adjustments.* | | | | | | |
| **Downside Protection** | *Mitigation plans for downside risk.* | | | | | | |
| Stop order at | | | Inherently hedged | | | |
| Hedged via other portfolio positions | | | Hedged with options | | | |
| Intentionally not hedged | | | Other: | | | |
| **Rejected Alternatives** | *Rejected alternative strategies.* | | | | | | |