

MODULE 1 — DECISION FRAMING DOCUMENT SCORING RUBRIC

Formal Review

Overall Verdict (Up Front)

Current Level: Strong Intermediate → Approaching Advanced

Overall Score: 78 / 100

Portfolio Readiness: *Almost*, with targeted refinements required

This is not cosmetic feedback. The gaps are **strategic clarity and completeness**, not competence.

SCORING RUBRIC & FEEDBACK

1. Business Context

Score: 17 / 20

What You Did Well

- Clear system description (EA, MT5, synthetic indices)
- Correct distinction between *scalping* vs *trend following*
- Identified exploratory vs sustainability phase
- Correctly surfaced Step Indexes as an emergent candidate asset class

This paragraph already reads like internal fintech documentation.

Where It Can Improve

- The **business objective** is implied, not explicit
- “Daily cash flow” and “long-term capital deployment” are both mentioned but not reconciled

Guided Improvement

Add **one explicit sentence** answering:

What business outcome is ultimately being optimized?

Example improvement:

“The primary business objective is to determine whether the EA can deliver repeatable, risk-controlled daily profits suitable for sustained capital allocation rather than short-term exploratory gains.”

This clarifies *intent*, not mechanics.

2. Decision Owner

Score: 8 / 10

What You Did Well

- Clearly named role
- Ownership is explicit and accountable

Where It Can Improve

- Slightly abstract; could be grounded in *decision consequence*

Guided Improvement

Add **one consequence-oriented clause**:

“The Algorithmic Strategy Manager responsible for capital allocation, risk parameter configuration, and bearing downside exposure from deployment decisions.”

This reinforces accountability.

3. Decision Statement

Score: 14 / 20

This is the **most important section**, and also the most improvable.

What You Did Well

- Explicit “Should we...” framing
- Clear trade-off: drawdown vs aggressive growth
- References evidence types (risk-adjusted metrics, drawdown)

Where It Falls Short

- The decision statement is **overloaded**
- It includes *policy*, *constraints*, *metrics*, and *strategy* all at once

- “Aggressive (5%) daily growth targets” is ambiguous (growth vs risk per trade)

Guided Improvement (Very Important)

A decision statement must be **singular and crisp**.

Refactor into:

- One core decision
- Move constraints to criteria

Suggested Rewrite (Model Example):

“Should the EA be formally restricted to trading Step Indexes only as its production configuration, based on comparative drawdown and risk-adjusted performance relative to other synthetic instruments?”

Then:

- 5% risk
- Daily targets
→ belong in **Decision Criteria**, not the decision itself

This change alone would move this section to **18–19/20**.

4. Available Options

Score: 9 / 15

What You Did Well

- Options are realistic and implementable
- No “fantasy” solutions

Where It Falls Short

- Options are **partial parameter tweaks**, not strategic alternatives
- Missing a “do nothing / pause” option
- Options are not mutually exclusive

Guided Improvement

Reframe options as **distinct paths**:

Example:

- Continue current multi-asset configuration

- Restrict trading to Step Indexes only
- Restrict Step Indexes + reduce trade frequency
- Pause live trading and extend observation window

Options should represent **choices**, not knobs.

5. Decision Criteria

Score: 7 / 15

This is your **second biggest gap**.

What You Did Well

- Correct focus on drawdown and consistency

Where It Falls Short

- Too vague
- Not measurable
- Missing risk-adjusted perspective

Guided Improvement

Each criterion should be:

- Observable
- Comparable
- Decision-enabling

Example rewrite:

- Maximum daily drawdown below X%
- Consistent positive expectancy over N days
- No margin call risk under worst observed drawdown
- Profit variance within acceptable band

Think: *“Could two people apply these criteria and reach the same conclusion?”*

6. Assumptions

Score: 6 / 10

What You Did Well

- Identified system-behaviour assumptions
- Recognized SL padding risk

Where It Can Improve

- Assumptions mix **technical behaviour** and **market behaviour**
- Some are closer to risks than assumptions

Guided Improvement

Label assumptions explicitly:

- System assumptions
- Market assumptions

This improves analytical hygiene.

7. Constraints

Score: 7 / 10

What You Did Well

- Correctly identified capital and broker constraints
- Psychological tolerance inclusion shows maturity

Where It Can Improve

- Capital size is unspecified
- Constraints could be more concrete

Guided Improvement

Add specificity where possible:

“Initial deployable capital size below \$X limits drawdown tolerance.”

Precision strengthens decision defensibility.

8. Decision Risks

Score: 18 / 20

This is one of your **strongest sections**.

What You Did Well

- Excellent identification of:
 - Short evaluation window
 - Demo vs live distortion
 - Overfitting
 - Execution risk
- Language is professional and accurate
- Risks are framed causally, not emotionally

This section is **portfolio-ready as-is**.

9. Data Required

Score: 13 / 15

What You Did Well

- Correct dataset focus
- Clear operational relevance
- Excellent inclusion of trade duration diagnostic

Where It Can Improve

- Minor formatting consistency
- Could group data by analytical purpose

Guided Improvement

Group into:

- Performance
- Risk
- Behavioural diagnostics

This improves readability but is not critical.

SUMMARY SCORECARD

Section	Score
Business Context	17 / 20
Decision Owner	8 / 10
Decision Statement	14 / 20

Section	Score
Available Options	9 / 15
Decision Criteria	7 / 15
Assumptions	6 / 10
Constraints	7 / 10
Decision Risks	18 / 20
Data Required	13 / 15
TOTAL	78 / 100

WHAT THIS MEANS

- You are **thinking like a decision analyst**
 - The weaknesses are *structural*, not conceptual
 - With one focused revision pass, this becomes **portfolio-grade**
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REQUIRED NEXT STEP (Before Module 2)

Revise **only** these sections:

1. Decision Statement
2. Available Options
3. Decision Criteria

Do **not** rewrite everything.

You are progressing exactly as intended.