

News Trader - User Manual

CloudStack Networks Trading Platform

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Getting Started

Login

1. Navigate to: <https://trader.cloudstacknetworks.com>
2. Enter your email and password
3. Click **Sign In**

First Time Setup

After logging in for the first time, you should:

1. **Configure Alpaca API Keys** (Dashboard → Settings)
 - Get your API keys from <https://alpaca.markets>
 - Use Paper Trading keys for testing
 - Click "Test Connection" to verify
 2. **Verify Account Settings** (Dashboard → Settings)
 - Starting Capital: Default \$100,000
 - Max Positions: Default 10
 - Trailing Stop: Default 15%
 - Paper Trading: Enabled by default
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Dashboard Overview

The main dashboard provides a quick snapshot of your trading activity:

Key Metrics

- **Account Value:** Total portfolio value
- **Cash Balance:** Available cash for new positions
- **Total P&L:** Profit/Loss (\$ and %)
- **Open Positions:** Number of active trades

Performance Chart

- Visual representation of portfolio value over time
- Hover over points to see specific values

Quick Views

- **Open Positions:** Your current holdings
 - **Watchlist Preview:** Top-rated stocks
 - **Recent Trades:** Latest completed trades
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Market Search & Stock Discovery

Location: Dashboard → Market

Searching for Stocks

1. **Basic Search**
 - Type ticker symbol (e.g., "AAPL") or company name (e.g., "Apple")
 - Press Enter or click Search
 - Results show up to 20 stocks
2. **Filter by Exchange**
 - Click the Exchange dropdown
 - Select: NASDAQ, NYSE, AMEX, or "All Exchanges"
 - Useful for focusing on major exchanges

Stock Details

Click any stock to view comprehensive information:

Company Information

- Company Name & Industry
- Country & Exchange
- Market Capitalization

Price Overview

- Current Price
- Previous Close
- 24h Change (\$ and %)
- Volume
- 52-Week High/Low

Valuation Metrics

- P/E Ratio (Price-to-Earnings)
- P/S Ratio (Price-to-Sales)
- P/B Ratio (Price-to-Book)
- P/CF Ratio (Price-to-Cash-Flow)

Financial Health

- ROE (Return on Equity)
- Debt-to-Equity Ratio
- Current Ratio

Growth & Income

- Revenue Growth
- Earnings Growth
- Dividend Yield

Momentum & Technicals

- 3-Month Momentum
- 6-Month Price Trend Chart

Example: Finding Quality Tech Stocks

Goal: Find profitable tech companies with reasonable valuations

1. Go to **Market**
 2. Filter by **NASDAQ** exchange
 3. Search “Technology” or browse results
 4. Click stocks to view details
 5. Look for:
 - P/E < 25 (reasonable valuation)
 - ROE > 15% (profitability)
 - Positive momentum
 6. Add promising stocks to watchlist
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Screening Strategies

Location: Dashboard → Screens

Screens are automated filters that identify stocks matching specific criteria.

Types of Screens

1. O'Shaughnessy Screens (Traditional Value)

Focus on fundamental quality metrics:

- Valuation (P/E, P/S, P/B ratios)
- Financial Health (ROE, Debt)
- Growth (Revenue, Earnings)
- Market metrics (Market Cap, Volume)

2. Earnings Screens (Event-Driven)

Focus on stocks with upcoming earnings that beat expectations:

- Pre-filtered by quality criteria
- Monitors specific stocks
- Trades only on earnings beats

Creating a New O'Shaughnessy Screen

Example: Small Cap Value Screen

1. Click "+ Create New Screen"
2. **Name:** "Small Cap Value"
3. **Description:** "Undervalued small caps with solid fundamentals"
4. **Screen Type:** O'Shaughnessy
5. Set criteria:

Valuation:

- Min P/E: 5
- Max P/E: 15
- Max P/S: 2

Financial Health:

- Min ROE: 10%
- Max Debt-to-Equity: 1.0

Market:

- Min Market Cap: \$50M
- Max Market Cap: \$2B
- Min Volume: 100,000

1. Click "Create Screen"
2. Click "Run Screen Now" to populate results

Editing & Managing Screens

- **Edit:** Click pencil icon to modify criteria
- **Clone:** Copy screen to create variations
- **Delete:** Remove screens (only if no watchlist items)
- **Run Manually:** Click play icon to refresh results

Earnings Calendar & Monitoring

Location: Dashboard → Earnings Calendar

This feature allows you to trade stocks based on earnings beats.

Understanding the Earnings Calendar

The calendar shows upcoming earnings reports for the next 30 days:

- **Date:** When earnings will be reported
- **Symbol:** Stock ticker
- **Quarter:** Fiscal quarter (e.g., Q3 2025)

- **Estimated EPS:** Analyst consensus
- **Actual EPS:** Reported earnings (after announcement)
- **Surprise %:** How much actual beat/missed estimates

Workflow: Creating an Earnings Monitor

Example: Monitoring Quality Retailers for Earnings Beats

Step 1: Filter the Calendar

1. Go to **Earnings Calendar**
2. Click “**Show Filters**” button
3. Set quality criteria:

...

Valuation:

- Max P/E: 15

Financial Health:

- Min ROE: 15%
- Max Debt-to-Equity: 0.5

Market:

- Min Market Cap: \$5B (large caps only)

...

1. Click “**Apply Filters**”
2. **Result:** See 52 stocks reporting earnings that meet your criteria

Step 2: Select Specific Stocks

1. Review the filtered list
2. **Manual Curation:** Check boxes next to stocks you like
 - Example: Check TGT, WMT, COST, LOW, HD (retail stocks)
 - Skip stocks you don't trust (even if they match filters)
3. Use “**Select All**” or “**Clear Selection**” for bulk actions
4. **Status:** Shows “5 of 52 selected”

Step 3: Create the Earnings Monitor

1. Click “**Create Earnings Monitor (5 stocks)**”
2. Dialog opens:
 - **Monitor Name:** “Quality Retail Earnings”
 - **Min Earnings Surprise:** 5% (only trade if they beat by 5%+)
3. Review: “This will monitor 5 specific stocks: TGT, WMT, COST, LOW, HD”
4. Click “**Create Monitor**”

Step 4: Paper Trade It

1. Go to **Paper Trading Lab**
2. Click “**Create New Run**”
3. Configure:
 - **Run Name:** “Retail Earnings Test”
 - **Screen:** Select “Quality Retail Earnings”
 - **Run Type:** Live

- **Starting Capital:** \$100,000

- **Max Positions:** 5

4. Click “**Start Run**”

What Happens Automatically

The system monitors your selected stocks:

Nov 20: TGT reports, beats by 7.2%
 → Automatic BUY (meets 5% threshold)

Nov 21: MSFT reports, beats by 9%
 → SKIPPED (not in your monitored list)

Nov 22: WMT reports, beats by 3%
 → SKIPPED (below 5% threshold)

Nov 23: COST reports, beats by 8.5%
 → Automatic BUY (meets threshold)

Filtering Options Explained

Apply Existing Screen (Future Feature)

- Dropdown showing all saved screens
- Apply O’Shaughnessy criteria to earnings calendar
- Quick way to reuse proven filters

Custom Filters (Current)

- Ad-hoc filtering without saving
- Experiment with different criteria
- Option to “Save as Screen” if you like results

Paper Trading Lab

Location: Dashboard → Paper Trading

Test trading strategies with historical or real-time data without risking real money.

Creating a Paper Trading Run

Example: Testing a Large Cap Value Strategy

Step 1: Create or Select a Screen

1. Go to **Screens**
2. Use existing screen or create new one
3. Example: “Large Cap Value”

Step 2: Configure the Run

1. Go to **Paper Trading Lab**
2. Click “**Create New Run**”
3. Fill in details:

Run Name: "Large Cap Q4 2025"
 Screen: "Large Cap Value"
 Run Type: Historical (for immediate results)
 Start Date: Oct 1, 2025
 End Date: Nov 18, 2025
 Starting Capital: \$100,000
 Max Positions: 10
 Trailing Stop: 15%

1. Click "**Start Run**"

Step 3: View Results

After run completes (instant for historical):

Performance Metrics:

- Total Return: \$8,450 (8.45%)
- Win Rate: 65%
- Sharpe Ratio: 1.8
- Max Drawdown: -5.2%
- Profit Factor: 2.1
- Avg Hold Time: 12 days

Trade History:

Symbol Entry Exit Days P&L Reason
----- ----- ----- ----- ----- -----
AAPL \$150 \$162 14 +\$1,200 Trailing Stop
TGT \$120 \$115 8 -\$500 Stop Loss
WMT \$145 \$155 18 +\$2,100 Trailing Stop

Run Types

Historical Backtest

- Tests strategy on past data
- Completes instantly
- Good for validating strategy
- Shows what would have happened

Live Paper Trading

- Runs in real-time
- Executes trades as opportunities arise
- Can run for days/weeks/months
- Can be stopped anytime

Managing Runs

View Details

- Click eye icon to see full analysis
- Review all trades
- Analyze performance metrics

Stop Run

- Click stop button for live runs

- Calculates final metrics
- Preserves trade history

Delete Run

- Removes run and all trade data
- Cannot be undone

Comparing Strategies

Example: Value vs Growth

1. Create Run 1: "Value Strategy" (low P/E, high ROE)
 2. Create Run 2: "Growth Strategy" (high earnings growth)
 3. Run both for same time period
 4. Compare:
 - Which has higher return?
 - Which has better win rate?
 - Which has lower drawdown?
 5. Choose winner for live trading
-

Backtesting

Location: Dashboard → Backtesting

Test O'Shaughnessy strategies on historical data to validate performance.

Running a Backtest

Example: Testing Small Cap Value Strategy

Step 1: Configure Test

1. Go to **Backtesting**
2. Select parameters:

Screen: "Small Cap Value"
Date Range: Jan 1, 2025 - Nov 18, 2025
Starting Capital: \$100,000
Max Positions: 10
Trailing Stop: 15%
3. Click "**Run Backtest**"

Step 2: Review Results

Performance Summary:

- Total Return: 18.5%
- Win Rate: 62%
- Total Trades: 45
- Winning: 28
- Losing: 17
- Sharpe Ratio: 1.65
- Max Drawdown: -8.2%

Portfolio Value Chart:

- Daily portfolio value over time
- Compare to benchmark (S&P 500)

Trade History:

- Every trade executed
- Entry/exit dates and prices
- P&L for each trade
- Days held
- Exit reason

Understanding the Strategy

The backtest simulates this daily workflow:

1. **Screen Stocks:** Apply O'Shaughnessy criteria
2. **Filter for Momentum:** Keep only stocks with positive 3M momentum
3. **Enter Positions:** Buy top-ranked stocks (up to max positions)
4. **Set Trailing Stops:** Protect gains
5. **Monitor Daily:** Check for exit signals
6. **Exit When:**
 - Trailing stop hit
 - Momentum turns negative
 - 30 days holding period

Important Notes

Limitations:

- Uses 3M momentum as proxy for positive news
- Historical news data not available
- Results approximate real strategy

Uses Real Data:

- Historical stock prices
- Real fundamental metrics
- Actual market conditions

Watchlist Management

Location: Dashboard → Watchlist

Your watchlist contains stocks that passed screening criteria.

Understanding Watchlist Entries

Each stock shows:

- **Ticker & Company Name**
- **Score:** Algorithmic ranking (higher = better)
- **Price & Market Cap**
- **Key Ratios:** P/E, P/S
- **Momentum:** 3-month performance
- **Sentiment:** News sentiment score

- **Earnings Date:** Next earnings report
- **Screen:** Which screen added it

Filtering

- **By Screen:** Show stocks from specific strategy
- **By Ticker:** Search for specific stock

Actions

- **View Details:** Click stock to see full information
 - **Remove:** Delete from watchlist
-

Positions & Trades

Open Positions

Location: Dashboard → Positions

View all currently held stocks:

Summary Stats:

- Total Open Positions
- Total Position Value
- Unrealized P&L (total)
- Win Rate (% winning)

Position Details:

- Ticker
- Quantity
- Entry Price
- Current Price
- Unrealized P&L
- Trailing Stop Price
- Time Held

Actions:

- **Close Position:** Manually exit (overrides automation)

Trade History

Location: Dashboard → Trades

Review all completed trades:

Performance Stats:

- Total Trades
- Total P&L
- Win Rate
- Average Hold Time

Filters:

- Search by ticker
- Filter by result (winning/losing/open)

Trade Details:

- Ticker
 - Quantity
 - Entry/Exit Prices
 - P&L (\$ and %)
 - Days Held
 - Exit Reason (Trailing Stop, Manual, Stop Loss, etc.)
-

Settings & Configuration

Location: Dashboard → Settings

Appearance & Theme

Changing Color Theme (Light/Dark Mode):

The News Trader platform supports both light and dark color themes to match your preference and reduce eye strain.

To Switch Themes:

1. Look at the **top-right corner** of any dashboard page
2. Find the **sun/moon icon** button (next to your name)
3. Click the icon to toggle between themes:
 -  **Sun icon** = Currently in light mode (click to switch to dark)
 -  **Moon icon** = Currently in dark mode (click to switch to light)

Theme Persists:

- Your theme choice is saved automatically
- Applies across all pages
- Remembers your preference on next login

Light Mode:

- White backgrounds
- Dark text
- Best for bright environments
- Reduces battery usage on LCD screens

Dark Mode:

- Dark backgrounds
 - Light text
 - Reduces eye strain in low-light conditions
 - Better for OLED screens (saves battery)
 - Preferred by many traders for extended sessions
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Trading Account Settings

Capital & Risk:

- **Starting Capital:** Initial account balance
- **Max Positions:** Max simultaneous holdings
- **Trailing Stop %:** Automatic stop loss percentage

Mode:

- **Paper Trading:** Toggle on/off (keep ON for testing)

API Configuration

Alpaca Integration:

1. Get API keys from <https://alpaca.markets>
2. For testing: Use **Paper Trading** keys
3. Enter:
 - API Key ID
 - Secret Key
4. Toggle “**Use Paper Trading**” (recommended)
5. Click “**Test Connection**”
6. If successful, click “**Save Settings**”

Screening Criteria

Configure default O’Shaughnessy parameters:

- Valuation thresholds
- Financial health minimums
- Growth requirements
- Market cap ranges

Common Workflows

Workflow 1: Finding Undervalued Dividend Stocks

Goal: Find profitable companies with good dividends

1. Create Screen (Screens page)

```
Name: "Dividend Value"
Max P/E: 15
Min ROE: 10%
Min Dividend Yield: 3%
Min Market Cap: $1B
```

2. Run Screen → Populates watchlist**3. Review Watchlist** → Check top stocks**4. Research Stocks** (Market page)

- Click each ticker
- Review fundamentals
- Check news

5. Paper Trade (Paper Trading Lab)

- Create new run
- Select “Dividend Value” screen
- Run historical test first
- If good results, run live

Workflow 2: Earnings Event Trading

Goal: Trade quality stocks that beat earnings

1. Review Earnings Calendar

- See who's reporting this week

2. Apply Quality Filters

Max P/E: 20

Min ROE: 15%

Min Market Cap: \$5B

3. Hand-Pick Stocks

- Select 5-10 you trust
- Check their boxes

4. Create Earnings Monitor

Name: "Tech Earnings Nov"

Min Surprise: 5%

Selected: AAPL, MSFT, GOOGL, META, NVDA

5. Paper Trade Live

- System auto-trades beats
- Review results weekly

Workflow 3: Strategy Validation

Goal: Test before going live

1. Create Strategy (Screens)

- Define your criteria

2. Backtest (Backtesting page)

- Test on 6+ months of data
- Check win rate > 55%
- Verify positive Sharpe ratio

3. Paper Trade Historical (Paper Trading Lab)

- Test last 2 months
- Verify consistent results

4. Paper Trade Live (Paper Trading Lab)

- Run for 2-4 weeks
- Monitor daily
- Check performance

5. Go Live (Settings)

- If paper trading successful
- Switch to live API keys
- Start small (reduce capital)

Tips & Best Practices

Screening Strategies

DO:

- Start with conservative filters (broader universe)
- Test multiple variations
- Run screens daily to catch new opportunities
- Focus on 2-3 quality metrics rather than 20

DON'T:

- Use extremely tight filters (0 results)
- Create 20+ screens (hard to manage)
- Forget to refresh regularly
- Ignore data quality scores

Earnings Trading

DO:

- Pre-filter by quality before earnings
- Manually curate your monitored list
- Set realistic min surprise (5-10%)
- Limit to stocks you understand

DON'T:

- Monitor 100+ stocks (unfocused)
- Trade every earnings beat (quality matters)
- Ignore the underlying business
- Skip the filtering step

Paper Trading

DO:

- Test every strategy before going live
- Run historical tests first (fast validation)
- Compare multiple strategies
- Track why trades win/lose

DON'T:

- Skip testing (costly mistakes)
- Use tiny sample sizes (< 20 trades)
- Ignore max drawdown
- Trust strategies with < 55% win rate

Risk Management

DO:

- Use trailing stops (15% is good start)
- Limit max positions (diversification)
- Start with small capital when going live
- Review trades weekly

DON'T:

- Remove stop losses (always use them)

- Put 100% in one stock
 - Go live with full capital immediately
 - Ignore losing trades (learn from them)
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Troubleshooting

Issue: No stocks in watchlist after running screen

Solutions:

1. Check screen criteria (too restrictive?)
2. Verify stock data is loaded:
 - Go to Market page
 - Check data refresh status
3. Try broader filters
4. Click “Run Screen Now” button

Issue: Market search returns no results

Possible Causes:

- Stock data download incomplete
- Ticker not in database (check spelling)

Solutions:

1. Check data refresh status (Dashboard → Market)
2. Search by company name instead of ticker
3. Try different exchange filter
4. Wait for initial data download (2-4 hours first time)

Issue: Alpaca connection test fails

Solutions:

1. Verify API keys (no extra spaces)
2. Check “Use Paper Trading” toggle
3. Ensure keys are from Paper Trading section (not Live)
4. Verify Alpaca account is active

Issue: Earnings calendar is empty

Solutions:

1. Run earnings fetch script (admin access required)
2. Wait - automatically updates daily at 2 AM
3. Check date range (next 30 days only)

Issue: Backtest shows no trades

Possible Causes:

- No stock data for date range
- Filters too restrictive
- No stocks with positive momentum

Solutions:

1. Use more recent dates (2025)

2. Broaden screen criteria
 3. Check screen has some watchlist stocks
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Appendix A: Metric Definitions

Valuation Metrics

P/E Ratio (Price-to-Earnings)

- Price ÷ Annual Earnings
- Lower = Cheaper
- Typical range: 10-25
- < 15 = Value, > 25 = Growth/Overvalued

P/S Ratio (Price-to-Sales)

- Price ÷ Annual Revenue
- Good for unprofitable companies
- < 2 = Reasonable

P/B Ratio (Price-to-Book)

- Price ÷ Book Value
- < 1 = Trading below asset value
- Useful for banks, real estate

P/CF Ratio (Price-to-Cash-Flow)

- Price ÷ Operating Cash Flow
- Harder to manipulate than earnings
- < 15 = Reasonable

Financial Health

ROE (Return on Equity)

- Net Income ÷ Shareholder Equity
- % return on invested capital
- > 15% = Strong profitability

Debt-to-Equity

- Total Debt ÷ Total Equity
- < 0.5 = Conservative
- < 1.0 = Reasonable
- > 2.0 = High leverage risk

Current Ratio

- Current Assets ÷ Current Liabilities
- > 1.5 = Healthy liquidity
- < 1.0 = Potential cash problems

Growth Metrics

Revenue Growth

- Year-over-year revenue increase
- > 10% = Strong growth
- Negative = Shrinking business

Earnings Growth

- Year-over-year earnings increase
- > 15% = Excellent
- Should exceed revenue growth

Performance Metrics

Sharpe Ratio

- Risk-adjusted returns
- $(\text{Return} - \text{Risk-Free Rate}) \div \text{Volatility}$
- > 1.0 = Good
- > 2.0 = Excellent

Max Drawdown

- Largest peak-to-trough decline
- -10% = Manageable
- -20%+ = High risk

Win Rate

- % of profitable trades
- > 55% = Good
- > 60% = Excellent

Profit Factor

- Gross Profit ÷ Gross Loss
 - > 1.5 = Good
 - > 2.0 = Excellent
-

Appendix B: Quick Reference

Keyboard Shortcuts

None currently implemented.

Status Indicators

Badges:

- Active = Screen is running
- Inactive = Screen is paused
- Earnings = Earnings-based strategy
- O'Shaughnessy = Traditional value strategy

Trade Exit Reasons:

- TRAILING_STOP = Profit target hit
 - STOP_LOSS = Loss limit hit
 - MANUAL = User closed position
 - MOMENTUM_LOSS = Stock momentum turned negative
 - TIME_CUTOFF = Max holding period reached
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Updates & Version History

Version 1.0 - November 18, 2025

- Initial release
- O'Shaughnessy screening
- Earnings calendar monitoring
- Paper Trading Lab
- Backtesting engine
- Stock selection with checkboxes
- Manual stock curation for earnings

Planned Features:

- Tabs UI for applying existing screens to earnings
 - Save custom filters as screens directly from earnings page
 - Mobile app
 - Advanced charting
 - Portfolio optimizer
 - Real-time alerts
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Support

Issues & Questions:

- Email: support@cloudstacknetworks.com
- User Guide: Available in the platform under Dashboard → User Guide

Resources:

- O'Shaughnessy: "What Works on Wall Street"
 - Alpaca Docs: <https://alpaca.markets/docs>
 - Finnhub Docs: <https://finnhub.io/docs/api>
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This manual is maintained as features are added and updated.