



# The AltVest Handbook

# A Modern

# Trading

# Framework

# for the AI Era

For educational purposes only. Not financial advice.

# Introduction

AltVest is a structured, narrative-driven trading system designed for markets shaped by AI infrastructure, energy constraints, automation cycles, and macro flows.

In an era where artificial intelligence is fundamentally reshaping capital allocation and market dynamics, traders need frameworks that reflect this new reality.

The goal of this handbook is simple: give you a complete, modern, repeatable trading process that removes noise and adds clarity.

This isn't theory—it's a battle-tested approach to navigating the most significant technological transformation in financial markets since the internet era.

This is how traders operate with confidence, not emotion. When you have a systematic approach grounded in the fundamental forces driving markets, you trade with conviction rather than hope.

This handbook is for educational and informational purposes only. It does not constitute financial advice, investment advice, trading advice, or any recommendation. AltVest is not an investment advisor. Trading involves risk, including total loss. Past performance is not necessarily indicative of future results.



**Structure**



**Narrative**



**Macro Alignment**



**Clean Charting**



**Asymmetry**



**Discipline**

# The Purpose of AltVest

Trading today isn't about predicting every candle. It's about aligning with the fundamental forces driving capital flows in an AI-transformed landscape. The markets are undergoing a structural shift as profound as the industrial revolution, and traditional trading frameworks fail to capture these dynamics.

## AI Compute Demand

Insatiable demand for processing power driving trillion-dollar infrastructure buildouts

## Data Center Expansion

Unprecedented construction cycles to support AI workloads and cloud services

## Power Constraints

Energy availability becoming the primary bottleneck for AI infrastructure growth

## Automation & Robotics

Accelerating adoption across logistics, manufacturing, and industrial operations

## Institutional Narratives

Capital flows following dominant themes as institutions reposition portfolios

## Liquidity Cycles

Understanding when capital is expanding or contracting across risk assets

Most traders use outdated systems. AltVest gives you one built for the world we actually trade in.

# The Three-Bucket Portfolio

AltVest organizes positions into a simple, intentional portfolio framework based on the AI cycle. Rather than random exposure across disconnected names, this structure ensures every position has a clear role and narrative alignment. Think of it as a balanced capital allocation model that captures different risk-return profiles across the AI infrastructure stack.

## Compute (Anchor)

**The foundation of AI growth:** cloud platforms, compute infrastructure, hyperscalers.

Stable, durable, multi-quarter exposure. These names provide portfolio ballast with lower volatility while maintaining upside participation. They're the core holdings that anchor your book.

## Power & Infrastructure (High Beta)

**The bottleneck:** energy generation, cooling systems, hardware providers, servers, racks, data center construction and systems.

This bucket delivers torque. These names move violently in both directions but capture the most acute supply-demand imbalances. Higher risk, higher reward when timing aligns.

## Automation & Robotics (Rerate)

**The adoption layer:** warehouse automation, industrial robotics, logistics optimization, manufacturing automation solutions.

These names rerate sharply as adoption accelerates and revenue visibility improves. Entry timing matters—wait for the inflection, then ride the multiple expansion.

- ❑ **Purpose:** Every position has a clear role, not random exposure. This framework prevents portfolio drift and maintains intentional risk allocation.

# The AltVest Chart System

**Clarity comes from simplicity.**

**AltVest uses only three chart elements. This isn't about being minimalist for aesthetics—it's about signal-to-noise optimization. Every indicator you add increases the chance of conflicting signals and decision paralysis.**

**The three elements below capture everything you need: where smart money is positioned, whether the trend has integrity, and the precise structural levels that matter for entries and exits.**

**No RSI. No MACD. No clouds. No clutter.**

1

## VWAP

**Volume-Weighted Average Price.** Shows where real buyers and sellers are positioned throughout the session. This is your primary flow anchor—institutional desks use VWAP for execution benchmarks.

2

## EMA20

**Short-term trend integrity line.** If price is above EMA20, trend is intact. If below, evaluate weakness. Simple, binary, actionable.

3

## Key Levels

**Breakouts, retests, sweeps—horizontal structure.** This is the map for all entries and exits. Mark them clearly and respect them religiously.

# Timeframe Hierarchy

Different timeframes answer different questions. The key to avoiding confusion and conflicting signals is understanding what each timeframe tells you—and consulting them in the correct order. This hierarchy moves from macro context down to precise execution, ensuring alignment at every level before capital is deployed.



## Monthly

**What regime or macro cycle are we in?** Bull market, bear market, or range-bound consolidation? What's the dominant narrative driving institutional flows?



## Weekly

**Is the trend accelerating or stalling?** Are we making higher highs and higher lows? Is momentum building or fading? This is your swing context.



## Daily

**What is the swing direction?** Bullish structure, bearish structure, or choppy range. This determines whether you're looking to go long, short, or stand aside.



## 15-Minute

**Is the setup forming?** Reclaim, retest, sweep structure. This is where you identify the specific pattern you'll trade and begin watching for entry triggers.



## 5-Minute

**When exactly do I enter?** The precise candle, the exact price level, the moment of execution. This is trigger-pulling time, not analysis time.

---

Following this hierarchy eliminates mixed signals, confusing charts, emotional decisions, premature entries, and misaligned trades. When all timeframes align, conviction is high. When they conflict, you wait.

# The Five AltVest Setups

These five patterns capture nearly all asymmetric opportunities in modern markets. Master these, and you'll never lack for high-probability setups. Each has clear entry rules, defined invalidation levels, and a logical basis in market structure and order flow dynamics.

01

## Breakout → Retest → Reclaim

The most reliable continuation setup. Price breaks above resistance, pulls back to test it as new support, then reclaims and continues higher.

**Entry:** On the reclaim of the level after retest.

**Invalidation:** Loss of retest level with volume.

02

## Sweep → Reclaim

Price flushes below a key low to trigger stops and trap sellers, then immediately closes back above. This is stop-hunt behavior followed by reversal.

**Entry:** Reclaim close above the swept level.

**Invalidation:** Fresh low below the sweep.

03

## First Higher Low After Capitulation

Earliest sign of a trend reversal after a heavy selloff. Capitulation creates the low, then the first higher low signals buyers are stepping in.

**Entry:** As higher low forms and holds. **Invalidation:** Break of capitulation low.

04

## Trend Acceleration Candle

High-volume thrust in the direction of the existing trend. Strong hands are adding to positions aggressively, creating explosive momentum.

**Entry:** Late in candle or on micro pullback. **Invalidation:** Loss of candle low.

05

## Multi-Week Rerate

A long base followed by a narrative or fundamental catalyst. The stock has consolidated for weeks or months, then breaks out on new information.

**Entry:** After confirmation the base has broken and held. **Invalidation:** Failure back inside the old range.

# The Daily Ritual

Every session begins with structure. Consistency in preparation breeds consistency in results. This ritual takes 15-20 minutes and ensures you're never caught off-guard by market conditions. It's not about analyzing everything—it's about knowing what matters today.



## Macro Snapshot

Index futures (ES, NQ), Treasury yields (US10Y), Dollar Index (DX), and macro calendar events. What's the backdrop?



## Crypto Structure (BTC/ETH)

Check VWAP, key levels, and liquidation clusters. Crypto often leads or lags risk-on/risk-off flows.



## Premarket Checks

Gap up or down? Volume profile? Any earnings reports or narrative catalyst scans that could drive volatility?



## Morning Plan

Define today's regime: tailwind, neutral, or headwind. List what you WILL trade and what you will NOT trade. Clarity prevents chasing.



## Observe Open

No trades in first 10-30 minutes unless pre-planned structure triggers. Let the market show its hand before committing capital.



## Execution Window

Primary trading window is after structure confirms. Your Daily → 15m → 5m timeframe stack must align before entry.



- This ritual is non-negotiable. Skip it, and you're trading blind. Execute it daily, and you'll never be surprised by market conditions.

# The Weekly Ritual

Consistency comes from preparation. While the daily ritual handles execution, the weekly ritual handles strategic positioning and portfolio management. This is where you zoom out, review the bigger picture, and make deliberate decisions about capital allocation and risk exposure for the week ahead.



## Weekly Chart Review

Analyze trend direction, identify breakouts and failures, and mark critical levels. What worked? What failed? What patterns are emerging?



## Monthly Chart Review

Assess the macro cycle, long-term directional bias, and regime shifts. Are we in accumulation, distribution, or trending?



## Narrative Scan

Review AI developments, semiconductor earnings, energy sector news, automation announcements, and macro catalysts that could drive flows.



## Level Marking

Mark all critical support, resistance, range boundaries, and sweep zones for the week ahead. These become your decision points.



## Position Planning

Plan adds, trims, and rotations across your three buckets. Are you over-weighted anywhere? Under-weighted? What needs adjustment?



## Weekly Guardrail

Explicitly define what you will NOT do this week. This prevents impulse decisions and keeps you disciplined when FOMO strikes.

# Risk Architecture

The AltVest system depends on disciplined risk management. Without proper risk architecture, even the best setups will eventually blow up your account. This framework ensures capital preservation while maintaining asymmetric upside exposure.

## 1 Account Segmentation

- Long-term Swing book
- Options strategies
- Crypto structure trades

Keep these separated with clear allocation percentages. Never let one segment contaminate another.

## 1 Sizing Discipline

Position size follows:

- Setup asymmetry (risk/reward)
- Chart structure quality
- Trend strength alignment
- Category (anchor, high beta, rerate)

Never use the same size for every trade. Risk scales with conviction and structure.

## 1 Structure-Based Stops

Stops go below invalidation levels—not arbitrary percentage numbers or dollar amounts.

If a breakout fails, you're out. If a retest breaks, you're out. Let the chart tell you when you're wrong, not your P&L.

Risk management isn't about avoiding losses—it's about ensuring losses are small and controlled while letting winners run. The AltVest framework enforces this asymmetry systematically.

## Summary

# Trade with structure, not speculation.

AltVest is a modern, narrative-driven trading system that gives you everything you need to navigate AI-era markets with confidence and discipline. This isn't about getting lucky on individual trades—it's about building a repeatable process that compounds edge over time.



### Portfolio Aligned with AI Era

Three-bucket structure captures the full AI infrastructure stack with intentional exposure.



### Timeframe Discipline

Monthly to 5-minute hierarchy ensures alignment before every trade.



### Daily & Weekly Routines

Structured rituals that build consistency and eliminate emotional decision-making.



### Clean Charts

VWAP, EMA20, and key levels—no clutter, no confusion, just actionable structure.



### High-Conviction Setups

Five proven patterns that capture asymmetric opportunities in any market condition.



### Clarity in Every Decision

Know what you're trading, why you're trading it, and when you're wrong—before you enter.