Dev A Phase 3 → Phase 4 Handoff Guide

Purpose of Handoff

This guide outlines the transition from Phase 3 (quant engine implementation) to Phase 4 (autonomy, thesis integration, and narrative-driven strategy selection).

Phase 3 Outputs

Phase 3 delivers a fully operational quant engine: price/macro data ingestion, Backtrader execution, StrategyBase abstraction, three example macro strategies, and the run_backtest interface.

Phase 4 Scope

Phase 4 introduces autonomy: LLM-driven interpretation of ThesisJSON, ObservationJSON ingestion, signal validation, and strategy selection. The engine will no longer be invoked by simple strategy_id—strategy choice will come from thesis semantics.

Technical Requirements

Phase 4 will need: a router module for strategy selection; an evaluator to check consistency between thesis assertions and market data; storage for structured theses and observations; and a run_thesis/thesis_to_action interface.

Dependencies

Phase 4 depends on the stability and determinism of the Phase 3 backtester. StrategyBase, run_backtest, and data loaders must remain stable.

Next Steps

Implement autonomy scaffolding, define thesis-processing pipeline, design routing logic, and connect autonomy outputs to run_backtest or multi-strategy execution.