

MODUS

Trading Dashboard

Advanced Guide

Master the Markets with MODUS

Version 35 - Complete Edition

<https://modus-trading.vercel.app>

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1. API Configuration & Backend Mode

Direct API Mode:

In Direct mode, your API key is stored locally in your browser. Each AI request sends the key directly to Anthropic's servers. This is simple but means you need to enter your key on each device.

Backend API Mode:

Backend mode stores your API key securely on Vercel's servers as an environment variable. Benefits include: no key exposure in browser, works across all devices, centralized management.

Setting Up Backend Mode:

- Fork the MODUS repository on GitHub
- Deploy to Vercel
- Add ANTHROPIC_API_KEY to Vercel Environment Variables
- Enable 'Use Backend API' in MODUS settings

2. SMS Alert System Architecture

How It Works:

MODUS uses email-to-SMS gateways to send free text messages. When an alert triggers, the app sends an email to your carrier's gateway (e.g., 5551234567@tmomail.net), which converts it to an SMS.

Supported Carriers:

- AT&T; (txt.att.net)
- Verizon (vtext.com)
- T-Mobile (tmomail.net)
- Sprint (messaging.sprintpcs.com)
- US Cellular (email.uscc.net)
- Metro PCS (mymetropcs.net)
- Cricket (sms.cricketwireless.net)
- Google Fi (msg.fi.google.com)

EmailJS Configuration:

MODUS uses EmailJS to send emails from the browser. The service ID, template ID, and public key are configured in the app. Free tier allows 200 emails/month.

3. Advanced AI Analysis Techniques

5-Pass Consistency System:

MODUS runs the AI analysis 5 times and reconciles the results. This eliminates random variations in AI output, giving you consistent and reliable analysis every time.

Maximizing AI Accuracy:

- Use clean, trending charts - AI performs better with clear patterns
- Avoid very short timeframes (1m) - more noise, less signal
- Check during high-volume periods for better price action
- Cross-reference with multi-timeframe analysis
- Use the confidence score to gauge reliability

Prompt Engineering:

When using Ask AI, frame your questions with context for better answers. Instead of 'Is AAPL good?', try 'Given the current tech sector rotation and AAPL's recent earnings, what technical levels should I watch for a swing trade entry?'

4. Custom Scanning Strategies

Daily Pick Optimization:

The Daily Pick scanner analyzes 220+ stocks across multiple sectors. You can customize the scan by adjusting filters to match your strategy.

Strategy Combinations:

Momentum + High Volatility: Aggressive day trading setups

Mean Reversion + Low Volatility: Conservative swing trades

Breakout + Technology Sector: Tech momentum plays

Any Strategy + Small Cap: Higher risk/reward opportunities

Scan Timing:

Run scans at different times for different opportunities: pre-market (gap plays), market open (momentum), midday (mean reversion), end of day (swing setups).

5. Risk Management Framework

The 2% Rule:

Never risk more than 2% of your total account on any single trade. This ensures that even a series of losses won't significantly damage your capital.

Portfolio Heat:

Total portfolio heat is the sum of all open position risks. Keep total heat under 6% to maintain adequate diversification and survive correlated moves.

Risk Metrics Table:

Risk Level	Per Trade	Total Heat	Max Positions
Conservative	1%	3%	3
Moderate	2%	6%	4-5
Aggressive	3%	9%	5-6

6. Correlation & Sector Analysis

Understanding Correlation:

Correlation measures how two assets move in relation to each other. A correlation of +1 means they move identically, -1 means opposite, and 0 means no relationship.

Using MODUS Correlation Tool:

- Access via Market Overview or dedicated Correlation section
- Enter two or more symbols to compare
- View the correlation matrix
- Use for diversification - avoid highly correlated positions

Sector Rotation:

The Sector Performance view shows which sectors are leading. In early bull markets, cyclicals lead. In late bull markets, defensives outperform. Use this to time entries.

7. Deployment & Customization

Self-Hosting MODUS:

MODUS is open for deployment on your own infrastructure. This gives you full control over the application and your data.

Deployment Steps:

- Clone the repository from GitHub
- Run 'npm install' to install dependencies
- Create .env.local with your API keys
- Run 'npm run build' to create production build
- Deploy to Vercel, Netlify, or your own server

Environment Variables:

ANTHROPIC_API_KEY: Required for AI features

EMAILJS_SERVICE_ID: For SMS alerts

EMAILJS_TEMPLATE_ID: For SMS alerts

EMAILJS_PUBLIC_KEY: For SMS alerts

8. Performance Optimization

Browser Performance:

- Use Chrome or Edge for best performance
- Close unused tabs to free memory
- Disable browser extensions while trading
- Use a wired internet connection for stability

App Settings:

MODUS checks prices every 10 seconds and the clock updates every second. This is optimized for real-time trading while maintaining smooth performance.

Understanding Loading States:

The status indicator in the header shows what's currently running. AI operations (Chart Analysis, Daily Pick, Ask AI) take 3-10 seconds due to API response times. This is normal and expected.

TIP: For fastest AI responses, use during off-peak hours (early morning or late evening).