

6. Trading: Trading Groups

Trading Groups define leverage and trading parameter overrides for clients registered within the system.

Trading Groups are the single source of truth for leverage. Symbols and Trading Pairs do not define or influence leverage in any margin, execution, or risk calculation.

Finding the Page

Left navigation → Trading → Trading groups

Page Layout & Controls

+ **Add** — Opens the Add Trading Group form.

Search Field — Allows users to search for trading groups by entering relevant keywords or identifiers.

Total — Shows the number of trading groups displayed in the table.

Locked Leverage Groups

The system includes 5 predefined, locked **Trading Groups**:

1. Leverage 1:10
2. Leverage 1:100
3. Leverage 1:200
4. Leverage 1:400
5. Leverage 1:500

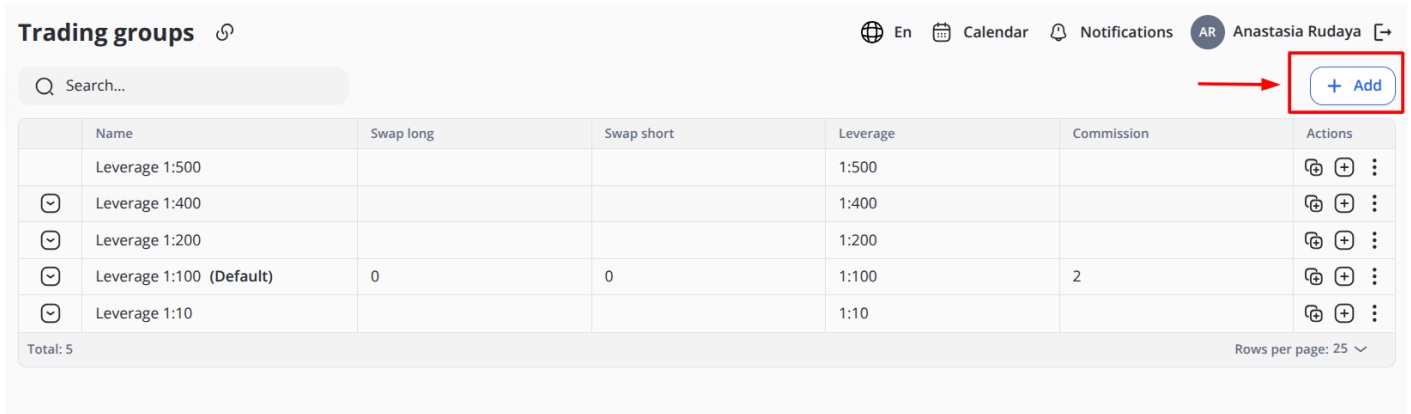
These groups:

1. Can be modified or deleted
2. Can define category-level overrides
3. Are available for assignment to any client

On account creation: The system automatically assigns a trading group, which is marked as default.

Creating a Trading Group

Click **+ Add**



	Name	Swap long	Swap short	Leverage	Commission	Actions
	Leverage 1:500			1:500		
	Leverage 1:400			1:400		
	Leverage 1:200			1:200		
	Leverage 1:100 (Default)	0	0	1:100	2	
	Leverage 1:10			1:10		

Total: 5 Rows per page: 25

General Section

- **Name:** Full descriptive name
- **Leverage:** Defines the base leverage for the group

“ Example:

1:10

1:100

1:400

- **Swap Long:** Defines the swap value applied to long positions
- **Swap Short:** Defines the swap value applied to short positions
- **Commission:** Commission value applied to trades
- **Active (toggle):** If disabled, the group remains stored but cannot be used for new assignments.




Click **Save**

Group Configuration Overrides





To add specific values for **Symbols** and **Symbol groups** for the trading group, select the group from the **Trading groups** table and choose one of the actions you need: **add Symbol** or **Symbol**


group.

Trading groups 

En  Calendar  Notifications  Anastasia Rudaya 

Search... [+ Add](#)

	Name	Swap long	Swap short	Leverage	Commission	Actions
	Leverage 1:500			1:500		  
	Leverage 1:400			1:400		  
	Leverage 1:200			1:200		  
	Leverage 1:100 (Default)	0	0	1:100	2	  
	Leverage 1:10			1:10		  

Total: 5 Rows per page: 25 

You may define overrides for the following **Symbol groups**:

1. Forex
2. Crypto
3. Commodities
4. Stocks
5. Indices

Example:

- Group: Forex
- Swap Long: -3.5
- Swap Short: 1.2
- Leverage 1:200
- Commission: 0.05

**Example values are provided for demonstration purposes only*

To define configurations for specific **Symbols** (trading pairs) like BTC/USDT, ETH/BTC, or NEO/USDT, set configurations for each field:

Example:

- Symbol: BTC/USDT
- Swap Long: -0.16
- Swap Short: 0.5
- Leverage 1:200
- Commission: 0.05

**Example values are provided for demonstration purposes only.*

If no override exists, the group applies the default configurations.

What Trading Groups Can Override

Trading Groups may override:

1. Commission
2. Swap long
3. Swap short
4. Category-level leverage

They do NOT override:

1. Price feeds
2. Tick size
3. Contract size
4. Trading hours
5. Weekend rules
6. Price deltas

The following is no longer supported:

1. Margin ratio defined on Symbols
2. Leverage defined in Trading → Configurations
3. Multiple group stacking for leverage resolution

Leverage resolution is strictly: Account → Trading Group → Category Override → Effective Leverage

Assigning Trading Group to an Account

When a new client is created inside our system, it automatically assigns the trading group marked as default.

This group serves as the initial trading configuration for all newly registered accounts and defines leverage, swaps, and commission settings. Values for specific Symbols or Symbol Groups are not defined by default.

The assigned **Trading Group** can be changed manually later if the client requires different trading conditions.

To change the **Default group**:

1. Choose the client in the **Clients** module that requires changes

WIFOX CORE SOLUTION

Projects

Analytics

Projects

Desks

Buckets

Employees

Roles

Clients

Actions

Requests

Core Banking MS

Accounts

Clients

Personal Business Search... Use AI

Trust x Gmail filter x

	Email ↓↑	ID	UID	Full name ↓↑	Status ↓↑	Actions
<input type="checkbox"/>	personal.fae_stracke70@hotmail.com	69dd0f414646a6682de071d0	c00009z	Fae Stracke	● Default	
<input type="checkbox"/>	personal.jamarcus_schinner@gmail...	69d8f9034646a6682d9aa7f3	c00009x	Jamarcus Schinner	● Default	
<input type="checkbox"/>	personal.roel_crona51@yahoo.com	69d811af4646a6682d85947e	c00009v	Roel Crona	● Default	
<input type="checkbox"/>	personal.carli_cummerata@hotmail...	69d4e5567ee1974137793a13	c00009t	Carli Cummerata	● Test	
<input type="checkbox"/>	personal.magali_hyatt@yahoo.com	69cfd3237ee1974137ed1047	c00009r	Magaliφi Hyatt	● Default	
<input type="checkbox"/>	personal.ray_little@gmail.com	69be4269ee5156fd855d8386	c00009p	Ray Little	● Test	
<input type="checkbox"/>	lejef61801@soco7.com	69be4251ee5156fd855d8280	c00009o	Test	● Default	
<input type="checkbox"/>	personal.khalil_altenwerth73@yaho...	69ba6c61968b910daf737f0c	c00009m	Khalil Altenwerth	● Default	
<input type="checkbox"/>	pavel.p@wifox.org	69b9461e2abf61c8b9e5f7d1	c00009l	Pavel	● Default	
<input type="checkbox"/>	personal.onie_jones@yahoo.com	69b82e672a77a31d7348ac9e	c00009j	Onie Jones	● Default	
<input type="checkbox"/>	personal.deja_jacobson15@gmail.co...	69b1ce712a77a31d73466958	c00009h	Deja Jacobson	● Default	
<input type="checkbox"/>	personal.gage.gottlieb71@gmail.com	69b13d5f2a77a31d734635d5	c00009f	Gage Gottlieb	● Default	

Total: 200 Rows per page: 50

2. Click **Edit** on the right side of the table

WIFOX CORE SOLUTION

Projects

Analytics

Projects

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Clients

Personal Business Search... Use AI

Trust x Gmail filter x

	Email ↓↑	ID	UID	Full name ↓↑	Status ↓↑	Actions
<input type="checkbox"/>	personal.fae_stracke70@hotmail.com	69dd0f414646a6682de071d0	c00009z	Fae Stracke	● Default	
<input type="checkbox"/>	personal.jamarcus_schinner@gmail...	69d8f9034646a6682d9aa7f3	c00009x	Jamarcus Schinner	● Default	
<input type="checkbox"/>	personal.roel_crona51@yahoo.com	69d811af4646a6682d85947e	c00009v	Roel Crona	● Default	
<input type="checkbox"/>	personal.carli_cummerata@hotmail...	69d4e5567ee1974137793a13	c00009t	Carli Cummerata	● Test	
<input type="checkbox"/>	personal.magali_hyatt@yahoo.com	69cfd3237ee1974137ed1047	c00009r	Magaliφi Hyatt	● Default	
<input type="checkbox"/>	personal.ray_little@gmail.com	69be4269ee5156fd855d8386	c00009p	Ray Little	● Test	
<input type="checkbox"/>	lejef61801@soco7.com	69be4251ee5156fd855d8280	c00009o	Test	● Default	
<input type="checkbox"/>	personal.khalil_altenwerth73@yaho...	69ba6c61968b910daf737f0c	c00009m	Khalil Altenwerth	● Default	
<input type="checkbox"/>	pavel.p@wifox.org	69b9461e2abf61c8b9e5f7d1	c00009l	Pavel	● Default	
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<input type="checkbox"/>	personal.deja_jacobson15@gmail.co...	69b1ce712a77a31d73466958	c00009h	Deja Jacobson	● Default	
<input type="checkbox"/>	personal.gage.gottlieb71@gmail.com	69b13d5f2a77a31d734635d5	c00009f	Gage Gottlieb	● Default	

Total: 200 Rows per page: 50

3. Select **Trading Groups** in the table header

WIFOX CORE SOLUTION

General Actions Documents Requests Transactions Accounts Assets Invoices Orders **Trading groups** Agreements Sessions

Level: ● Verified Status: Init Registered: 25.04.2026, 00:54 Last login: Not yet State Active Create asset

Personal

Type: Personal

Status: ● Xxxxx

First name: Bob

Last name: Bobo

Phone number: +1718555121322

Additional phone ...: Enter

Billing

Country: United States

Region: California

City: Los Angeles

Address: 123 Main Street

Postcode: 90001

Affiliation

Project: ProjectTestee

Desk: ProjectTestee default

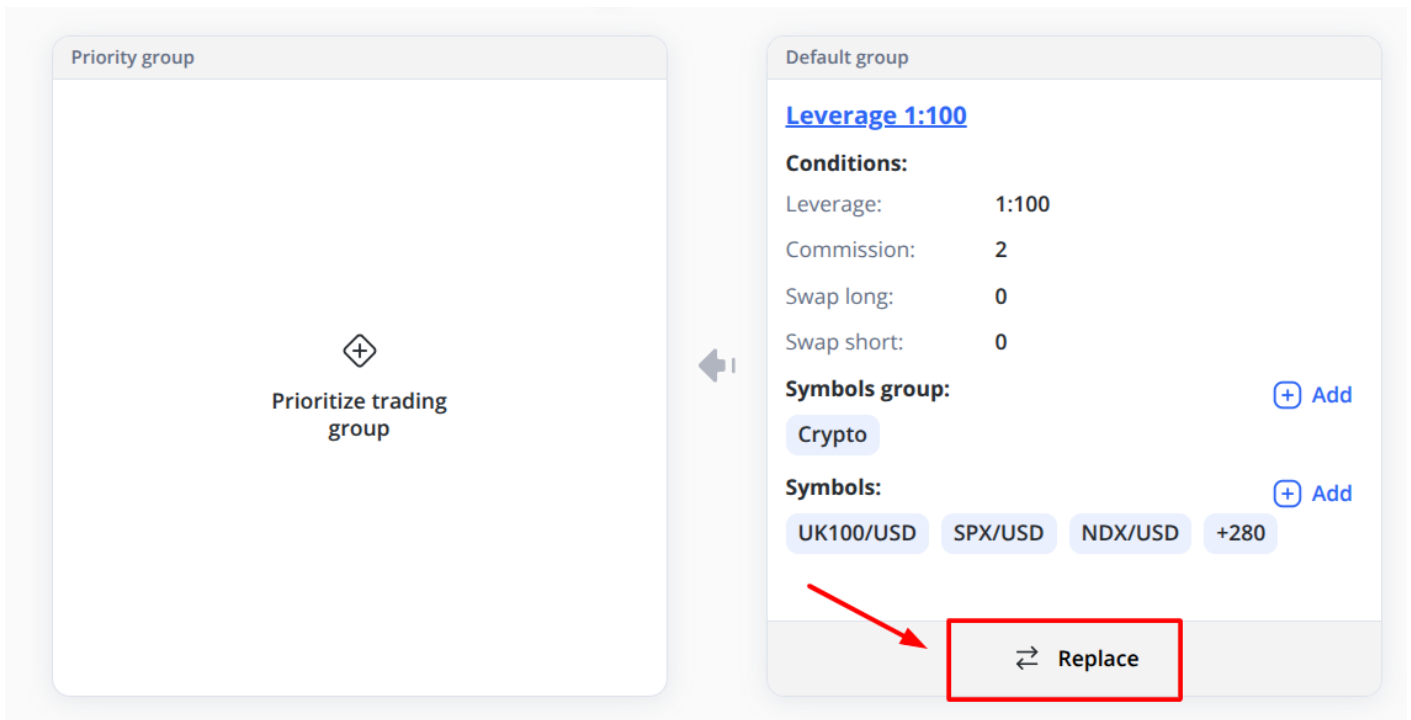
Manager: 66d1c0d14ebf7328c98eefb2

Company fee gro...: Default

AffiliateID: aaa

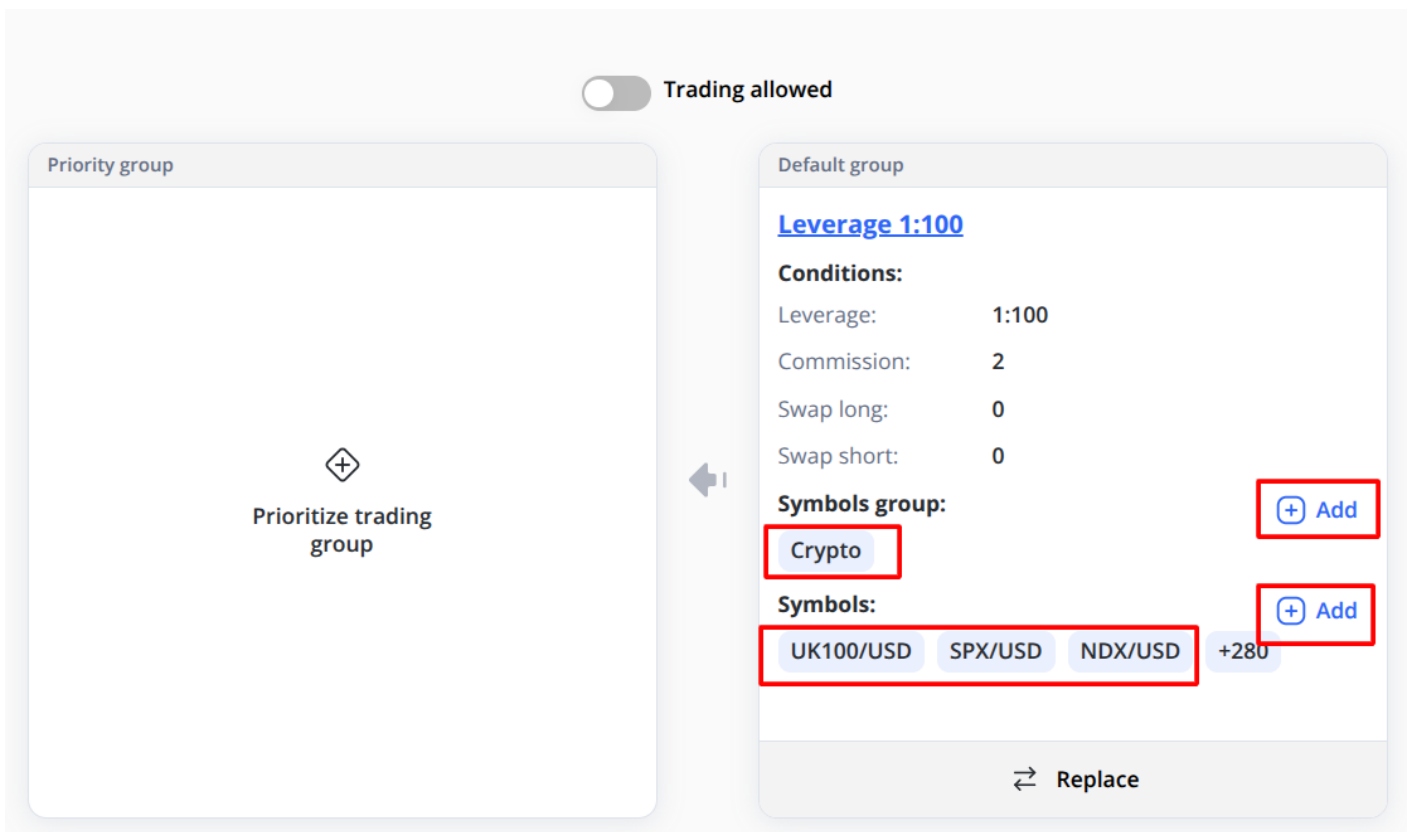
Campaign ID: Enter

4. Click **Replace** and select the required option from the drop-down list



5. Click **Save**

You can also add values for specific **Symbols** or **Symbol Groups** within this **Default group**. For example, if you need to add custom values for crypto trades, open the window with the current values for the **Default group** and click Add to configure settings.



Then:

1. In the window that opens, select the required category from the drop-down menu.
2. Assign values for Swap Long, Swap Short, Leverage, and Commission.
3. Save the changes.

In this way, you can define all required specific settings.

Hierarchy of Values

When the client initiates a buy or sell trade, the system determines which value configuration to use as follows:

- First, it checks whether specific values are predefined at the **Symbol level**.
- If no Symbol-level values are defined, the system checks the **Symbol Group level**.
- If no specific values are configured at either the Symbol or **Symbol Group** level, the system applies the default settings from the assigned **Trading Group**.

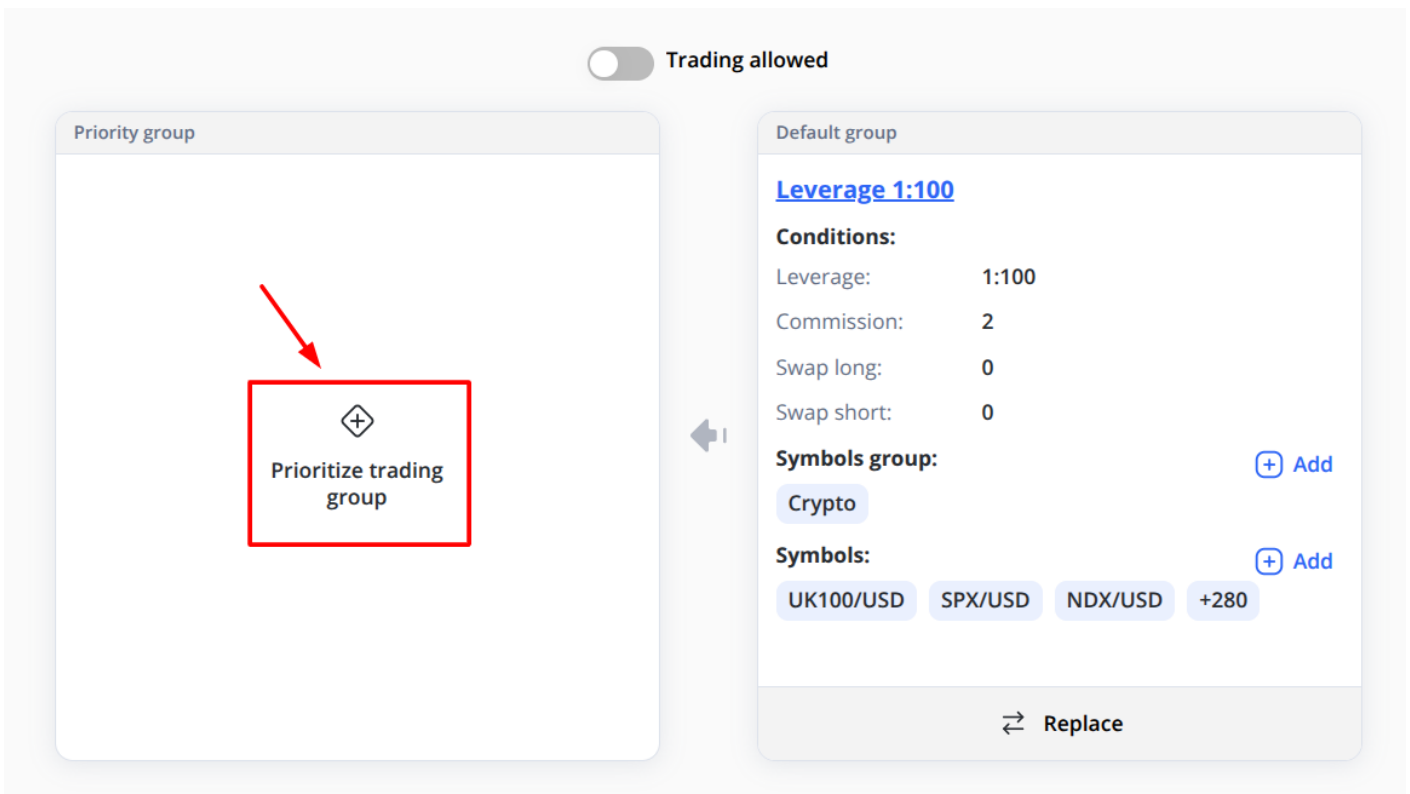
This creates the following hierarchy for applying value configurations:

Symbol → Symbol Group → Trading Group

Changing the Default group to the Priority group

If your client requires specific configurations for **Symbols** or **Symbol Groups**, you can change their default Trading Group to the Priority Group.

Follow these steps:



1. Choose the client in the Clients module that requires changes
2. Click Edit on the right side of the table
3. Select Trading Groups in the table header
4. Click + Prioritize Trading Group and select the required option from the drop-down list
5. Click Save
6. In the Priority Group Settings window, choose a specific Symbol Group or Symbol and set the required values

In this case, the hierarchy for applying configurations will be as follows:

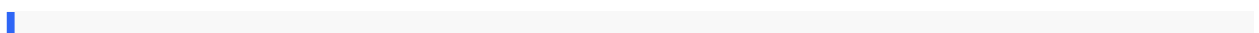
1. Symbols in the Priority Group
2. Symbol Groups in the Priority Group
3. Symbols in the Default Group
4. Symbol Groups in the Default Group
5. Default configurations of the Trading Group

The system must always have one active Trading Group assigned to each client before trading is allowed.

Multiple group ordering logic is no longer used for leverage.

Specifics of Changing Trading Group

If the account has open positions, a modal appears:



Recalculate margin for current open positions?
Yes / No

If "Yes" Selected

1. All open positions are recalculated using new effective leverage
2. Margin requirement updates immediately
3. Liquidation levels adjust accordingly

If "No" Selected

1. Existing positions keep original leverage and margin
2. New orders use the new Trading Group leverage
3. Stored leverage on positions remains unchanged

Position Leverage Storage

At order execution:

1. Effective leverage is calculated
2. That leverage is stored on the Position
3. It becomes immutable

Stored leverage is used for:

1. Margin maintenance
2. Liquidation checks
3. Risk monitoring
4. PnL exposure logic

If Trading Group changes later and "No recalculation" was selected:
Existing positions continue using stored leverage.

Leverage Architecture

Core Principle

Leverage is resolved exclusively through Trading Groups.
Symbols and Trading Pairs never define leverage.

Effective Leverage Resolution

When an order is placed:

1. System reads the account's Trading Group
2. System checks for an instrument category override
3. If override exists → use override leverage
4. If no override exists → use group default leverage

“ Effective Leverage =
Category Override (if exists)
else Group Default Leverage

The effective leverage is:

1. Applied during margin validation
2. Stored on the Position at execution
3. Used later for liquidation and risk logic

Margin Calculation

“ Margin is calculated using stored leverage on the position:
Margin = Contract Size × Volume × Price / Stored Leverage

For example:

1. Contract Size = 100,000
2. Volume = 0.1 lot
3. Price = 1.1000
4. Stored Leverage = 100

Calculation:

- $\text{Margin} = 100,000 \times 0.1 \times 1.1000 / 100$
- $\text{Margin} = 110$
- So, the required margin is 110.

The system does not read leverage from:

1. Symbol
2. Trading pair configuration
3. Historical group values

Only stored leverage is authoritative.

Editing & Deleting Groups

Edit

Open the form → Modify values → Save.

Changes affect:

1. New orders immediately
2. Existing positions only if recalculation was selected

Delete

Deleting a group:

1. Removes it from availability
2. Does not delete historical stored leverage on positions

Locked default groups cannot be deleted.

Interaction With Trading Configuration

Trading → Configurations remains baseline for:

1. Symbol setup
2. Contract size
3. Trading hours
4. Swap defaults (if not overridden)
5. Commission defaults (if not overridden)

Leverage is never read from Trading pairs.

Best Practices

1. Use predefined leverage groups whenever possible.
2. Avoid excessive category overrides unless required by risk policy.
3. Review open positions before changing leverage for large accounts.
4. Use clear and descriptive Names. Label is generated automatically.
5. Document internal criteria for assigning leverage tiers.

Glossary

Trading Group

Container defining leverage and trading parameter overrides for clients.

Default Leverage

Base leverage defined at group level.

Category Override

Optional leverage rule for instrument family.

Effective Leverage

Leverage resolved at order execution.

Stored Leverage

Immutable leverage saved on a Position at creation time.

Revision #10

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