One-page trading plan template (PDF)

UXS · https://uxs.nz/basics/how-to-write-a-trading-plan/ · 2026-11-10 · Educational only, not financial advice

Fill in, sign and date. Review monthly.

Scope

Markets and instruments _____

Timeframe and trading hours (time zone) _____

Setups (one line each)

Setup 1: name, conditions, invalidation _____

Setup 2: name, conditions, invalidation _____

Setup 3: name, conditions, invalidation _____

Entries and exits

Order types and entry trigger _____

Stop placement rule _____

Exit rule (target / trailing / time) _____

Risk limits

Risk per trade (% and $) _____

Daily loss stop and weekly drawdown limit _____

Maximum open positions / correlated positions _____

Behaviour rules

- [ ] After two losses in a row: stop or pause
- [ ] News rule written (trade / do not trade releases)
- [ ] No trades outside listed setups

Review

Daily log / weekly review day / monthly review date _____

Signed and dated _____

Sources: FINRA: Day trading; SEC Investor.gov: Risk tolerance; CFTC: Basics of futures trading; NFA: Investor education and resources. Full explanation and links: https://uxs.nz/basics/how-to-write-a-trading-plan/

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