Forex lot-size worksheet (PDF, 1 page)

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Fill this in before each trade. It turns your stop distance into a lot size so the loss at the stop matches your limit.

Step 1: your limit

Account balance ($) _____

Risk per trade (% of balance) _____

Risk in dollars = balance × % _____

Step 2: the trade

Pair and direction _____

Entry price _____

Stop price _____

Stop distance in pips _____

Step 3: pip value per standard lot

- Pairs ending in USD (EUR/USD, GBP/USD, AUD/USD): $10 per pip per standard lot
- USD/JPY: 1,000 ÷ current USD/JPY rate
- Other pairs: (pip size × 100,000) ÷ USD rate of the quote currency

Pip value per standard lot ($) _____

Step 4: lot size

Lots = risk in dollars ÷ (stop pips × pip value) _____

Rounded down to broker step (0.01) _____

Before you click

- ☐ Lot size rounded down, not up
- ☐ Margin needed is well below free margin
- ☐ Spread and commission included in the stop distance
- ☐ No other open trade on a closely related pair

Sources: CFTC: Foreign currency (forex) fraud advisory; NFA: Investor education and resources; FRED: US dollar to euro exchange rate (DEXUSEU); FRED: Japanese yen to US dollar (DEXJPUS). Full explanation and links: https://uxs.nz/forex/what-is-a-lot-size-in-forex/

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