IntelliBot

Public Product Information Guide

Risk-first retail crypto trading automation for Coinbase Spot

Phase 0 Alpha Public Reference Edition

Public-consumption note

This guide is designed for prospective customers, early testers, design partners, and interested stakeholders. It is informational only. It is not investment advice, not a performance claim, and not an offer to sell securities.

Prepared for public consumption | Current as of June 2026

Document Control

Field	Value
Document title	IntelliBot Public Product Information Guide
Public edition	Phase 0 Alpha Public Reference Edition
Audience	Prospective customers, early testers, design partners, and interested stakeholders
Purpose	Explain IntelliBot product scope, risk-first operating model, public roadmap, user workflow, proof gates, and public-facing boundaries.
Source basis	Updated from the earlier product-focused marketing guide and the current Phase 0 Alpha requirements-closure baseline.
Excluded content	No asset-specific breakout claims, no guaranteed-profit language, no live trading claims, no securities offering, no public financing solicitation, and no internal development-control instructions.

Contents

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1. Executive Overview

IntelliBot is being built as a risk-first, proof-first automated crypto trading cockpit for retail users who want disciplined Coinbase Spot automation without leverage, short selling, custody, or black-box AI execution.

The product thesis is deliberately restrained: automation should not mean overactivity. IntelliBot is designed to teach, validate, explain, and protect before it executes. The operating sequence is education first, configuration second, proof third, sandbox fourth, and live arming last.

Current public status

Alpha Phase 0 is in progress. Phase 0 is focused on product governance, user workflow design, proof contracts, risk boundaries, documentation, and implementation readiness. This guide does not claim that live trading functionality is commercially available.

This public guide intentionally avoids market-movement case studies, coin-specific breakout narratives, guaranteed-performance language, and claims that past market behavior proves future product value.

2. What IntelliBot Is

IntelliBot is a Windows-local, Python/PyQt5, local-first trading cockpit for Coinbase Advanced Trade. The initial trading model is Coinbase Spot only, USD-quoted markets, long-only execution, one active trade at a time, and non-custodial API-key usage without withdrawal permissions.

Product attribute	Initial public scope
Execution venue	Coinbase Advanced Trade API
Market type	Coinbase Spot only
Direction	Long-only active trading
Concurrent trades	One active trade maximum
Custody	Non-custodial; no possession of user funds
API permissions	View and trade permissions only; no withdrawal permissions
Backtester	Internal IntelliBot event-driven backtester is canonical
AI/news role	Advisory and risk-reduction context only
Default posture	Risk-first command center with guided education and readiness checks

This narrower starting scope is a trust strategy. It reduces execution ambiguity, makes the audit trail easier to reconstruct, keeps risk visible, and allows every trade decision to be explained or vetoed.

3. Product Boundaries and Public Messaging Rules

The public website and downloadable materials should describe IntelliBot as a risk-first automation cockpit, not as a guaranteed-performance product or investment adviser.

Use	Avoid
Risk-first automation	Guaranteed profit, passive income, or “beat the market” claims
Strategy validation and sandbox-first workflow	Claims that backtests prove future results
Non-custodial, no withdrawal permissions	Custodian, broker, adviser, exchange, or fund-management language
AI/news as advisory context	AI or news as autonomous trading authority
Coinbase Spot, long-only, one active trade	Margin, leverage, futures, derivatives, short selling, or multi-position concurrency
Public informational guide	Public securities offering or investor solicitation

Investor and stakeholder boundary

This guide may help interested stakeholders understand the product direction. It is not a securities offering, not a solicitation, not investment advice, and not a financing document. Any capital-raising path must be handled through later compliance-controlled workflows.

4. Who IntelliBot Is For

Audience	Primary need	How IntelliBot serves them
Beginner	Education, safety, low configuration burden, and confidence before live trading.	Conservative defaults, Settings-first onboarding, sandbox-first workflow, readiness explanations, and “why no trade?” guidance.
Intermediate retail trader	Configurable strategies, proof gates, backtesting, and clear trade reasons.	Balanced profile, strategy activation matrix, Backtesting workspace, and reporting/post-trade forensics.
Advanced retail trader	Deeper control, measurable edge, auditability, custom parameters, and market context.	Advanced UI mode, structured strategy taxonomy, risk-center controls, session-aware strategies, news/event overlays, and exports.
Design partner / interested stakeholder	Evidence of product discipline, defensible differentiation, and roadmap clarity.	Risk-first positioning, bounded commercialization pathway, auditable validation model, and public-safe roadmap boundaries.

5. Public Roadmap and Current Phase

The public roadmap below translates the internal phase model into customer-readable roadmap bands. It is not a release promise and does not authorize features before their phase gate is approved.

Phase	Public meaning	Current posture
Phase 0 - Alpha governance and readiness	Product constitution, risk boundaries, user workflow, proof contracts, documentation, website-safe material, and implementation readiness.	In progress; current active phase.
Phase 1 - Local foundation	Local application foundation, settings, persistence, credential security, setup gates, diagnostics, and account onboarding.	Not yet active.
Phase 2 - Risk and market-data foundation	Risk profile behavior, market universe controls, indicators, data validation, and safety-aware strategy foundations.	Future phase.
Phase 3 - Strategy proof and backtesting	Internal event-driven backtesting, proof gates, strategy validation, sandbox eligibility, and validation reports.	Future phase.
Phase 4 - Live-trading cockpit	Order lifecycle, one-active-trade supervision, exits, emergency controls, audit events, and live arming boundaries.	Future phase.
Phase 5 - Reporting and beta readiness	Performance reports, audit-linked exports, diagnostics, tester workflows, support evidence, and private beta readiness.	Future phase.
Phase 6 - Release candidate hardening	Installer hardening, QA, security review, final claim review, support workflows, and release preparation.	Future phase.
Phase 7 - Commercialization and compliance perimeter	Public launch, pricing, investor communications, legal/compliance review, and commercialization controls.	Future phase; not active during Phase 0.

6. User Interface and Workflow

The current authoritative UI model uses seven dedicated left-navigation surfaces. Standalone Screener, Charts, and AI/Sentiment pages have been retired as separate navigation surfaces. Their functions are embedded where users need them, especially inside Live Trading, Strategies, Backtesting, Risk Center, Reporting, and Settings.

Navigation surface	Public-facing purpose
Dashboard	Risk-first command center showing readiness, account state, active constraints, “why no trade?” explanations, and status overview.
Live Trading	Supervises the single active long spot trade. Owns embedded candidate screener, integrated chart, advisory context, guardrails, decision log, timeline, lifecycle controls, and emergency actions.
Strategies	Explains strategy families, eligibility, proof status, activation rules, education, and roadmap strategy boundaries.
Backtesting	First-class validation workspace. Strategies must pass hardened proof gates before sandbox or live trust.
Risk Center	Owns risk profile behavior, drawdown controls, cooldowns, volatility sizing, stop discipline, and active-trade constraints.
Reporting	Shows audit-linked trade history, validation reports, performance forensics, exports, and evidence trails.
Settings	First-run locked workspace for exchange/account setup, credentials, risk profile, provider configuration, security, environment, diagnostics, and readiness checks.

First-run UX

On first launch, Settings is the only enabled workspace until required setup gates are satisfied. Other navigation surfaces unlock progressively with visible lock reasons and readiness status.

Semantic screener state	Meaning
Blocked	Candidate fails a hard gate. The UI must show a reason, not just a color.
Watchlist	Candidate has interest but not enough confirmation.
Qualified	Candidate passes screening but is not yet armed.
Armed Candidate	Candidate is closest to execution but still requires risk, proof, session, and account checks.
Active Position	Current one active trade; receives distinct lifecycle treatment.

7. Risk Profiles and Guardrails

Risk profiles are a core product feature. They translate user confidence and account context into bounded system behavior. Higher configuration does not mean bypassing safety.

Profile	Default risk posture	Target use
Observer	0% live risk; sandbox-forced. Used for learning, diagnostics, and non-live evaluation.	Learning, setup, and non-live observation.
Conservative	1.0% default equity risk per trade; stricter gates, tighter drawdown posture, longer cooldowns.	Beginner and first live-use review.
Balanced	1.5% default equity risk per trade; standard middle risk posture.	Intermediate users after onboarding and validation.
Aggressive	2.0% hard cap; greater opportunity tolerance but still bounded by profile caps and RiskManager veto.	Advanced retail users only.

Risk profiles affect position sizing, spread tolerance, stale-sideways handling, volatility reduction, cooldown behavior, strategy eligibility, proof requirements, drawdown handling, and user confirmations. Profile changes do not retroactively alter an open trade.

8. Strategy Families and Trade Lifecycle

The strategy architecture is designed to be credible without becoming a chaotic strategy marketplace. Strategies emit signals. Signals do not place orders. RiskManager, AccountSafetyWatchdog, proof gates, session rules, market-universe filters, and audit checks must approve before execution can occur.

Core proof-eligible family	Role
ORB 1m / synthetic 3m / native 5m	Session-aware opening range breakout variants with calibrated confirmation rules.
Scalp 1m / synthetic 3m	Micro-momentum and consolidation-breakout logic outside ORB windows.
Scalp 5m	Trend continuation and compression-release setup for slower scalping.
Swing 15m	Slower intraday or multi-session long setups with stronger regime context.

Roadmap family	Role
VWAP Pullback / VWAP Reclaim Long	Mean-reversion-to-strength and reclaim-based continuation logic.
Trend Continuation Pullback Long	Higher-high / higher-low continuation after controlled pullback.
Breakout Momentum / Bull Flag Continuation Long	Momentum entries after validated resistance or consolidation break.
Range Support Bounce Long	Long entries near validated support with structure-based invalidation.
Volume Expansion Long	Participation-based long entries tied to abnormal volume expansion.
Market Structure Classifier	Shared classifier for trend, range, compression, failed breakout, and transition states.

The key public message is simple: IntelliBot is designed to make strategy activation earned, not assumed.

9. Backtesting, Proof Gates, and Market Universe

Backtesting is the proof layer. It is not a marketing ornament. IntelliBot strategies must be testable, reproducible, and blocked from sandbox/live trust until they satisfy objective validation gates.

Interval	Minimum completed closed trades	Minimum chronological window	Public explanation
1m	300	3 months	High-noise short timeframe; must show enough trade density to survive fees, spread, and slippage.
Synthetic 3m	200	6 months	Transition timeframe; synthetic candles must preserve 1m provenance and parity.
5m	150	6 months	Slower scalping cadence; still requires meaningful sample density and cost modeling.
15m	100	12 months	Lower signal frequency; needs a longer window to encounter more market conditions.

Both minimum trade count and minimum chronological window must pass. Completed closed trades exclude canceled, rejected, duplicate, invalid, warm-up, lookahead-contaminated, or test-harness trades.

Net expectancy must be positive after exchange fees, spread, slippage, modeled execution costs, and partial-fill assumptions where applicable. Point-in-time-safe regime review must include bull, bear, sideways/range, high-volatility, and low-volatility conditions.

A strategy proven under one interval, risk profile, market universe, fee model, slippage model, parameter set, or dataset does not automatically inherit proof under another.

Proof report field	Purpose
strategy_id / interval / risk_profile	Prevents broad proof inheritance.
market_universe / data_source	Shows exactly which markets and data were tested.
fee_model / slippage_model / execution model version	Shows cost assumptions and fill realism.
closed_trade_count / chronological window	Separates trade density from time coverage.
net_expectancy / profit_factor / max_drawdown	Quantifies edge, risk, and drawdown behavior.
time_under_water / consecutive_loss_streak	Shows user-relevant discomfort and risk clustering.
regime-level trade counts / expectancy / profit factor	Shows whether the strategy works only in one favorable environment.
backtest_run_id / candle provenance	Supports audit-linked verification and synthetic 3m traceability.

10. News, AI, and Advisory Context

News, event-risk intelligence, sentiment, and AI summaries are context layers, not execution authority. Positive news may explain context but cannot create a buy, increase risk above profile caps, or bypass RiskManager or AccountSafetyWatchdog.

Context layer	Allowed role	Not allowed
News catalyst intelligence	Source-attributed event context, risk suppression, timeline annotation, and point-in-time backtesting overlays.	No trade eligibility and no order placement.
AI / sentiment advisory	Summarize sources, confidence, timestamp/model version, decay, and limitations.	No risk increase and no bypass of RiskManager or AccountSafetyWatchdog.
Dashboard / Live Trading UI	Explain why IntelliBot is ready, waiting, blocked, armed, or trading.	No hidden black-box execution.

The public message is that AI helps explain market context and system posture. It does not replace risk governance.

11. Security, Privacy, and Audit Integrity

Trust requires specific security boundaries. IntelliBot's public security story is local-first, non-custodial, no withdrawal permissions, master-password-protected credential storage, no password recovery backdoor, and audit-linked decision evidence.

Security / audit surface	Public explanation
Local credential encryption	The master password derives a local encryption key. The password is not stored. Credentials are not stored plaintext-at-rest.
No recovery backdoor	Forgotten password requires destructive local credential wipe and readiness reset.
API permission model	View and trade only; no withdrawal permissions.
Operational logs vs audit ledger	Operational logs support diagnostics; audit events reconstruct material lifecycle decisions.
Audit integrity	Material events are planned for append-only, hash-chained, secret-redacted audit evidence. This is tamper-evident, not tamper-proof.
Support privacy	Exports must be redacted and must not contain API secrets or sensitive credentials.

12. Public Reference Notes

This guide is intentionally public-facing. It excludes internal development-control instructions, private project-control details, and implementation steps that are not relevant to public readers.

Public materials should continue to avoid performance guarantees, investment-advice language, securities-offering language, and claims that backtests guarantee future results.

Coinbase Advanced Trade API references are relevant to the product's exchange-connectivity design, but final runtime implementation remains subject to active-phase validation.

Earlier IntelliBot product-focused marketing material served as a source for product-only positioning, risk-first scope, user personas, and proof-first messaging. This public edition supersedes the earlier public guide for website publication review.

13. Public-Safe Summary Statement

Summary

IntelliBot is being designed as a local-first, risk-first crypto trading cockpit that helps retail users understand, test, and supervise Coinbase Spot automation before live capital is exposed. It is not a promise of profit, not investment advice, not a custodian, and not a public financing offer. Its product value is discipline: one active trade, proof before trust, sandbox before live capital, advisory AI that cannot override safety, and a user experience that explains both action and restraint.