

TRADE IDEAS

TURNING KNOWLEDGE INTO
UNMATCHED INSIGHTS



Investors always search for new ways to maximize their profits. There is no lack of educational tools and educational content for these investors. However, there is a real challenge in turning this knowledge into a machine that can automatically execute that knowledge in the real world. California-based Trade Ideas LLC understood this challenge and overcame it by infusing Artificial Intelligence with its trading software. By doing so, the firm has created a rock-solid smart engine capable of handling trading data and analysis in real-time.

Besides managing and analyzing data, the engine also generates actionable insights empowering investors to make data-driven decisions. It is immensely influential as it evolves with the market needs and provides investors an interactive system to learn and practice trading via a simulated virtual trading system.

With this pioneered technology, Trade Ideas, since its inception in 2003, has been serving investors, traders, and market professionals in over 65 countries.

AN ERUDITE LEADER

Backed by over 15 years of professional trading and financial technology experience, Dan Mirkin leads Trade Ideas as its Senior Managing Partner and CEO. He is the driving force behind the customer-facing product development aspects and focuses on helping individuals and professional investors to capture data-driven decisions more quickly.

Prior to forming Trade Ideas, Dan was the CEO of FutureTrade Technologies, a venture-backed institutional trading platform that Interactive Brokers acquired back in 2007. Dan received his BA in Accounting from the University of Texas at Austin in 1994 and studied Finance at the London School of Economics.

When asked how Dan was able to penetrate or disrupt the market, he simply stated that you don't need disruption to be tactically efficient. As a dynamic leader, Dan advises focusing on the correct execution of the business strategy. For Trade Ideas, he concentrates on learning and implementing new things with an unmatched efficiency in the industry.

As the CEO, Dan also makes sure to bring out the best in his team to build the Trade Ideas technology. He also



Dan Mirkin
CEO & Co-Founder

emphasizes that a great leader must have a relationship with his team beyond simply being a CEO or some prominent executive. According to him, this relationship helps foster innovation that makes a business dominate an industry.

UNDERSTANDING THE CRUX OF THE INDUSTRY

The foundational bricks of Trade Ideas are built on learning that empathizes growing a business organically, without raising any capital. Before Trade Ideas, the company's founders, David Aferiat, Philip Smolen, and Dan Mirkin, were all coming off a prominent Venture Capitalist backed venture. Therein, the primary goal was to raise vast amounts of money for the business. Eventually, the founders of the company were kicked out. The company continued to lose money and diluted the shareholders' value and was ultimately purchased by Interactive Brokers.

The vital lesson Dan and Co. learned from the incident was that a business could stand on its own without raising money. This prompted the three individuals to

finalize a simple yet effect plan - Make a profitable business, continue to grow that business slowly, and develop a technological advantage.

When Trade Ideas took its baby steps in the industry, it had no idea generation product that separated it from other Brokerage Platforms. Consequently, it collaborated with some brokerages to commence its journey. However, the company soon realized that these brokerages did not want their customers to trade. Instead, the brokerage would prefer the customer custody their accounts with affiliated money managers who collect fees to manage the money. Brokers made money on the credit balances and payment for order flow to companies.

The founders realized that there was no neutral party motivated to help the investor manage their own money. Hence, the company became the intermediate party and distilled the fundamental essence of investing to individuals. Since then, Trade Ideas has secured a robust place in the industry and has been leading it for 18 years.

At present, Trade Ideas has spread its unyielding roots in the trading market by delivering daily trading strategies in individual stocks via artificial intelligence. As a result, the company has continued to cement its spot among the Inc 5000 list of fastest-growing privately held companies for the 5th year in a row.

THE SECRET MANTRA OF SUCCESS

According to Dan, the secret of the company's success is the server-side technology that provides real-

time decision support and risk management to the investors. Entirely built from scratch, the technology takes on real-time data collection, storage, computation, communication, and relay technology.

Besides server-side technology, the cloud-based real-time computational data engine is the elephant in the room that sees every trade and allows investors to gain actionable insights. The AI in the software looks at everything; long, short, cheap, and expensive, fundamental, social, technical data, everything volume-driven, much more entities, to identify trading probabilities to help beat the market. Through the engine and provided insights, investors take advantage of real-time statistics to make the right decision or draw upon the risk management suggestions. Continuous analysis and reanalysis alongside testing and re-testing have helped the firm to become an unmatched force in the industry.

The AI-powered solution also empowers its users to learn the magic of trading without investing any principal. It offers a comprehensive real-time simulated trading environment that prepares them to engage with the market and manage their profits and losses. Once investors feel confident, they can take their learning takeaways and apply them in the real world. They can go live and connect directly with online brokerages such as Interactive Brokerage, TD Ameritrade, Etrade, and Alpaca.

THE TEAM THAT MAKES IT HAPPEN

Even though it has been almost two

decades since its inception, the culture at Trade Ideas remains of a tight-knit startup. People at the firm are confident enough to be alone as they are in a team.

Oftentimes, they are working on multiple things simultaneously, and some of these things are accomplished alone while others in a group.

Dan tributes all the firm's success to his team, which has practically been the same since its inception. Working for so many years demonstrates the teams' loyalty and passion for the work and how they are treated. People that work at Trade Ideas see that nobody puts themselves above anyone else. In essence, the team Trade Ideas is a big family and without this type of team, it would be impossible for the company to succeed like it has done over the last two decades.

Future Roadmap

Trade Ideas will continue to serve its clients with its exceptional AI-powered engine while improving the technology for the forthcoming years. Dan will also continue to be an innovative force that drives the product moving forward. Under his leadership, the company is headed towards tactical, strategic growth instead of hyper-growth. Dan also feels quite confident that the firm is moving forward, having complete control over its destiny without outside investors.

