iPULSE AI · OPTIONS ALPHA AGENT

Every trade is a claim. We keep the evidence.

An inspectable autonomous options-research and Alpaca paper-trading agent.

6 independent advisors | deterministic authority | broker receipts

Open Agentic Investment Research Platform

Russlan Ramdowar · Future Edge Group FZE

01

Investment teams cannot govern a black-box trading agent.

The buyer is not asking for another signal. The buyer is asking: can we reconstruct why capital moved?

Reasoning drift

A plausible narrative can silently change the strategy after every market move.

Risk bypass

If the same AI proposes and authorizes, a confident mistake can become an order.

Evidence loss

Without dissent, timestamps, and broker reconciliation, post-trade review becomes guesswork.

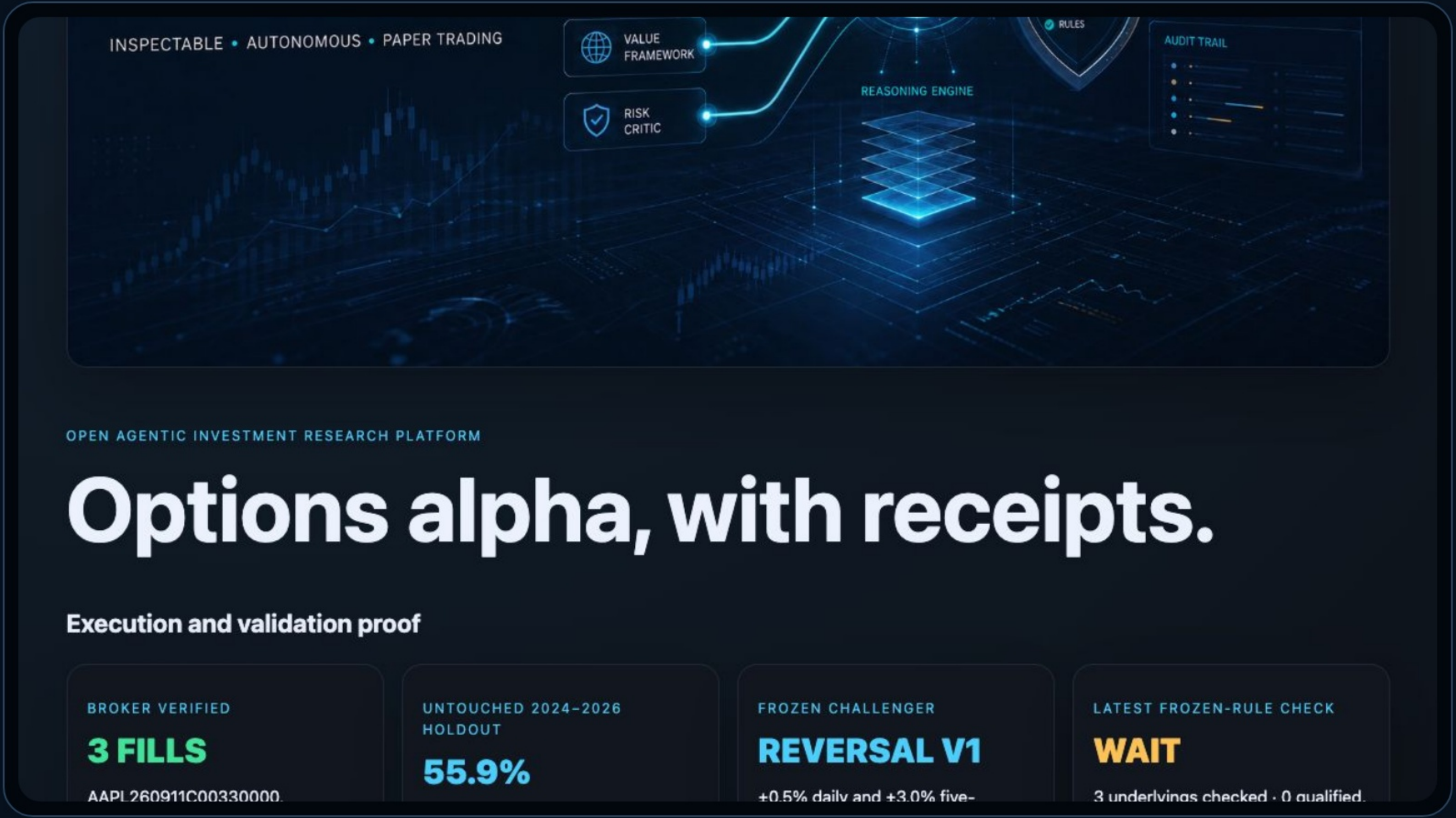
Starting user

RIA research teams · family offices · sophisticated investors

They need AI-scale synthesis without surrendering policy control, auditability, or the ability to abstain.

A working product—not a chatbot wrapper.

Deployed dashboard, public repository, real Alpaca paper evidence, and a replayable decision trace.



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broker-verified option fills

Exploratory v0 · one contract each

127

untouched holdout signals

Frozen reversal v1 · 2024–2026

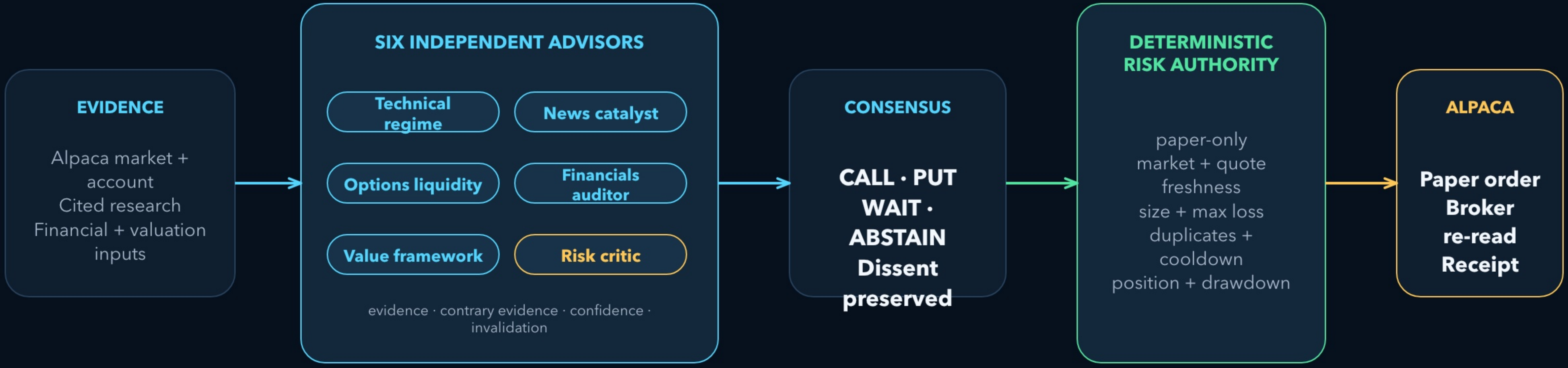
WAIT

latest frozen-rule decision

No qualifying SPY / QQQ / IWM signal

One loop. Two kinds of intelligence. One evidence trail.

Probabilistic research proposes; deterministic policy alone authorizes execution.



Append-only evidence: signal → opinions → vetoes → order → broker result → P&L

AI handles uncertainty. Code controls capital.

This boundary is the product—not a hidden implementation detail.

AI RESEARCH LAYER

Synthesizes technical, news, liquidity, financial, and valuation evidence
Surfaces contrary evidence and invalidation conditions
Expresses calibrated confidence and preserves dissent
Abstains when required evidence is missing

Why AI? Cross-source interpretation and structured adversarial reasoning do not reduce to one rigid indicator.

DETERMINISTIC AUTHORITY

Paper environment and explicit execution switches
Regular session and fresh option quote
One contract · long premium · limit only
USD 500 maximum defined loss
Duplicate, cooldown, position, and daily-loss gates

Every failed check becomes WAIT or REJECT. No advisor or model can bypass these controls.

AI can abstain. AI cannot bypass.

We separate broker proof from strategy proof.

Execution evidence answers “did the safe path work?” Holdout evidence answers “did the frozen idea survive?”

ALPACA PAPER EXECUTION · EXPLORATORY V0

3 filled orders

$825 max premium risk

-$13.09 captured P&L

AAPL · XLF · AMZN calls · one contract each · long-premium limits

Short paper snapshot. Proves broker integration and bounded loss—not v1 profitability.

FROZEN REVERSAL V1 · UNTOUCHED 2024-2026

127 signals

55.9% win rate

1.39 profit factor

+0.218% avg signed move

Event-frequency Sharpe proxy 0.88 · 95% Wilson interval 47.2%-64.2%

Underlying two-session directional diagnostic—not options P&L. Fees, spread, decay, and slippage excluded.

Trust grows when the agent shows failure—and restraint.

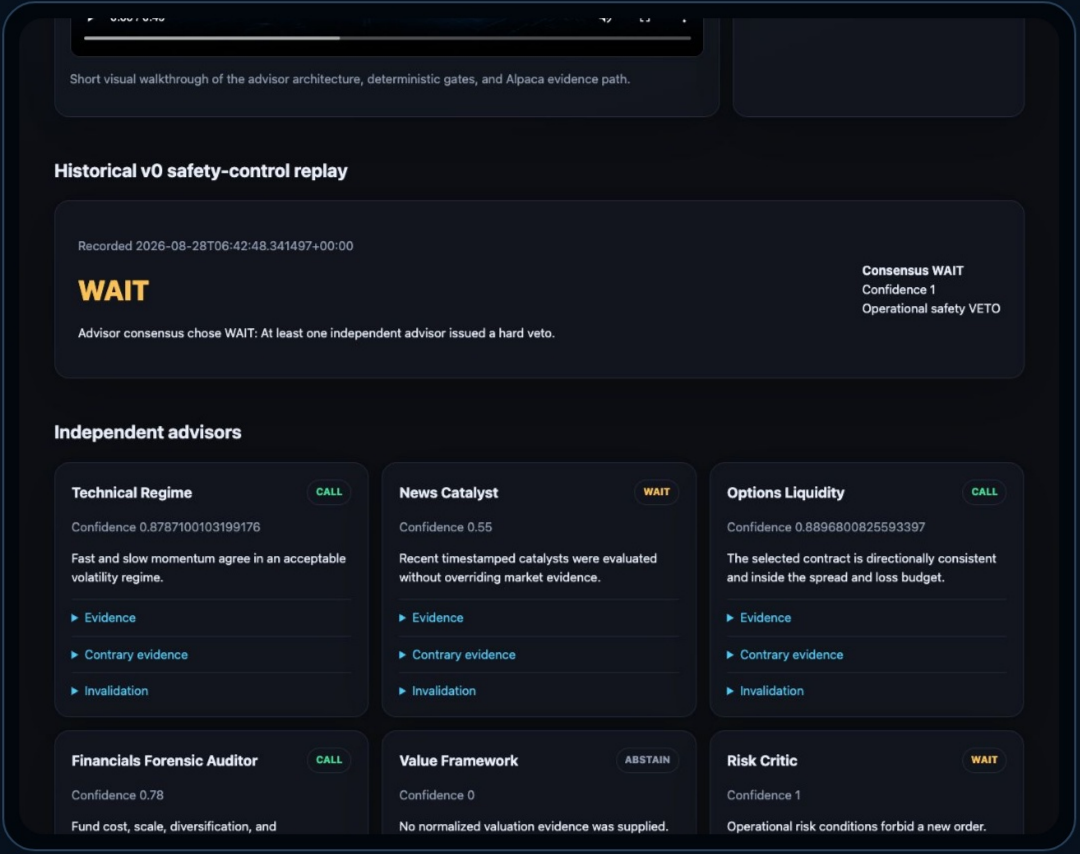
Negative results and WAIT decisions are product outputs, not presentation problems.

PUBLISHED FAILURE

Momentum v0

Failed its holdout. We kept the evidence, retired the strategy, and froze the challenger before the next test.

failure remains public



LATEST FROZEN CHECK

WAIT

0 of 3 qualified

SPY, QQQ, and IWM did not meet the frozen exhaustion rule. No order was requested.

restraint is observable

Governance software for the $177T adviser market.

Start with U.S. investment-adviser research teams that need inspectable AI before scaling autonomy.

22,932

U.S. investment advisers

SEC 2025 statistics

$177T

regulatory AUM

SEC 2025 statistics

ILLUSTRATIVE U.S. SOFTWARE TAM

≈ $275M / year

22,932 advisers × assumed $12k annual contract. Assumption, not a forecast.

Product wedge

Evidence-governed research workflow

Research teams review advisor evidence, policy vetoes, model limitations, and broker outcomes in one audit trail.

TEAM SAAS

$499-$1,999 / month

Seats, policies, evidence retention

ENTERPRISE

annual license

Private deployment + governance

API

usage-based

Research and evidence primitives

Source: U.S. SEC Investment Adviser Statistics, 2025 · TAM uses an explicit annual-contract assumption

The moat is falsifiable research governance.

What judges can verify that many trading-agent demos leave implicit.

Governance proof	Typical agent demo	iPulse AI
Research	One model produces one answer	Six independent advisors preserve dissent and abstention
Authority	Reasoning and execution blur together	AI proposes; deterministic policy alone authorizes
Validation	Headline backtest metric	Development / freeze / untouched holdout / Wilson interval
Failure	Happy path is foregrounded	Failed v0 and WAIT decisions remain public
Execution	Order submitted	Paper-only limit → broker re-read → sanitized receipt → P&L

Originality is observable: the agent treats disagreement, invalidation, and refusal as first-class artifacts.

Already working. Ready to extend responsibly.

The next milestone is more forward evidence—not broader risk.

NOW

Deployed dashboard
59 passing tests
3 broker-verified fills
Frozen holdout + full ledger

→

NEXT 30 DAYS

Continuous paper forward test
Position lifecycle + exits
Daily broker reconciliation
Evaluation drift alerts

→

NEXT 90 DAYS

Shadow mode for adviser teams
Policy packs + approvals
Private deployment
No live capital before gates

Inspect the evidence

Live dashboard · GitHub repository

Russlan Ramdowar

Founder · iPulse AI · Future Edge Group FZE

AI proposes. Deterministic risk decides. Alpaca executes. The evidence remains inspectable.