



EDUCATIONAL PROGRAM

**INTERMEDIATES: ONLINE TRADING
PLATFORMS AND TECHNICAL
ANALYSIS**

DURATION

16 HOURS

EDUCATOR - TRAINER

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1. INTERMEDIATES: ONLINE TRADING PLATFORMS AND TECHNICAL ANALYSIS

- The Purpose of the Program

The “Intermediates: Online Trading Platforms and Technical Analysis” educational program aims to teach important information about the Online Investment Platforms, focusing more on the technical side, helping people to develop knowledge and skills around these platforms and systems, network, information exchange and Technical Analysis.

2. Targets/Goals of the Program

Upon completion of the program, the attendees will be in the position to:

Learning Area: Knowledge

1. Explain why there are more than 1 account types offered by Brokers.
2. Describe the connection between the different account details' variables, i.e. Balance and Equity.
3. Explain how Leverage is connected to Margin Used.
4. Explain what Online Investing/Trading Platforms are and who is building them.
5. Refer to the 3 main functions of these Investing/Trading Platforms.
6. Describe the 4 basic features of an Online Trading Platform (i.e. MT4 platform) and its basic tools.
7. Name the main 3 different types of orders sent to the market and explain their differences.
8. Name the 3 different types of Price Charts and how we can modify them.
9. Explain how a candlestick is formed and its parts.
10. Explain what price patterns are and why they are important.
11. Explain why Technical Indicators are used in Technical Analysis.
12. Recognize the type of Indicator, if is Lagging or Leading.

Learning Area: Skills

1. Make use of an Investing/Trading Platform's essential features and tools.
2. Calculate correctly the amounts located in Account Details such as the Pnl if needed.
3. Apply Technical Analysis to investing/trading decision making.
4. Assess the risk for specific loss amount based on Technical Indicators.
5. Perform calculation of the Simple Moving Average (SMA).
6. Apply Technical Indicators on the Price chart of a Trading Platform.
7. Speculate the future price moves based on Technical Indicators i.e. SMA.

Learning Area: Attitudes

1. Judge whether a Technical Indicator is appropriate to use during a specific period.
2. Judge whether Lagging or Leading Indicators is appropriate to use at certain cases.

3. Defend calculations done regarding key amounts in Trading Account Details.
4. Present potential strategies based on Technical Analysis and Indicators.
5. Defend investment/trading decisions with justifiable metrics combined with Technical Analysis.

3. Time Schedule of INTERMEDIATES: ONLINE TRADING PLATFORMS AND TECHNICAL ANALYSIS

UNIT 1: Investing/Trading Account (2 Hours)

1.0. Introduction and Meeting (10m)

- Meeting with Attendees-Icebreaker
- Presentation of purpose and targets of the unit
- Contract of Commitment

1.1. Investing/Trading Account Types (25m)

(Explanation of why Brokers offer different account types, the intentions behind the diversification and what client needs are met.)

- Lecture – Account Types
- Brainstorming
- Worksheets-Team Exercise
- Discussion

> Break (15m)

1.2. Balance and Equity (45m)

(Explanation of how the Trading Account variables are connected and how to calculate each variable based on simple equations.)

- Lecture – Connection between Balance, Equity and Profitability.
- Worksheets-Team Exercise
- Questions and Answers
- Discussion

> Break (15m)

1.3 Leverage and Margin (15m)

(Reference to the Terms Margin and Leverage. Explanation of how these 2 features are connected and the risk involved when used.)

- Lecture- Margin Account and Leverage Usage
- Worksheets-Team Exercise
- Questions and Answers

1.4 Margin Level and Stop Out (15m)

(Reference to the term Margin Level and how this affects the account when there are not sufficient funds to keep positions open. Reference to the term Stop Out and what happens to the existing open positions when it triggers.)

- Lecture- Required Funds, Free Margin and Stop Out Level
- Worksheets-Team Exercise
- Questions and Answers
- Discussion

Closing of Unit 1 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

UNIT 2: Online Investing/Trading Platforms (2 Hours)

2.1. Metaquotes and Metatrader (35m)

(Reference to famous companies who create Investment/Trading Platforms and the Financial Software Developers, the market participants. Explanation of the nature of these platforms and its use for an investor or speculator.)

- Lecture - Developers of Financial Trading Software
- Questions and Answers
- Lecture – Online Trading Platform and Usage
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (10m)

2.2. Platform Access (35m)

(Explaining the types of access to a Trading Account. Master vs Investor Access and related restrictions.)

- Lecture- Types of Access to a Trading Account
- Worksheets-Team Exercise
- Questions and Answers
- Discussion

> Break (10m)

2.3. User Interface (45m)

(Referring to the essential features of the Investment/trading Platforms. Showing the Terminal Feature's basic tabs that show essential information about the account and the interaction of the user with the platform.)

- Lecture- Essential Platform Features
- Questions and Answers
- Lecture- Terminal's Basic Tabs
- Worksheets-Team Exercise
- Questions and Answers
- Discussion

Closing of Unit 2 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

UNIT 3: Trading Operations (2 Hours)

3.1. Trading Order Types (40m)

(Explaining how a position opens and the types of orders that can be sent for execution to the Broker. Reference to the different categories of orders and their differences.)

- Lecture: Position Opening and Types of Orders
- Questions and Answers
- Worksheets-Team Exercise
- Lecture: Market Orders and Pending Orders
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (15m)

3.2. Order Modifications (40m)

(Explaining how the users can modify existing orders and positions.)

- Lecture: Modifying Open Positions
- Questions and Answers
- Lecture: Modifying Pending Orders
- Questions and Answers
- Worksheets-Team Exercise
- Questions and Answers

> Break (15m)

3.3. Automated Trading (30m)

(Reference to the term Expert Advisor and explaining how a user can use the features of the platform allowing for automated trading and strategy testing.)

- Lecture: Trading with Expert Advisors/Robots
- Questions and Answers
- Discussion

Closing of Unit 3 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

UNIT 4: Price Charts (2 Hours)

4.1. Chart on Trading Platform (25m)

(Reference to the Price Charts and their features. Explanation of the key elements and how they are formed.)

- Lecture – Chart Features
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (15m)

4.2. Types of Charts (35m)

(Reference to the types of charts available on the platforms, their differences and why the Candlestick Chart is preferred. Explanation of how the Candlestick is formed and what are its parts.)

- Lecture – Price Data forms
- Questions and Answers
- Lecture – Candlesticks
- Worksheets-Team Exercise

> Break (15m)

4.3. Timeframes (30m)

(Reference to what are Timeframes and the role they play on Chart Formation and Candlestick Formation.)

- Lecture – Timeframes and Candlestick Formation
- Questions and Answers

- Worksheets-Team Exercise

4.4. Chart Properties (20m)

(Reference to the available chart properties that can be modified and the objects, tools, that can be used on the chart for analysis and convenience.)

- Lecture – Objects on Charts and Properties
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

Closing of Unit 4 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

UNIT 5: Price Patterns (2 Hours)

5.1. Introduction to Price Patterns (35m)

(Reference to the term Price Pattern and explanation of why they are important to Technical Analysis. Explanation of the most famous simple patterns such as Support and Resistance.)

- Lecture – Technical Analysis and Patterns
- Questions and Answers
- Worksheets-Team Exercise
- Lecture – Support and Resistance
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (15m)

5.2. Trendlines and Breakouts (15m)

(Reference to the term Trend and Breakout. Explanation of when the price follows a trend and when it causes a break upwards or downwards.)

- Lecture – Trend Lines
- Questions and Answers
- Lecture – Breakouts
- Worksheets-Team Exercise
- Discussion

5.3. Reversals and Retracements (20m)

(Reference to the terms Reversals and Retracement. Explanation of the differences between the two and reference to when they are applied in combination with an indicator.)

- Lecture – Reversals vs Retracements
- Questions and Answers
- Lecture – Fibonacci Retracement Levels
- Worksheets-Team Exercise
- Discussion

> Break (15m)

5.4. Continuation Patterns (20m)

(Reference to the Continuation Patterns such as Triangle, Pennant, Wedge, Rectangle and the direction the price is expected to take. Reference to the Fibonacci Retracement Levels and their importance.)

- Lecture – Triangle, Pennant, Wedge, Rectangles Patterns
- Questions and Answers
- Lecture – Fibonacci Retracement Levels
- Worksheets-Team Exercise
- Discussion

5.5. Formations and Patterns (20m)

(Explanation of formations taking place in historical data such as Price Channels, Double-top, Double-bottom and Head and Shoulders. They are treated as patterns as well.)

- Lecture – Price Channels, Double-top, Double Bottom, Head and Shoulders
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

Closing of Unit 5 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

UNIT 6: Essential Technicals (2 Hours)

6.1. Types of Technical Indicators (35m)

(Reference to the types of Technical Indicators, Price indicators and Oscillators and to their important difference.)

- Lecture – Price Indicators and Oscillator Indicators
- Questions and Answers

- Worksheets-Team Exercise
- Discussion

> Break (10m)

6.2. Crossovers (35m)

(Explanation of how the indicators such as Moving Averages can cross each other creating a signal for Buy or Sell.)

- Lecture – Types of Crossovers
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (10m)

6.3. Divergence (40m)

(Reference to the term Divergence and how it can be used to predict future market move in combination with technical indicators. Explanation on what is Negative and what Positive Divergence and which provides a stronger signal.)

- Lecture – Positive and Negative Divergence
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

Closing of Unit 6 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

UNIT 7: Lagging Technical Indicators (2 Hours)

7.1. Leading and Lagging Indicators (10m)

(Reference to the terms Leading and Lagging Indicators. Explanation of their differences and under what circumstances each is used.)

- Lecture –Differences: Leading vs Lagging Indicators
- Questions and Answers
- Discussion

7.2. The Moving Average (20m)

(Explanation of how the Moving Average is calculated and used in Technical Analysis as an indicator. Reference to both Simple and Exponential Moving Averages.)

- Lecture –Simple and Exponential Moving Average
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (10m)

7.3. MA Convergence Divergence (20m)

(Reference to the MACD indicator and its features. Explanation on how it is constructed and how to use it along with Convergence/Divergence signals.)

- Lecture – MACD Lines and Crossovers
- Questions and Answers
- Lecture – MACD Buy and Sell signals
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

7.4. Average Directional Index (ADI) (15m)

(Reference to ADI indicator, how it is used to measure the strength of a trend and how it is applied to trend-trading strategies.)

- Lecture – Strength of Trend and Trend-Trading Strategies
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (10m)

7.5. Bollinger Bands (15m)

(Reference to the term Bollinger Bands and its use as an indicator. Explanation of the meaning of its 3 bands and what this indicator is measuring. Reference to the limits set by the user and the overbought/oversold territories formed that help the user to decide on the trade direction.)

- Lecture – Upper, Middle and Lower Bands
- Questions and Answers
- Lecture – Oversold and Overbought Territories
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

7.5. Parabolic SAR (15m)

(Reference to the term Parabolic and SAR. Explanation of the nature of this indicator and when it is more appropriate to use.)

- Lecture – Stop and Reverse Method (SAR)
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

7.6. Alligator Indicator (15m)

(Reference to term Alligator Indicator and its meaning. Explanation of how it is constructed using moving averages and how it is used.)

- Lecture – Three Smoothing Averages and Trading Signals
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

Closing of Unit 7 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

UNIT 8: Leading Technical Indicators (2 Hours)

8.1. Relative Strength Index (RSI) (30m)

(Reference to the term RSI and explanation of its type of indication. Reference to what is Momentum and the conditions under which the market is overbought or oversold according to the RSI.)

- Lecture – Momentum and Overbought/Oversold Conditions
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

> Break (15m)

8.2. Stochastic Oscillator (30m)

(Reference to the term Stochastic and how this indicator is used based on Momentum. Reference to the conditions under which the market is overbought or oversold according to Stochastic. Explanation of the differences between Stochastic and RSI.)

- Lecture – Momentum and Overbought/Oversold Conditions
- Questions and Answers

- Lecture – Differences between RSI and Stochastic
- Questions and Answers
- Discussion

> Break (15m)

8.3. Commodity Channel Index (CCI) (20m)

(Reference to the term CCI and how it used. Explanation of the differences between Stochastic and CCI.)

- Lecture – CCI and Emerging Trends
- Questions and Answers
- Lecture – CCI vs Stochastic
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

8.4. Accelerator Oscillator (20m)

(Reference to the term Accelerator Oscillator and how it is used. Explanation of its main characteristics: measurement of Acceleration and Deceleration and tracking of Momentum.)

- Lecture – Acceleration and Deceleration
- Questions and Answers
- Lecture – Changes in Momentum
- Questions and Answers
- Worksheets-Team Exercise
- Discussion

Closing of Unit 8 (10m)

- Summary Report of knowledge and skills acquired
- Conclusions
- Evaluation: Program, Trainer and Conducting Conditions

Final and Closing Meeting (1 Hour)

- Summary: Report of acquired knowledge and skills.
- Conclusions: Linking goals to work area.
- Evaluation: Program, Trainer and Conducting Conditions

4. Research Tool for Individual Training Needs

The individual needs survey will be conducted using a questionnaire (**Annex 1**). The questionnaire aims to investigate the demographic, social, educational, professional, and special characteristics of the trainees. It explores the knowledge, skills and needs of each trainee in the field of education, previous

work experience, their learning motivations and collects information on the areas that need further training and support. With this approach the program will be configured and adapted effectively.

5. Icebreaker of Unit 1 (10m)

The purpose of the Ice Breaker is to help us all get to know each other better and to make everyone feel more comfortable, so that it is easier for trainees to learn. The training technique that I will include in the icebreaker is the brainstorming with a differentiation. I will write a particular phrase on the board and ask the trainees to join groups of 2, get to know each other and think of writing on their worksheet 3 words that come to mind about this phrase. Then they will come to the board one after the other, will introduce themselves and will mark with a marker the words they have thought of, without exclusions, at the same time explaining their thought. The purpose of the process is to cultivate critical thinking, the exchange of ideas, the mapping of the subject, the grouping of ideas and the enlightenment of the aspects of the subject.

6. Program Learning Methods

- a) In-person training so that there is direct contact and better communication.
- b) Learning through mobile telephony (Searching for valid information, building attitudes and teamwork, opposing views with evidence that supports them).

7. Program Learning Techniques

a) Lecture / Presentation

This technique refers to concepts of the teaching unit and at the same time uses slides that will help the trainees to understand them.

b) Questions – Answers

For active participation of trainees and formative evaluation during the unit.

c) Brainstorming

An open activity that will give the opportunity for all trainees to take part, to make it possible to record ideas / opinions, to see conflicting views and to create categories of topics.

c) Work sheets in teams

The trainees will be divided into groups of 2 and will work on an exercise that will motivate the trainees to use the new knowledge to evaluate situations related to the topic and will help to achieve the learning objectives. There will thus be an opportunity for cooperation, exchange of ideas and experiences, encouragement of expression and friendship among the trainees.

8. Program Learning Means

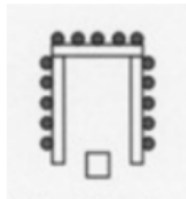
1. **Computer** for the use of presentation software.
2. **Microsoft PowerPoint** presentation software.
3. **Educational manuals** that have content for reading and Worksheets.
4. **Projector** to be used for presentation.
5. **Learning Board** on which the topics discussed in the course will be listed.

9. Program Learning Materials

1. **USB Digital Data Storage Device.** It contains the training material that will be used for the presentation of Microsoft PowerPoint media.
2. **Markers.** Will be used by trainees in different colors to help categorize information during the icebreaker.
3. **Stationery.** So that trainees can fill in the worksheets.
4. **Clicker control.** For changing the slides of the presentation.

10. Training Venue Layout

Rectangular Shape Π layout to provide an opportunity for interpersonal communication, to create a climate of teamwork between trainees and to create an easy and direct approach by the trainer.



11. Type of Evaluation

1. The type of evaluation to be used in the section is the **Final / Report Evaluation**. It will be conducted at the end of the module in order to assess whether the objectives and purpose of the module have been achieved. The trainer and the training area are also evaluated (**Annex 3**).
2. **Formative Evaluation** will be conducted during the unit through the questions / answers, discussion and generally through the interaction of the trainees and through the exercises that take place after the

end of the lecture with the completion of the teaching for application, practice and learning of new knowledge and skills.

12. Evaluation Axis

1. **Training content:** ask questions about the content offered, whether the objectives have been achieved and reference to points that need improvement.
2. **Trainer:** if he / she has sufficient knowledge, if he / she used appropriate methods, if he / she had contagion, good communication and if the educational material he / she used was complete and up to date.
3. **Training space and conditions:** if the space was easily accessible and suitable, if the layout was comfortable, if the necessary means were available and sufficient and if the conditions were satisfactory.
4. **Trainees:** If there was a response and receptivity, friendliness, and cooperation from the trainees and if the learning objectives have been achieved.
5. **Organization of training:** if the communication with the organization providing the training was satisfactory, if the time and frequency of breaks were satisfactory if it had sufficient training material as well as if there was a suitable structure.

13. Program Evaluation Tools

- **Questionnaire (Annex 3)** that will be examined and will assess the satisfaction of trainees from the program.
- **Quiz-Diagnostic Essay (Annex 2)** which will show the effectiveness of the program in achieving the learning objectives.
- **Activities / practical exercises** for the application of new knowledge during the program.

14. Program Evaluation Techniques

- **Quiz-Written Examination (Annex 2).**
- Final Evaluation-Distribution of the **questionnaire (Annex 3).**
- **Observation**, throughout the course, work test and feedback.