THE 9-TO-5 TRADER

Starter Kit

The printable tools from the book. Plan, size, journal, repeat.

Gabriele Nigro

gabrielenigro.com

START HERE

How to Use This Kit

This kit is the working end of The 9-to-5 Trader: the four tools the book builds, ready to print and fill in. Each one maps to a chapter, so if something here is unfamiliar, the chapter reference tells you where the full explanation lives.

1. **The One-Page Trading Plan** — Chapters 3 to 11

   Your entire trading life on one sheet. Fill it in as you work through the book's action steps, sign it, and put it where you run your Sunday session.

2. **The Position Size Cheat Sheet** — Chapter 6

   The formula and three worked examples. Keep it next to the laptop until the math is automatic.

3. **The Five-Minute Journal + Monthly Review** — Chapter 9

   The seven columns, the rules of honest scoring, and the five monthly questions. Copy the layout into a spreadsheet, or print and write.

4. **The Weekly Routine Checklists** — Chapter 7

   Sunday, weeknight, and Friday, step by step. Print one and keep it visible until the routine stops needing it.

One rule before you print anything

These tools only work filled in, in writing, while you're calm. A plan kept in your head is a mood; a plan on paper is a system. Ninety minutes a week, no decisions during market hours, and let the paperwork do the remembering.

TOOL 1 OF 4

The One-Page Trading Plan

Fill in every blank in your own words. This document outranks the book.

1 | WHY I TRADE

2 | YEAR ONE IS SUCCESSFUL IF

Account roughly intact • Rule-follow rate above ____ % • All four equation terms at 7+

3 | MY STRATEGY, SIX RULES, MY OWN WORDS

Trend filter: ____________________

Setup: ____________________

Entry trigger: ____________________

Initial stop: ____________________

Exits: ____________________

Earnings rule: ____________________

All six rules frozen until (six months from first live trade): ____________________

4 | RISK RULES

Account size: ____________________ **1R =** ____________________ **(____ %)**

Shares = 1R ÷ (Entry - Stop). Always round down.

Max open positions: ____________

Position cap: no single position bigger than one-third of the account; everything together never more than the account itself. No margin.

Circuit breaker: minus 3R in one week = no new trades until Monday.

5 | ROUTINE, WITH REAL CALENDAR SLOTS

Sunday planning (45-60 min): ____________________

Evening check, Mon-Thu (10-15 min): ____________________

Friday close-out (15 min): ____________________

Golden rule: no decisions during market hours. Ever.

TOOL 1 OF 4

The One-Page Trading Plan, continued

6 | WHEN IT GETS LOUD: MY SCRIPTS

Losing streak: "Streaks are weather. My size was set for this. Same rules, same size, next valid setup."

Big winner: "One trade proves nothing. The win is the system working. Same rules, same size."

Missed move: "Missing a move costs me nothing. Chasing costs real R. Ticker goes to the Sunday note."

Firewall: Bad day at work or home = no new entries tonight.

7 | JOURNAL COMMITMENT

Every trade logged at the Friday session. Primary metric: rule-follow rate. Monthly review: last Friday, five questions, in writing.

8 | LAUNCH PHASES AND GATES

Phase 1 (weeks 1-4, size zero): start ________ passed ________

Phase 2 (weeks 5-8, 0.25-0.5% risk): start ________ passed ________

Phase 3 (weeks 9-13, 0.5% risk): start ________ completed ________

9 | GROWTH AND DEFENSE

Scaling gate: +0.25 points only after 6 months at current level, 90%+ rule-follow, positive R, decided at a scheduled review.

My lifetime risk ceiling: ____________

Drawdown ladder: -8% = half risk • -12% = no new entries + special review • -20% = full stop, one month off, complete audit.

Second strategy: not before 12 months at 90%+, and it enters through its own Phase 1.

This plan changes only at scheduled reviews, in writing, based on the journal.

Signed: ______________________________ **Date:** ____________________

TOOL 2 OF 4

Position Size Cheat Sheet

Shares = Risk amount (1R) ÷ (Entry price - Stop price)

Always round down

Step by step: 1R = account x risk % (0.5% while learning, 1% standard). Entry = your planned buy level. Stop = just below the pullback low. Divide. Round down. Done.

Example 1: the real book trade (AAPL, May '23)

Account $10,000 at 0.5% -> 1R = $50

Entry 173.95, stop 169.67 -> risk per share 4.28

$50 ÷ $4.28 = 11.7 -> 11 shares

Position about $1,913, a fifth of the account. At risk: about $47.

Example 2: the real book loser (MSFT, Dec '21)

Account $10,000 at 0.5% -> 1R = $50

Entry 335.85, stop 316.44 -> risk per share 19.41

$50 ÷ $19.41 = 2.57 -> 2 shares

Wide stop means few shares, automatically. Stop-out cost: about $39.

Example 3: the trade that doesn't fit

Account $10,000 at 0.5% -> 1R = $50

Entry $800, stop $765 -> risk per share $35

$50 ÷ $35 = 1.4 -> 1 share, or skip if that overshoots

"This doesn't fit my account yet" is a professional sentence.

REMINDERS

- The stop goes where the setup says (below the pullback low), never where a bigger position would like it.
- The stop is a real order, placed the moment the entry fills. A stop in your head is not a stop.
- Sum of all open risk stays at or below max positions x 1R.
- Position cap: no single position bigger than one-third of the account; all positions together never more than the account itself (no margin). When formula and cap disagree, the cap wins.
- While learning: 0.5% risk, 2 to 3 positions max. Size grows only through the book's scaling gate, never by feel.

TOOL 3 OF 4

The Five-Minute Journal + Monthly Review

ONE ROW PER TRADE, SEVEN FIELDS

#	FIELD	EXAMPLE
1	**Date(s) + ticker**	26 May-4 Aug '23, AAPL
2	**Setup**	20 EMA pullback
3	**Entry / Stop / Exit**	173.95 / 169.67 / 182.51 + 20 EMA exit
4	**Size + 1R**	11 sh, 1R = $50
5	**Result in R**	+2R half, +2.7R half
6	**Rules followed**	YES / NO. Binary. No "mostly".
7	**One-line lesson**	"Followed plan; loss was weather."

RULES OF THE JOURNAL

- Filled in at the Friday session. "Nothing notable" is a legal lesson.
- Any improvisation = NO, even if profitable. Especially if profitable.
- Missed a week? Reconstruct from broker history, mark the gap, continue.
- Rule-follow rate = YES ÷ total. Year-one target: above 90%.

MONTHLY REVIEW: LAST FRIDAY, 30 MINUTES, IN WRITING

1. What was my rule-follow rate? (compare to last month)
2. What did my NO trades have in common?
3. Did every trade risk the same fixed amount?
4. What was my result in R, and does it look like weather or like signal?
5. **What ONE thing gets extra attention next month?**

TOOL 4 OF 4

The Weekly Routine Checklists

SUNDAY PLANNING — 45-60 min

- [ ] Market weather: S&P below its 50 SMA with the 20 EMA below the 50 = no new entries this week.
- [ ] Sweep the watchlist. Sort: not qualifying / trending-no-setup / candidate.
- [ ] For each candidate write 4 numbers: trigger, stop, 1R, size. Plus one date: earnings (within 5 days = out).
- [ ] Open positions: 2R reached? Trail vs the 20 EMA? Adjust orders.
- [ ] Close the laptop. Thinking is done until tomorrow evening.

EVENING CHECK, MON-THU — 10-15 min

- [ ] Any candidate close above its trigger? Place order with stop attached, Sunday's numbers.
- [ ] Open positions: resting limit banked the 2R half = stop to breakeven. Close below 20 EMA = sell at next open. Earnings within 5 days and short of 2R = exit.
- [ ] Update candidate triggers with today's highs. Delete broken candidates.
- [ ] New tickers heard today go to the Sunday note. Never tonight.
- [ ] Close the laptop, even if (especially if) you feel like browsing.

FRIDAY CLOSE-OUT — 15 min

- [ ] Journal every trade opened or closed this week.
- [ ] Score the week: rule-follow YES count. Any workday peeking?
- [ ] Note tickers and next week's oddities for Sunday.
- [ ] Last Friday of the month: run the five-question review.

> **STANDING RULES**
> No decisions during market hours. Orders do the daytime work.
> Bad day at work or home = no new entries tonight.
> Minus 3R in one week = benched until Monday.
> Missed one evening check? Catch up tomorrow. Never compensate by phone-checking at work.