

SMART ALPHA INVESTOR

Website Navigation Guide

Quick guide to SAI tabs, guest vs logged-in features, watchlists, refresh controls, mobile use, and layouts.

Version: v4.7 Public Guide Pack
Website: wealth.amtechlabs.com

Educational and platform-use guide. This guide does not provide financial, tax, or legal advice and does not guarantee investment results.

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Top-Level Navigation

Signals	Symbol cards, Simple/Pro, watchlist, refresh controls.
Today's Plan	Market regime, risk, live update, weekly positioning.
Income	CSP/CC tools and candidate views.
Investing	ETF/DCA/family investing guidance.
News & Learning	Market news and education content.
Guide	Public user manuals and future help center.

Watchlists and Symbols

- Guest users may see a public/default watchlist template.
- Logged-in users can customize their own watchlist when enabled.
- Search/Add areas help locate and add symbols.
- CSP/CC labels identify options-income strategy eligibility.

Refresh Controls

Auto Refresh	Updates on the platform schedule, such as 15 minutes when supported.
Refresh All	Refreshes market/symbol data together.
Individual Refresh	Refreshes one symbol card without reloading everything.
Timestamp	Use to know if the card is fresh or stale.

Mobile Use

- Use Simple view for fast card scanning.
- Use Pro view only when you need details.
- Floating/pill navigation may wrap to keep buttons visible.
- Avoid making fast trading decisions from a single field on a small screen.

Guest vs Logged-In

Feature	Availability	Customizable
Guide PDFs	Available	Available
Public template watchlist	Available	Available/customizable if supported
Personal watchlist	Locked or limited	Available
Pro view	May be locked	Available if enabled
Saved preferences	Limited	Available

Navigation Rule

Start with Today's Plan, then review Symbol Cards, then use Income/Investing/News/Guide as needed. This keeps decisions aligned with market context.