

Institutional Access Terms — EngineerTrade.io

1. Positioning

EngineerTrade.io provides descriptive, rules-based research overlays using the Gemstone & Moon Framework. Materials classify tone, regime, and cycle behavior retrospectively. No forecasts, signals, timing guidance, or allocation instructions are provided.

2. Non-Advisory Nature

All materials are strictly non-advisory. Nothing constitutes investment advice, portfolio management, execution guidance, or solicitation.

3. Coverage Expectations

Investment Committee License: ~8–12 core names.

Platform License: ~20–30 platform names.

Enterprise License: firm-wide internal names and teams.

4. Delivery Cadence

Weekly annotated overlays, with inter-period updates when conditions meaningfully shift. Delivery to one designated institutional inbox; internal redistribution allowed per license.

5. Internal Usage

Materials may be used for CIO, PM, Risk, Research, or IC documentation. Approved for internal governance, narrative alignment, and meeting materials.

6. Restricted Usage

Not for retail distribution. Not for public posting. Not for performance marketing. Not to be used as trade signals or execution triggers.

7. Compliance Integration

Institutional teams may integrate overlays into:

- IC decks
- Weekly PM meetings
- Risk oversight reviews
- Internal research commentary

8. Distribution Rights

IC License: single team.

Platform License: multiple PMs/desks.

Enterprise License: firm-wide distribution.

9. Deliverables

Annotated PNG overlays and optional quarterly descriptive summaries. No models, backtests, forecasts, or predictive analytics are provided.

10. Methodology Confidentiality

Methodology and proprietary cycle markers remain confidential. Recipients may not reverse-engineer or redistribute the framework.