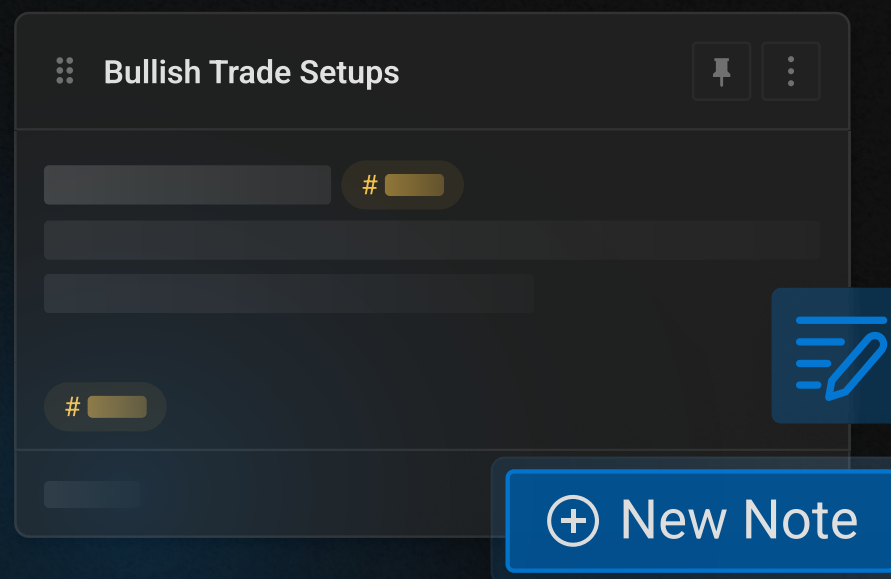


NOTES







Capture the Thinking Behind Every Trade



Don't Just Track Trades, Track Decisions

Trading platforms show what happened, but not why decisions were made. Without a structured way to capture reasoning, insights get lost, patterns go unnoticed, and users struggle to improve over time.

Features

-  Symbol-Based Note Tagging
-  Advanced Search Across, Notes, Titles, & Categories
-  Date, Category, and Symbol Filtering
-  Drag-and-Drop Custom Ordering
-  Inline Editing for Notes and Categories
-  Lightweight Text Formatting

Add Structure to How Decisions Are Captured

The Notes Module is built directly into the trading workflow, allowing users to capture context from market activity without breaking their flow. By keeping notes tied to market activity, platforms give users context they can actually revisit and learn from.

A Smarter Way to Track Trading Decisions

Get a structured system with the Notes Module that gives users a new way to build their decision history over time and turn it into something reviewable and improvable. By connecting notes to symbols and categories, it becomes easier to identify patterns and make more consistent decisions.

Who's it for?

Active Traders

Track decisions and spot patterns across trades.

Independent Investors

Capture insights while analyzing markets.

Brokerages and Financial Institutions

Increase engagement by keeping user decisions in-platform.

Portfolio Managers

Document research and decisions tied to specific securities.

Digital Trading Platforms

Embed decision tracking directly into workflows.

Fintech Providers

Deliver built-in decision tracking without external tools.

Core Product Components



Symbol-Linked Notes

Keep every decision tied to the exact symbol and moment it was made.



Search and Retrieval Engine

Find notes across titles, content, categories, and symbols without losing context.



Filtering System

Narrow notes by symbol, category, or date to quickly revisit relevant decisions.



Flexible Organization Layer

Reorder notes and manage categories to reflect how users think and analyze markets.



Inline Editing Experience

Create and update notes directly within the workflow without interruptions.



Persistent Note History

Maintain a structured record of decisions that can be reviewed and refined over time.



Contact QuoteMedia

If you want to explore more about what QuoteMedia's Notes Module can do for you and your team, feel free to reach out to us today to learn more!

Call Toll Free: 1-844-485-8200

Outside North America: 1-250-586-9943

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