



PROPOSAL • 2026 EDITION • CONFIDENTIAL

The complete white-label trading *stack*.

Launch a fully branded brokerage — CRM, client portal, trading platform, PAMM, copy trading and back office — without building a single system from scratch.

▲ FX ▲ METALS ◆ INDICES ▲ CRYPTO ◆ EQUITIES ▲ COMMODITIES ◆ CFDS

PREPARED FOR

**Prospective Brokerage
& Fintech Partner**

PREPARED BY

ZeroTrade
Infrastructure Provider

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— INSIDE THIS PROPOSAL

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A NOTE ON SCOPE

ZeroTrade is a technology and infrastructure provider. We do not offer trading services, investment advice, or fund management to retail clients. The operating business, its licensing and its end-client relationships remain entirely with you.

THE INFRASTRUCTURE LAYER

01

Introduction

ZeroTrade is a white-label technology provider built for brokers, fintech companies, prop trading firms, and businesses that want to launch or upgrade their own trading ecosystem — without building everything from scratch.

We provide the complete infrastructure layer required to operate a modern trading business under your own brand, license, compliance structure and client-facing model.

ZeroTrade does not provide trading services directly to retail clients. We are a technology and infrastructure provider for businesses that want to operate on their own terms.

OUR OBJECTIVE

To help brokers and fintech companies launch faster, manage clients better, and operate a professional white-label system under their own brand.

11+

CORE
MODULES

1

UNIFIED
SYSTEM

100%

WHITE-LABEL

THE COMPLETE STACK INCLUDES

■ Broker CRM

■ Client portal

■ Trading platform

■ Admin back office

■ PAMM software

■ Copy trading software

■ IB & affiliate management

■ KYC & onboarding workflow

■ Deposit & withdrawal

■ Reporting & controls

■ Mobile application package

■ Branding & configuration

— ONE READY-TO-BRAND SYSTEM

02

About ZeroTrade

ZeroTrade is a complete white-label trading infrastructure solution for businesses that need a reliable, scalable and cost-effective system. Instead of spending months — or years — building CRM, client portal, trading interface, IB tools, PAMM systems, copy trading modules, admin panels and reporting dashboards separately, ZeroTrade provides a ready-to-use structure.

Every layer can be branded and configured to match your business model, from day one. A trading business needs a dozen systems working as one. ZeroTrade ships them as a single, configurable platform — so you compete on brand and service, not on engineering.

— BUILT FOR

01

New brokerage companies

02

Brokers upgrading technology

03

Prop trading firms

04

Introducing broker networks

05

Fund managers

06

Copy trading businesses

07

Fintechs entering trading

08

Branded trading ecosystems**WHY IT MATTERS**

A trading business needs a dozen systems working as one. ZeroTrade ships them as a single, configurable platform — so you compete on brand and service, not on engineering.

SEVEN OPERATING MODULES

03

Scope of Services

ZeroTrade provides a full white-label CRM and trading platform environment covering the main operational needs of a broker or trading business.

3.1 • CENTRAL OPERATING SYSTEM

White-Label Broker CRM

The CRM is the central operating system for managing clients, leads, deposits, withdrawals, KYC, IBs, accounts, reports and internal teams — the complete client lifecycle, from first registration to active account management, with role-based access and a full audit trail.

— Lead management

— Client registration

— Client profile management

— Account creation

— KYC document upload

— Compliance review workflow

— Deposit request management

— Withdrawal request management

— Internal notes

— Client status tracking

— Sales team assignment

— Support ticket tracking

— Admin activity logs

— Client communication records

— Reporting dashboard

3.2 • END-USER EXPERIENCE

Client Portal

A branded area where end users register, complete verification, manage accounts, submit requests and access trading tools — carrying your logo, colours and company identity.

- | | |
|----------------------|--------------------------|
| — Client login | — Transaction history |
| — Profile dashboard | — Trading account access |
| — KYC upload | — Support tickets |
| — Account overview | — IB referral tracking |
| — Deposit request | — PAMM participation |
| — Withdrawal request | — Copy trading access |

3.3 • BRANDED TRADING EXPERIENCE

Trading Platform

A white-label trading interface configured around your liquidity setup, data provider and operational structure — delivered as a technology solution.

▲ EUR/USD ▲ XAU/USD ◆ US500 ▲ BTC/USD ▼ NAS100 ▲ GBP/JPY ◆ WTI

- | | |
|-------------------------------|--------------------------------|
| — Web-based trading interface | — Balance & equity display |
| — Market watch | — Instrument categories |
| — Charting interface | — Trading account dashboard |
| — Order placement | — Real-time / API data support |
| — Trade history | — Admin-side trade visibility |
| — Open positions | — Configurable instrument sets |

3.4 • MANAGED ACCOUNTS

| PAMM Software

For brokers supporting managed account structures — suited to firms working with fund managers, portfolio managers or managed trading models.

- | | |
|------------------------------|-------------------------|
| — Money manager profile | — Investor dashboard |
| — Investor allocation | — Admin monitoring |
| — Performance tracking | — Account-level reports |
| — Profit & loss distribution | — Allocation management |
| — Manager commission setup | — Risk control settings |

3.5 • SOCIAL & COPY

| Copy Trading Software

Trader-following functionality that lets you build a social or copy trading environment under your own brand.

- | | |
|--------------------------|-----------------------------------|
| — Master trader profiles | — Subscription / commission setup |
| — Follower accounts | — Risk settings |
| — Copy ratio settings | — Follower control panel |
| — Performance dashboard | — Admin monitoring |
| — Trader ranking | — Trade copy activity reports |

REVENUE BEYOND SPREADS

PAMM and copy trading open management fees, performance fees and subscription revenue — turning your platform into a marketplace, not just an execution venue.

3.6 • GROWTH THROUGH PARTNERS

| IB & Affiliate Management

Tools to grow through partners, introducers and referral networks — with transparency and control across multi-level structures.

— IB registration

— IB hierarchy

— Sub-IB structure

— Referral links

— Client mapping

— Commission tracking

— Commission reports

— Partner dashboard

— Admin approval system

— Multi-level IB structure

— Manual / automated commission

— Sub-partner visibility

3.7 • FULL OPERATIONAL CONTROL

| Admin Back Office

Complete control for your internal team — designed to reduce manual work and give management visibility across the entire business. Seven modules, one back office.

— User management

— Client management

— KYC review

— Deposit approval

— Withdrawal approval

— IB management

— PAMM management

— Copy trading management

— Account monitoring

— Team access roles

— Reports & logs

— System & branding settings

 YOUR BRAND, END TO END

04

Branding & White-Label Setup

ZeroTrade can be provided entirely under your own brand name — so the platform looks and feels like your own technology ecosystem. Every surface your clients touch — portal, CRM login, trading platform, mobile app and emails — carries your identity, not ours.

100%

WHITE-LABELLED

1

CUSTOM DOMAIN

 WHITE-LABEL BRANDING MAY INCLUDE

☐ Company logo

☐ Brand colours

☐ Custom domain or subdomain

☐ Branded client portal

☐ Branded CRM login

☐ Branded trading platform UI

☐ Branded mobile app, if selected

☐ Custom email identity

☐ Basic UI customisation

THE GOAL

Every surface your clients touch — portal, CRM login, trading platform, mobile app and emails — carries your identity, not ours.

TWO PRODUCT LINES • FIVE PACKAGES

05

Package Options & Pricing

Each package carries a one-time setup fee and a flat monthly fee, billed every 30 days. Choose a fully branded platform, or a CRM & management layer for an existing MetaTrader 5 setup.

LINE A

White-Label Platform

Your own branded brokerage — portal, trading platform and CRM, end to end.

ZeroTrade Lite

Turnkey solution for the start-up broker — CRM, trading platform & IB, ready to launch.

USD **1,499** / MO

SETUP USD 1,000 • ONE-TIME

- + Broker CRM & client portal
- + White-label trading platform
- + IB & affiliate management
- + Deposit / withdrawal + reporting
- PAMM & copy / social trading

DEL. **2—3 DAYS**

KYB DOCS

MOST COMPLETE • WEB + APP

ZeroTrade TurnKey + Mobile App

Complete turnkey ecosystem across web and mobile — fully branded, end to end.

USD **2,500** / MO

SETUP USD 2,500 • ONE-TIME

- + Everything in ZeroTrade Lite
- + PAMM + copy / social trading
- + Branded mobile application
- + IB & affiliate management
- + App branding & deployment

DEL. **3—5 DAYS**

KYB DOCS

HOW TO READ THESE

Setup is a single onboarding charge; the monthly fee is billed every 30 days and renews on a 30-day cycle. Optional add-ons and third-party integrations are quoted separately by scope.

LINE B
MT5 CRM Solutions

A CRM & management layer for brokers already running on MetaTrader 5.

ZeroTrade CRM Solution

CRM services for MT5 — includes PAMM and IB.

USD **1,000** / MO

SETUP USD 1,000

- + CRM services for MT5
- + PAMM software
- + IB & affiliate management
- + Client & account management

DEL. **4 DAYS** NDA + AGR.

MT5 Manager & ZeroTrade CRM

MT5 Manager + CRM, provisioned for up to 500 accounts.

USD **3,000** / MO

SETUP USD 3,000

- + MT5 Manager access
- + ZeroTrade CRM
- + Up to 500 accounts
- + Client & account management

DEL. **3—4 DAYS** KYB + DOMAIN

COMPLETE MT5 BUNDLE

MT5 Manager + CRM • PAMM & Social

The complete MT5 bundle — Manager, CRM, PAMM and social / copy.

USD **3,500** / MO

SETUP USD 1,500

- + MT5 Manager + ZeroTrade CRM
- + PAMM software
- + Social / copy trading
- + IB & affiliate management

DEL. **3—4 DAYS** KYB DOCS

CHOOSING A LINE

Line A delivers a fully branded brokerage from the ground up. Line B layers ZeroTrade's CRM, PAMM, IB and management tools onto an existing MetaTrader 5 environment — ideal for brokers already live on MT5 who want a stronger operational and client-management layer.

PRICED BY SCOPE

06

Optional Add-Ons

Additional modules can be layered on depending on your business requirements. Final pricing depends on scope, complexity and required third-party integrations.

Custom payment gateway

Crypto payment gateway

Liquidity provider integration

Advanced reporting

Custom dashboard

Multi-branch management

Multi-manager access

Advanced IB hierarchy

Advanced risk settings

Custom CRM workflow

Custom onboarding forms

Dedicated support desk

Mobile app customisation

Third-party API integration

Custom domain & email setup

YOU OPERATE THE BUSINESS

07

Client Responsibilities

ZeroTrade provides the technology infrastructure. You remain responsible for business operations, regulatory obligations, client agreements, compliance decisions and the end-user relationship. To begin, you provide:

Company branding & logo files

Business email details

Liquidity / market-data provider

KYC / KYB policy, if required

Regulatory approvals / licenses

Domain or subdomain

Payment provider details

Legal & compliance documents

Privacy Policy & T&Cs

App store developer accounts

TECHNOLOGY PROVIDER ONLY

08

Compliance Disclaimer

IMPORTANT

ZeroTrade does not provide investment advice, brokerage services, fund management, portfolio management, financial promotions, or direct trading services to retail clients. The client must ensure its business model, onboarding, marketing, payment flows and trading operations comply with the laws of the jurisdictions in which it operates. All licenses, approvals, client agreements, risk disclosures and regulatory permissions must be obtained and maintained by the client.

SIX STAGES TO GO-LIVE

09

Implementation Timeline

01

Requirement Review

We review your business model, selected package, branding needs and required modules.

02

Branding & Configuration

The platform is configured with your logo, brand colours, domain, CRM and portal access, and user roles.

03

Module Setup

Required modules are activated — CRM, trading platform, PAMM, copy trading, IB system and client portal.

04

Integration Setup

Third-party integrations are reviewed and configured based on API availability and technical feasibility.

05

Testing

You review the CRM, portal, trading platform, admin panel and selected modules before launch.

06

Go-Live

After testing and approval, the platform is prepared for live usage under your own brand.

BY PACKAGE

10

Support & Maintenance

ZeroTrade provides technical support and maintenance based on the selected package. Any custom development, new module request or third-party integration beyond the agreed scope may be charged separately.

■ Platform setup support

■ Technical issue review

■ Basic training

■ Admin guidance

■ Module configuration

■ Bug review

■ System updates

■ Integration support

■ Maintenance windows

AT A GLANCE

11

Commercial Summary

PACKAGE	LINE	SETUP	MONTHLY	DELIVERY
ZeroTrade Lite <i>CRM, trading platform & IB — no PAMM / copy</i>	PLATFORM	1,000 USD	1,499 USD	2—3 days
ZeroTrade TurnKey + App <i>Full ecosystem — PAMM, copy & mobile app</i>	PLATFORM	2,500 USD	2,500 USD	3—5 days
ZeroTrade CRM Solution <i>CRM for MT5 — includes PAMM & IB</i>	MT5 CRM	1,000 USD	1,000 USD	4 days
MT5 Manager & ZeroTrade CRM <i>MT5 Manager + CRM — up to 500 accounts</i>	MT5 CRM	3,000 USD	3,000 USD	3—4 days
MT5 Manager + CRM • PAMM & Social <i>Complete MT5 bundle — Manager, CRM, PAMM, copy</i>	MT5 CRM	1,500 USD	3,500 USD	3—4 days

ALL PRICES IN USD. SETUP IS A ONE-TIME CHARGE; MONTHLY FEE BILLED EVERY 30 DAYS ON A 30-DAY RENEWAL CYCLE. OPTIONAL ADD-ONS AND CUSTOM INTEGRATIONS ARE QUOTED SEPARATELY BASED ON SCOPE.

— ONE ECOSYSTEM

12

Why Choose ZeroTrade

One white-label ecosystem brings CRM, trading platform, PAMM, copy trading, IB management and back-office control together — instead of building each system separately.

01

Faster launch

02

Lower development cost

03

White-label branding

04

CRM + platform in one

05

PAMM & copy modules

06

Mobile app option

07

Scalable infrastructure

08

Flexible packages

09

Business-focused back office

— IN SUMMARY

13

Conclusion

MORE THAN SOFTWARE

ZeroTrade is not just a software provider. It is a complete technology layer for businesses that want to launch, manage and scale their own branded trading platform.

— READY WHEN YOU ARE

Let's launch your brand on *day one*.

Confirm your package, share your branding, and we'll configure your white-label environment through the six-stage implementation path to go-live.

SELECTED PACKAGE



ZEROTRADE LITE



TURNKEY + APP



CRM SOLUTION (MT5)



MT5 MGR + CRM



MT5 + PAMM & SOCIAL

AUTHORISED SIGNATURE

DATE