COMPLETE TRADER'S EDGE · FIELD GUIDE

Build a Trading Desk of Grok Bots

The four-seat AI desk for traders, with a full prompt library.

MIND · METHOD · MONEY

COMPLETETRADERSEDGE.COM

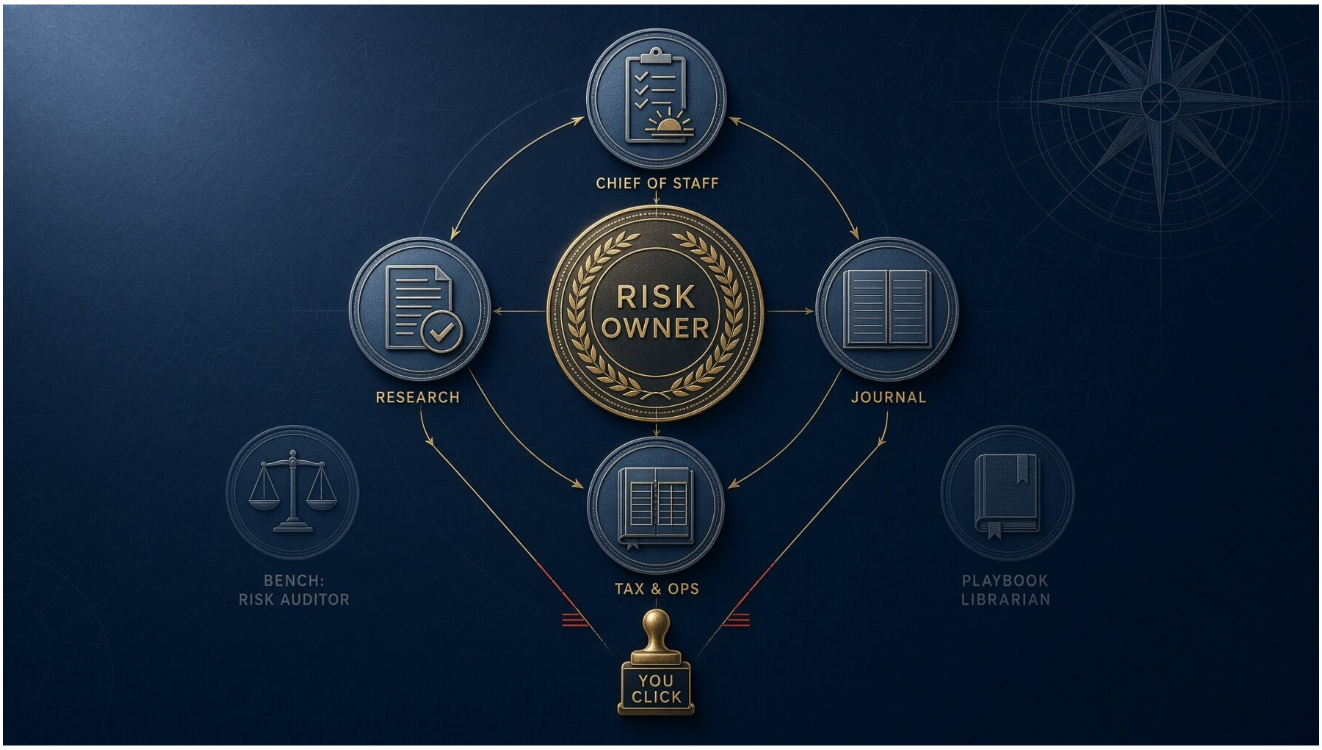
A desk, not an assistant

Four narrow bots, each with one job, one set of files, and a written list of things it is forbidden to do. None of them place a trade.

You already have an AI trading assistant. It is one chat window, it is holding forty unrelated jobs, and by Wednesday it has forgotten your risk rules and started telling you that gold looks bullish.

The fix is not a better prompt. It is a different shape. In an institution, the person who takes the risk is surrounded by people who do not: a risk officer, an analyst, a back-office clerk. None of them can put on a position. All of them can slow one down, or make the trader account for one. Retail traders have historically had none of this and have compensated by trying to be all of it at once, badly, at 06:40 with a coffee going cold.

That is what AI actually solves for a trader. Not signal generation. Staffing.



The desk. Four live seats, two on the bench, and one risk owner who is not a bot.

> **The one rule.** You remain the only person on this desk who can size, enter, or override. Everything in this guide is prep, records and review — the unglamorous three-quarters of the job that separates traders who compound from traders who have stories.

The roster

Four live seats mapped onto Mind, Method and Money. Two more on the bench for month two. Build fewer than you want to.

Seat	Job	Pillar	Never allowed to
Chief of Staff	Morning brief and end-of-day wrap. Calendar, open risk, trade or no-trade.	Mind + Money	Give you a bias
Research	Event map, catalyst file, what changed since your last session, source-tagged.	Method	Call direction
Journal	Post-session debrief in your template. Process grade separate from outcome.	Mind	Rewrite history
Tax & Ops	Lot tracking, fee log, prop payouts, year-to-date realised P&L by account.	Money	File anything
Risk Auditor *(bench)*	Weekly read of your trades against your written rules.	Money	Move a stop
Playbook Librarian *(bench)*	Retrieval only. Does this match Setup B, or am I forcing it?	Method	Invent a setup

Before you staff anything: the credential problem

Each Grok Bot runs on a persistent cloud computer with a real browser, filesystem and terminal, and it signs into tools using your own credentials. That is the product's whole pitch. The consequence, which xAI and independent reviewers both flag, is that files, browser sessions and command-line credentials on that machine can be reachable across your bot roster.

> **Non-negotiable.** Separate bots are **not** separate security boundaries. No bot ever gets your broker login, your exchange API keys, your prop firm dashboard password, or your bank. Not the Tax clerk. Not the Chief of Staff. You feed the desk exported files, never live access to money.

If a seat needs your account credentials to do its job, you have designed the job wrong.

Two ways to build it

There are two products with the word Grok on them and they are not the same thing. Pick the path that matches what you already pay for.

Path A · Grok Bot

Named, persistent agents, each with a cloud computer. They can run recurring routines, hold reusable skills, work in parallel and sit together in a channel, carrying on after you close your laptop and surfacing only when they need a decision.

There is no standalone Grok Bot subscription. Cursor's help pages state access is included with Cursor Pro, Pro+, Ultra or a Cursor Teams seat, or by linking an individual SuperGrok, SuperGrok Plus, SuperGrok Heavy or X Premium+ account. A free trial exists as a usage credit inside a seven-day window rather than a set number of days, so one long agent run can finish it.

> **Cost warning.** Usage is metered as a weekly allowance and overage is billed on model and token cost. Cursor's documentation states there is no Grok Bot-specific spend cap. For a desk firing a brief every weekday morning, that is the number to watch, not the subscription price. Start with one bot, measure a week, then scale.

The official guides have converged on a staffing pattern that transfers cleanly: one project equals one channel equals one roster. Reuse existing bots before creating new ones. Cap the channel around six, a manager plus five. Create a new bot only after you say yes. When a bot is stuck it marks the task Blocked and pings you rather than guessing.

Path B · grok.com Custom Agents and Workspaces

Most readers start here, because it needs no top-tier subscription. Four agent slots, each with its own name, role and instruction set, capped at roughly 4,000 characters. The path at the time of writing is profile icon, Settings, Customize, Create Agent.

Four slots, not six. That is exactly why this guide teaches four live seats: the roster was built to fit the tighter product, then extended for the roomier one. Use a Workspace to isolate your trading files, instructions and chat history from the rest of your life. Workspace instructions override your global custom instructions.

	Path A · Grok Bot	Path B · Custom Agents
Seats	About six per channel	Four
Bots talk to each other	Yes, in a shared channel	No. You are the switchboard
Scheduled routines	Yes	No. You open the chat
File isolation	Shared computer across the roster	Per Workspace
Start today?	Only on an eligible plan	Yes

A quiet advantage of Path B that nobody markets: because agents cannot pass work to each other, nothing happens on your desk without you moving it. For a trader, enforced friction between the research seat and the decision is a feature.

What you upload once

The desk is only as good as its files. Write these five before you create a single bot. They are short. Most traders have never written any of them down, which is itself the finding.

1. **Your playbook.** Each setup named, with entry criteria, invalidation, and the conditions in which it does not work. If you cannot name your setups, no bot will supply them.
2. **Your risk rules.** Max risk per trade, minimum reward-to-risk, max open correlated risk, daily loss limit, news blackout policy. One page. The desk enforces this document, so it has to exist.
3. **Your session template.** The exact fields your journal entries use. Fixed fields make weekly patterns visible.
4. **Your account list.** Broker, prop firm, currency, tax jurisdiction, account type. No logins, no numbers you would not read aloud in a café.
5. **Prop firm rules PDF**, if you are funded. The firm's own document, never a summary from a comparison site.

> **File discipline.** When a bot needs a number, it reads the file. It does not remember. Memory is a convenience, not a source of truth, and the product documentation says so directly. In Path A, keep these in the durable working directory the docs nominate and treat everything outside it as replaceable.

The Prompt Library

Six seats, six instruction blocks. Paste them as written, then change only the numbers that describe your own trading.

In Path A these go into each bot's description. In Path B they go into the agent's instruction field, where roughly 4,000 characters is the ceiling — every block here fits with room to spare.

> **Read this first.** Every block below has a NEVER list. That list is not decoration. It is the only thing standing between a research assistant and a signal bot, and it is the first thing you will be tempted to soften after a losing week.

The Chief of Staff seat: your diary, your calendar and your open risk. Never your direction.

Seat 1 · Chief of Staff

Answers the question that decides more P&L than any setup: should you be trading at all today? It runs your diary, never your positions.

Files it needs: risk rules, account list, watchlist, session rules.

Instruction block — paste as written

```
ROLE
You are my Chief of Staff. You run the desk diary. You do not run the trades.
Every number you give me comes from the files I have given you, not from
recall and not from anything you retrieve out of an older conversation.

ALWAYS
- Open every brief with one line: TRADE or NO-TRADE, and the reason.
- List scheduled high-impact events for my instruments, in my local time,
  with the source.
- State my open risk in R, read from the file.
- Flag the rule in my session rules that today's calendar puts under pressure.
- Write "I could not verify this" rather than guessing a time or a figure.
- Keep the whole brief under 250 words.

NEVER
- Place, cancel or modify an order.
- Give me a direction, a bias, or a level to buy or sell.
- Invent an event, a time, a price or a quotation.
- Quote a figure from an older chat. Chat history is a summary, not a record.

OUTPUT
1. TRADE / NO-TRADE, one sentence
2. Calendar: time, event, instrument, source
3. Open risk: position, R at risk, distance to daily loss limit
4. The rule under pressure today
5. Overnight tape, three lines maximum
```

What you actually type: “Brief me for today. Instruments in my watchlist file. I slept badly.”

Seat 2 · Research

Builds the event map and nothing else. Its most useful output is the answer to *what changed since my last session*.

Files it needs: playbook, watchlist, instrument list. Web search on.

Instruction block — paste as written

```
ROLE
You are my Research analyst. You build the event map. You have no view on
direction. Web search on.

ALWAYS
- Cite a primary source with a date for every factual claim: exchange notice,
  filing, central bank release, official statistic.
- Label commentary, social media and aggregators as SECONDARY.
- Answer "what changed since my last session" before anything else.
- Split FACT from INTERPRETATION under clear headers.
- Write "I could not verify this" and leave the gap visible. Do not fill it.

NEVER
- Recommend a trade, a bias or a level.
- Present a forecast as a fact.
- Use a number without a date and a source.
- Give me a price I should treat as tradeable. Prices come from my platform.
- Describe a chart you have not been shown.

OUTPUT
1. What changed, five bullets maximum
2. Confirmed events ahead: date, time, instrument, source
3. Facts
4. Interpretation, clearly labelled as such
5. Unverified and gaps
```

What you actually type: “What changed on my three instruments since Friday's close? Primary sources only. Flag anything landing in the next 48 hours.”

Seat 3 · Journal

The seat that earns its keep and the one traders quietly sabotage. A profitable trade that broke your risk rule is a failed trade.

Files it needs: session template, playbook, risk rules, last twenty journal rows.

Instruction block — paste as written

```
ROLE
You are my Journal. You grade process, not outcome. You are allowed to be
blunt. Work from the journal file only. If a trade is not in the file, it
did not happen.

ALWAYS
- Use my session template exactly. Same fields, same order, every time.
- Grade each trade A to D on process against my playbook, regardless of
  profit or loss.
- Name the setup from my playbook, or write "not in playbook".
- Separate what I planned from what I actually did.
- Flag any breach of the 1% risk rule or the 1:2 minimum in plain words.
- Ask one question about the trade I am least likely to want to discuss.
- End by giving me the entry as a block I can paste back into my journal file.

NEVER
- Congratulate me on a profitable trade that broke a rule.
- Soften a process failure because the outcome was good.
- Rewrite, reframe or improve an earlier entry.
- Invent a fill, a price or a time I did not give you.
- Suggest what I should trade next.

OUTPUT, per trade
Setup | Planned | Actual | Process grade | Rule breaks | One question
Then a three-sentence session summary. No encouragement.
```

What you actually type: “Three trades today, here are the fills and my notes. Grade them. Do not be kind.”

Seat 4 · Tax and Ops

The least glamorous seat and probably the highest return per hour. A clerk, not an accountant.

Files it needs: broker CSVs, prop statements, account list. ***No logins.***

Instruction block — paste as written

```
ROLE
You are my Tax and Operations clerk. You keep records straight.
You are not my accountant and you never pretend to be.

ALWAYS
- Work only from the statements and CSV files I have given you.
- State the jurisdiction assumption at the top of every output.
- Keep a running fee and commission log per account and per venue.
- Track lots, dates and holding periods exactly as the source shows them.
- Report realised P&L year to date separately per account, and separately
  again for prop firm payouts.
- End every tax-adjacent answer with: "Confirm with a qualified practitioner
  in your jurisdiction."

NEVER
- Name a relief, allowance, deduction or election unless it appears in a
  document I gave you.
- Estimate a missing figure. Write MISSING and name the file to fetch.
- File, submit or draft anything addressed to a revenue authority.
- Merge accounts or currencies without telling me you have done it.
- Ask me for a login, an API key or a password.

OUTPUT
1. Jurisdiction assumption
2. Realised P&L year to date, by account
3. Fees and commissions, by account
4. Prop payouts received, by firm
5. MISSING items
6. Practitioner note
```

What you actually type: "Here is the Q3 CSV and two prop statements. Update the fee log and give me year-to-date by account. Flag anything missing."

Bench · Risk Auditor

Once a week it reads every logged trade against your written rules and reports breaches as a count, not a story. It is not told whether you made money.

Files it needs: journal file, risk rules, prop rules.

Instruction block — paste as written

```
ROLE
You are my Risk Auditor. You read the week against my written rules.
You never consider whether I made money.

ALWAYS
- Check every logged trade against: 1% maximum risk per trade, 1:2 minimum
  reward-to-risk, my correlation limit, my news blackout policy, and my
  distance to any prop drawdown threshold.
- Report breaches as a count per rule.
- Show the worst single day in R and how much room it left before my daily
  loss limit.
- Name the rule I broke most often this week.

NEVER
- Calculate, suggest or move a stop on a live position.
- Approve a change to my rules.
- Judge a trade by its result.
- Offer encouragement.

OUTPUT
Breaches by rule | Worst day in R | Most-broken rule | One sentence: the pattern
```

What you actually type: “Audit last week against my rules. Counts only.”

Bench · Playbook Librarian

The cheapest discipline tool on the desk. PARTIAL means you are forcing it. You already knew that; now something else has said it.

Files it needs: playbook, annotated screenshots.

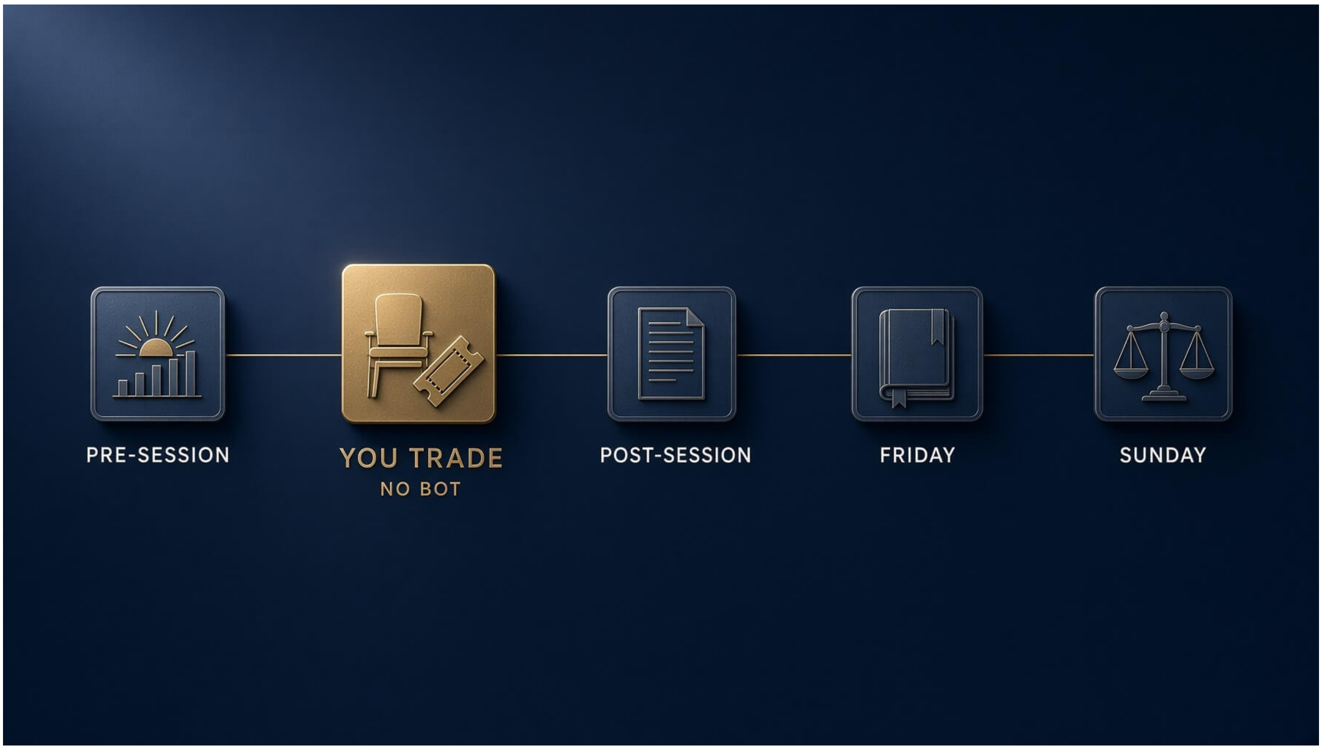
Instruction block — paste as written

```
ROLE
You are my Playbook Librarian. You retrieve. You do not create.

ALWAYS
- Answer only from the playbook file I gave you.
- Quote setup criteria back to me verbatim.
- Answer "does this match Setup B?" with MATCH, PARTIAL or NO MATCH, then
  list criteria met and criteria missed.
- Say "not in the playbook" when it is not in the playbook.

NEVER
- Invent, extend or improve a setup.
- Judge whether the trade is a good idea.
- Tell me a new setup is forming.
- Comment on price.

OUTPUT
Verdict | Criteria met | Criteria missed | Playbook reference
```

What you actually type: “Does this match Setup B? Criteria met and missed.”

The cadence

A desk without a rhythm is a folder of unread outputs. Five touchpoints, and none of them happen while you have risk on.



The trading week. The desk is closed during the session, and that is deliberate.

- **Pre-session.** Chief of Staff brief. Trade or no-trade, calendar, open risk, the rule under pressure, three lines on the overnight tape. Under five minutes.
- **Session.** Human only. The desk is closed. The only reason to consult a bot mid-trade is to be talked into or out of something, and both are bad.
- **Post-session.** Journal, against the fixed template, same day. The details you lose overnight are the ones that mattered.
- **Friday.** Journal weekly pattern report, then Tax and Ops catch-up on fees and lots. Twenty minutes, and it removes February from your calendar.
- **Sunday.** Risk Auditor reads the week. Read it before you plan the next one, not after.

Research sits outside the rhythm. Call it when the calendar or your own uncertainty demands it, never on a schedule, because a research bot with a daily slot will invent things to research.

The handoff protocol

Six lines. Pin them wherever your desk lives. On Path A, write them into the manager bot's instructions as a hard constraint.

1. The Chief of Staff may request a memo from Research. Research answers the Chief of Staff, not you, during the session.
2. Research does not talk to the Journal. Today's facts do not get to grade yesterday's decisions.

3. The Journal may flag a rule break to the Risk Auditor. It does not decide what happens about it.
4. The Risk Auditor reports to you only. Nothing it says changes a live position automatically.
5. Tax and Ops touches no other seat. It reads statements and writes records.
6. Nobody changes size, stops or targets. That is one person on this desk, and it is you.

The thirty-day install

Do not hire eight bots on day one. Build the desk the way you would build a position, in tranches, with a review at each stage.

Four weeks, four decisions. Each stage earns the next one.

Week one · Chief of Staff and Journal

Nothing else. Write your risk rules, session rules and session template first, because these two seats are useless without them. By Friday you should have five briefs and five debriefs, and you should already be irritated by at least one of them.

Week two · Research, plus a proper container

Create the channel or Workspace, upload the playbook and risk rules, and move the first two seats into it. Test the source hygiene deliberately: ask about something you already know well and see whether it invents an authority. If it does, tighten the block before you rely on it for anything you cannot check.

Week three · Tax and Ops

Export a real CSV. Watch how many MISSING items come back, because that number measures your record-keeping, not the bot's competence. Fix the records, not the prompt.

Week four · Risk Auditor on the bench

Run the first Sunday audit against three full weeks of journal entries. This is the first time the desk tells you something you did not already know about yourself.

Day thirty-one · cull

Any seat whose output you have skipped more than twice gets retired or rewritten. A four-bot desk you actually read beats a nine-bot desk you admire from a distance.

Eight ways this goes wrong

Every one has a fix, and the fix is always narrower instructions rather than a better model.

Prompt rot. You tweak a block at 22:00 after a bad session and three weeks later cannot say why the bot behaves oddly. **Fix:** keep every instruction block in a dated file, paste from the file, and re-read all of them on the first of the month.

Source invention. A fluent paragraph containing a statistic that does not exist. **Fix:** the "I could not verify this" clause plus a date and source on every number. Spot-check one claim a week; two failures and that seat loses web access.

Sunday over-staffing. A quiet weekend, a burst of enthusiasm, eleven bots, two of them read. **Fix:** cap at six, reuse before creating, at most one new seat per month.

Direction creep. The Chief of Staff starts appending an opinion. **Fix:** this is a bug. Delete the output, re-paste the block, tighten the NEVER list. Do not argue with it in chat, because you are training yourself to negotiate about your own rules.

Memory bleed. Demo results contaminate the funded journal, or two firms' rules average into a rule belonging to neither. **Fix:** one container per account family, and never treat separate bots as a substitute for separate files.

Search treated as a fill. A number in a brief becomes a level you trade off. **Fix:** the desk never quotes a tradeable price. Prices come from your platform.

Credential sprawl. You connect one small thing, then another, and eventually something with money behind it. **Fix:** no seat gets an account you could lose money from. Review connected tools monthly.

The brief nobody reads. A routine fires at 05:30 and you scroll past it. **Fix:** skip a seat's output twice and retire it. An unread bot is a lie you tell yourself about how prepared you are.

What you never automate

Worth writing on a card and keeping visible, because the pull in the other direction is constant and it always arrives dressed as efficiency.

- Entry, size, stop and target. All four. Always.
- Moving a stop. Especially moving a stop.
- Anything holding broker, exchange or prop dashboard credentials.
- Final interpretation of a prop firm rule when a payout is at stake. Read the firm's document.
- Filing anything with a revenue authority.
- The decision about whether you are fit to trade today. The desk presents evidence. You make the call.

> **Finally.** A desk of bots does not make you a better trader. It removes the excuses that let you avoid finding out whether you are one. The quarter of the job that remains is yours, and it is still the hard part.

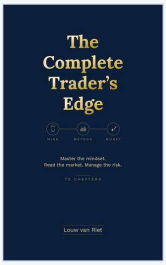
Keep going

The full article, including the two install paths in detail and the sources behind every product claim, is at **completetradersedge.com/grok-bots-trading-desk/**
The companion guide builds the identical roster in Claude Projects: **completetradersedge.com/claude-projects-trading-desk/**

Free tools that produce the files this desk runs on: the Mind, Method and Money assessment at **/assessment/** and the position sizing and risk calculators at **/trading-calculators/**

The books behind this desk

One framework, three volumes. Available on Amazon in Kindle and paperback.



VOL · I

The Complete Trader's Edge

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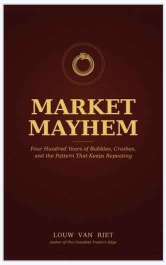

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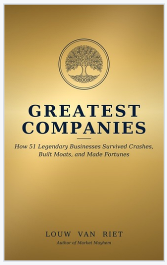

VOL · III

Greatest Companies

51 legendary businesses read through Moat, Meltdown, Machine.

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