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Building a Daily & Weekly Routine Workflow to Increase Profitability

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The stock market is one of the most complex systems in the world, with parts that change every single second.

As individual investors, we need to bring a level of consistency to our system that can prevent us from feeling overwhelmed.

Routines offer this consistency.

As a retail trader/investor, you must have a set routine for your daily review and weekend review.

This is non-negotiable if you want to outperform the market or increase your current levels of profitability.

In your Daily Routine, you should review the following ■

- General Markets
- Current Positions
- Emotional Review
- Focus List
- Summary

Daily Routine

Traders who want to build this habit will always feel and really be more prepared for the day ahead. A daily routine allows you to specifically plan potential scenarios for the next day and sleeping over it overnight will help you cement it in your brain which will lead to better execution for the trading day ahead. Below are some key components to get you started.

Markets



Current Positions



Emotional Review



Focus List



Summary



Sample Daily Routine Workflow / Form



General Markets (10 min)

The goal is to identify if the wind is at our backs.

You should note whether there has been a recent cluster of accumulation/distribution, where price is with respect to the KMAs, & the index's relationship to the highs.

Current Positions (15 min)

The goal is to develop a plan of action for current positions for any scenario.

You want to include the position's grade (A-F), where you will sell on strength/weakness, & any other thoughts.

This is a good place to calculate your open risk as well.

Emotional Review (10 min)

The purpose of this section is to build a mental repository of sessions where you can connect current states to past states. Execution should improve the more you do this.

Jot down any thoughts or emotions you had throughout the trading day.

Focus List (20 min)

This is where you run your nightly scans, screen through your WLs, and develop a maximum of 5 stocks you will be focusing on in the coming session.

Focus Lists should be your only area of emphasis going into the next day.

Summary (5 min)

Jot down any extra thoughts from today's session or areas of emphasis going into tomorrow's session.

All in all, your Daily Routine should take you no more than 1 hour to complete. As you get more experienced running your routine, you will become more efficient.

We want to make we are fresh and ready to trade to our full potential the following session.

In your Weekend Routine, you should review the following ■

- General Markets
- Current Positions
- Emotional Review
- Focus List
- Summary

Weekend Routine



We first make our habits, and then our habits make us. – John Dryden

Weekend Routines can be a little bit more extensive as you have time over the weekend to review and study the markets. Below we discuss some of the aspects traders can integrate into their weekend routines.

Markets



Current Positions



Emotional Review



Scans/Focus List



Summary



Sample Weekend Routine Workflow



Everything stated above applies to your Weekend Routine, but this is where you can spend more time scanning and developing a feel for what names are acting the best across all sectors.

The Weekend Routine is where you should be forming your WLs w/ new names, removing old, etc.

We should try to keep the weekend routine timeline to less than 3 hours. That way we can return to the desk on Monday with a clear mind, ready to execute.

To reiterate, Routines help you:

- Build consistent habits
- Focus on what is important in the market
- Give you confidence & clarity for upcoming sessions

Routines should NOT:

- Take all your time post market
- Be skipped

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What parts of your routine are you looking to improve on in 2022? Let us know below ■