

Plan it. Log it. Learn from it.

A complete guide to the local-first Phoenix Performance Log—built to help traders document execution, measure patterns, and review decisions with discipline.



Private by default

Your records stay in your browser unless you intentionally export a backup or spreadsheet.

Your performance system in six views.

Use the sidebar to move from immediate performance feedback to the deeper review and data-control workflows.

01	Dashboard	Core metrics, monthly target, equity curve, daily output, setup/session breakdowns, and rule adherence.
02	Trade journal	A searchable, filterable record of every execution and its process context.
03	Calendar	Daily P&L; and trade count arranged by month. Select any date to log a trade.
04	Reviews	Weekly, monthly, and quarterly reflections that convert experience into a next focus.
05	Goals & rules	Measurable targets and a non-negotiable execution playbook.
06	Backups	CSV, JSON, restore, printable PDF report, and profile reset controls.

Suggested rhythm

Log immediately after execution. Review briefly at day-end. Complete a formal review weekly and monthly.

Capture the decision—not only the result.

The trade form separates objective execution details from process and psychology, making each record useful for review.

A	Execution	Date, time, market, session, symbol, direction, and the documented setup/playbook.
B	Risk & pricing	Entry, stop, target, exit, risk amount, reward amount, planned R:R, position size, points/pips, and realized P&L;
C	Confirmations	Signal printed, zone/order-block bounce confirmed, and PHX Scanner momentum matched.
D	Process	Outcome, rules followed, mistake category, emotions before/after, screenshot link, and detailed notes.

A useful note answers three questions:

1	What did I see?	Record the market context and exact setup criteria.
2	What did I do?	Describe entry, management, exit, and any deviation from the plan.
3	What changes next?	Write one precise lesson you can apply on the next valid setup.

Avoid hindsight editing

Record the planned risk and setup before changing the story based on the outcome.

Read the numbers in context.

No single metric defines quality. Use the dashboard to connect profitability, risk, consistency, and execution discipline.

01	Net P&L;	Realized gains minus realized losses in the selected 7D, 30D, 90D, or all-time range.
02	Win rate	Winning trades divided by total trades. Interpret it alongside average win/loss and profit factor.
03	Profit factor	Gross profit divided by gross loss. A high number from very few trades needs more evidence.
04	Average win/loss	Shows whether your payoff profile supports your observed win rate.
05	Max drawdown	Largest peak-to-trough decline in the selected sequence.
06	Rule adherence	Percentage of trades marked as following the playbook.

Important

Past results do not guarantee future performance. The log is a review tool, not a prediction or financial-advice system.

Find the conditions behind the result.

Use setup, session, calendar, and process breakdowns to identify where your plan is most and least repeatable.

S E T	Setup	Compare trade count, realized P&L, and win rate by documented playbook.
T I M E	Session	Review whether Asia, London, New York, overlap, or another session fits your approach.
D A Y	Calendar	Spot clusters of profitable, losing, inactive, or overtraded days.
P R O C	Discipline	Contrast rule-followed trades against exceptions and recurring mistake categories.

Better questions to ask

?	Sample size	Is this pattern repeated across enough trades to be meaningful?
?	Risk consistency	Did the result come from a stable plan or one unusually large position?
?	Process quality	Would this still count as a well-executed trade if the outcome were reversed?

Convert activity into a decision.

Formal reviews preserve what worked, identify what needs work, and commit the next focus before a new trading period begins.

01	Choose a period	Use weekly for tactical adjustments, monthly for pattern review, and quarterly for strategy-level reflection.
02	Write what worked	Name the behaviors and setups that were both repeatable and aligned with the playbook.
03	Name the constraint	Identify one recurring process breakdown instead of listing every frustrating outcome.
04	Commit one focus	Make the next focus observable—for example, wait for confirmation before every entry.

Keep it measurable

A good next focus can be checked trade by trade. A vague goal such as “be better” cannot.

Define disciplined before the market opens.

Goals provide direction; rules protect the process. Keep both simple enough to use under pressure.

G O A L	Performance targets	Track currency, percentage, R-multiple, or trade-count goals. The monthly P&L; and rule-adherence goals update automatically.
R U L E	Playbook checklist	Add, deactivate, or remove rules as your written trading plan evolves.
R I S K	Daily boundaries	Consider documenting maximum daily risk, maximum number of attempts, and conditions that end the session.

Example rules

1	Signal	The Phoenix signal prints.
2	Location	Price bounces from a support/resistance zone or an order block.
3	Momentum	Momentum matches on the PHX Scanner.

Owner responsibility

The log does not place trades, enforce broker controls, or determine suitable risk. You remain responsible for every trading decision.

Back up before you need a backup.

The Performance Log is local-first. Clearing browser storage, changing devices, or using private browsing can remove records unless you export them.

C S V	Spreadsheet export	Exports every trade field for Excel, Google Sheets, accounting review, or custom analysis.
J S O N	Complete backup	Preserves profiles, trades, reviews, goals, rules, and settings in one restorable file.
R E S T	Restore	Imports a Phoenix JSON backup after confirmation.
P D F	Performance report	Uses the browser Print / Save as PDF flow for a clean dashboard report.

Backup habit

Export a full JSON backup at least monthly and store it in a secure location you control.

Keep different risk environments separate.

Create a distinct profile for each trading account, evaluation, funded account, or strategy environment you want to measure independently.

01	Create	Choose Manage, cancel the edit prompt, then enter a new account name and starting balance.
02	Switch	Use the Account selector in the top bar. Every dashboard and view updates to that profile.
03	Edit	Choose Manage and confirm the edit prompt to rename the active account or change its starting balance.
04	Reset	Backups → Reset profile clears only the active profile after a destructive-action confirmation.

**Do not combine
unlike accounts**

Separating accounts keeps drawdown, equity, target, and behavior analysis honest.

Use it in the browser or offline package.

The hosted version runs directly at the Phoenix Performance Log site. The downloadable package can be opened locally in a modern browser.

W E B	Hosted app	Open the Performance Log and select "Open the Log." Data remains tied to that browser profile.
P W A	Installable app	On supported browsers, use the browser's Install App control for a focused standalone window.
Z I P	Offline package	Download, extract the ZIP, and open the included app/index.html file. Keep the folder structure intact.
M O V E	New device	Export JSON on the original device, transfer it securely, and import it on the new device.

If records appear missing

Confirm you are using the same browser profile, account profile, site address, and non-private window. If the browser storage was cleared, restore your latest JSON backup.

Support boundary

Never email or publicly post a backup containing personal trading records. Remove sensitive details before sharing screenshots.

THE REVIEW LOOP

Plan. Execute. Measure.

The goal of a journal is not to make every trade a winner. It is to make your decisions visible enough to improve.

0 1	Before	Define the setup, invalidation, size, and planned risk.
0 2	During	Execute the written plan and document material changes.
0 3	After	Record the result, behavior, screenshot, and one useful lesson.
0 4	Review	Measure repeated patterns weekly and adjust one behavior at a time.

Risk disclosure

Trading involves substantial risk and may not be suitable for everyone. Past performance does not guarantee future results. Phoenix Performance Log is for recordkeeping and education and is not financial advice.