1. Define the job

A printable comparison record, not a platform ranking. Fill one copy for each candidate. Prices and availability must be checked for your exact account, product and region.

Start with a task	Examples: compare one spot pair, inspect account records, export a tax-year ledger, or evaluate a paper strategy. Do not buy a bundle of capabilities you have not identified.

Task and required output:

Provider legal entity / country / exact product and account phase:

Official eligibility and terms URL / date checked:

Hard requirement	An unavailable jurisdiction, missing report year or unsupported required operation is a stop in this comparison. A high overall score cannot compensate for it.
Access boundary	Viewing a site is not permission to use every product. Record restrictions and payment methods accurately; do not use location or identity workarounds.
Evidence boundary	Mark each entry: provider statement, your observation, reproduced test, or unresolved. Do not turn a marketing claim into a test result.

Unresolved requirement / evidence needed:

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2. Calculate matched costs

Use filled turnover and the correct rate for each leg. These numbers are invented teaching inputs, not current exchange fees or a forecast of savings.

Matched example	Buy turnover $1,000 and sell turnover $1,000. At 0.10% per side, fees are $1 + $1 = $2. At 0.06% per side, they are $0.60 + $0.60 = $1.20.
Difference	$0.80 per assumed round trip. A hypothetical $20 monthly tool costs the same as 25 such differences. That is a break-even calculation, not a reason to create extra trades.
Volume units	If $100,000 means total filled turnover, reducing 0.10% to 0.04% saves $60. If it means $100,000 on each of two legs, total turnover is $200,000 and the difference is $120.
Execution costs	Compare actual fills, spread, slippage, applicable funding and withdrawal/network costs. Do not subtract spread again if it is already embedded in the recorded fill prices.
Limit is not maker	A marketable limit can take liquidity. Post-only, quantity increments, time in force and partial fills affect the result. A fee discount is not guaranteed execution.

My filled turnover / rate basis / extra fixed costs:

Matched total cost and source date:

3. Separate tools from authority

Charting, account tracking and automated order execution are different jobs. A tool stack does not establish a trading edge.

Charts	Match venue, instrument, time zone and completed-bar rule. A spot chart and a perpetual contract are not the same price series.
Tracking	Use only required reading permissions. Check quantities, liabilities and last-success timestamps. A missing value should remain unknown rather than become zero.
Execution	Trading permissions can cause losses even with withdrawals disabled. An exchange connection does not move assets out of exchange custody.

Paper failure cases to explain before proceeding

Rejected request	Expected: no assumed fill. Record the rejection and reconcile open orders before deciding what to do next.
Lost acknowledgement	Expected: outcome unknown until reconciled. Do not duplicate an order merely because a response did not arrive.
Stale data / restart	Expected: stop new decisions based on expired inputs; inspect existing state. Restarting a process does not resolve its prior orders.

Observed result / remaining position / open instructions:

These are evaluation cases, not code to trade. Paper results do not reproduce queue priority, liquidity or market impact. No named bot was tested for this worksheet.

4. Reconcile the snapshot

Separate quantity, valuation and cash flows. The following invented balances are a checkable example, not an actual portfolio.

Assets and debt	2 ETH in a wallet + 1 ETH at an exchange, at $2,000 per ETH; $1,000 cash; $500 debt. Net value = 3 x $2,000 + $1,000 - $500 = $6,500.
Find the discrepancy	$7,000 omits the debt. Pricing all 3 ETH at $1,800 instead of $2,000 changes the total by $600. Check quantities before blaming a valuation difference.
Deposit is not return	Add $500 cash with all prices and debt unchanged: net value becomes $7,000. Balance growth is about 7.69%; investment profit in this example is zero.
Do not double count	A separate pool receipt worth $1,200 represents $800 ETH + $400 USDC. Include the receipt or its components, not $1,200 + $800 + $400 = $2,400.
Export test	Retain source IDs, timestamps, fee assets and corrections. Repeat an import in a test copy; it should not silently duplicate records or erase manual work.

Missing account / price / acquisition record:

Difference explained by / still unresolved:

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5. Keep a decision record

A useful outcome can be "not enough evidence" or "the existing tool is sufficient." Do not hide a failed requirement inside an average score.

Requirement met / source or test result / date:

Reason to retain, reject or postpone this candidate:

Recurring cost / renewal / export and exit path:

Follow-up references

AITR reading paths (not purchase instructions):
ai-trading-ranked.com/posts/best-crypto-exchange-low-fees
ai-trading-ranked.com/posts/choose-a-crypto-trading-workflow
ai-trading-ranked.com/posts/crypto-portfolio-management-tools
ai-trading-ranked.com/posts/crypto-trading-for-beginners

Provider example for order-type details, checked 2026-10-26:
help.coinbase.com/en/coinbase/trading-and-funding/advanced-trade/order-types
This describes that venue; verify the rules of any other product separately.

Scope and commercial disclosure

This edition contains no platform ratings, return targets, current fee ranking or personal trading-test claim. Calculations are synthetic. It does not establish legal eligibility, tax treatment, security, solvency or future performance. Trading can lose capital.

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