Scale and Shield your Portfolio with Options (Intermediate Level)

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Options trading entails significant risk and is not appropriate for all customers. It is important that investors read Characteristics and Risks of Standardized Options before engaging in any options trading strategies. Opening new options positions close to or on their expiration date comes with substantial risk of losses for reasons that include potential volatility of the underlying security and limited time to expiration. Options transactions are often complex and may involve the potential of losing the entire investment in a relatively short period of time. Certain complex options strategies carry additional risk, including the potential for losses that may exceed the original investment amount. Supporting documentation for any claims, if applicable, will be furnished upon request. Options trading subject to eligibility requirements. Strategies available will depend on options level approved.

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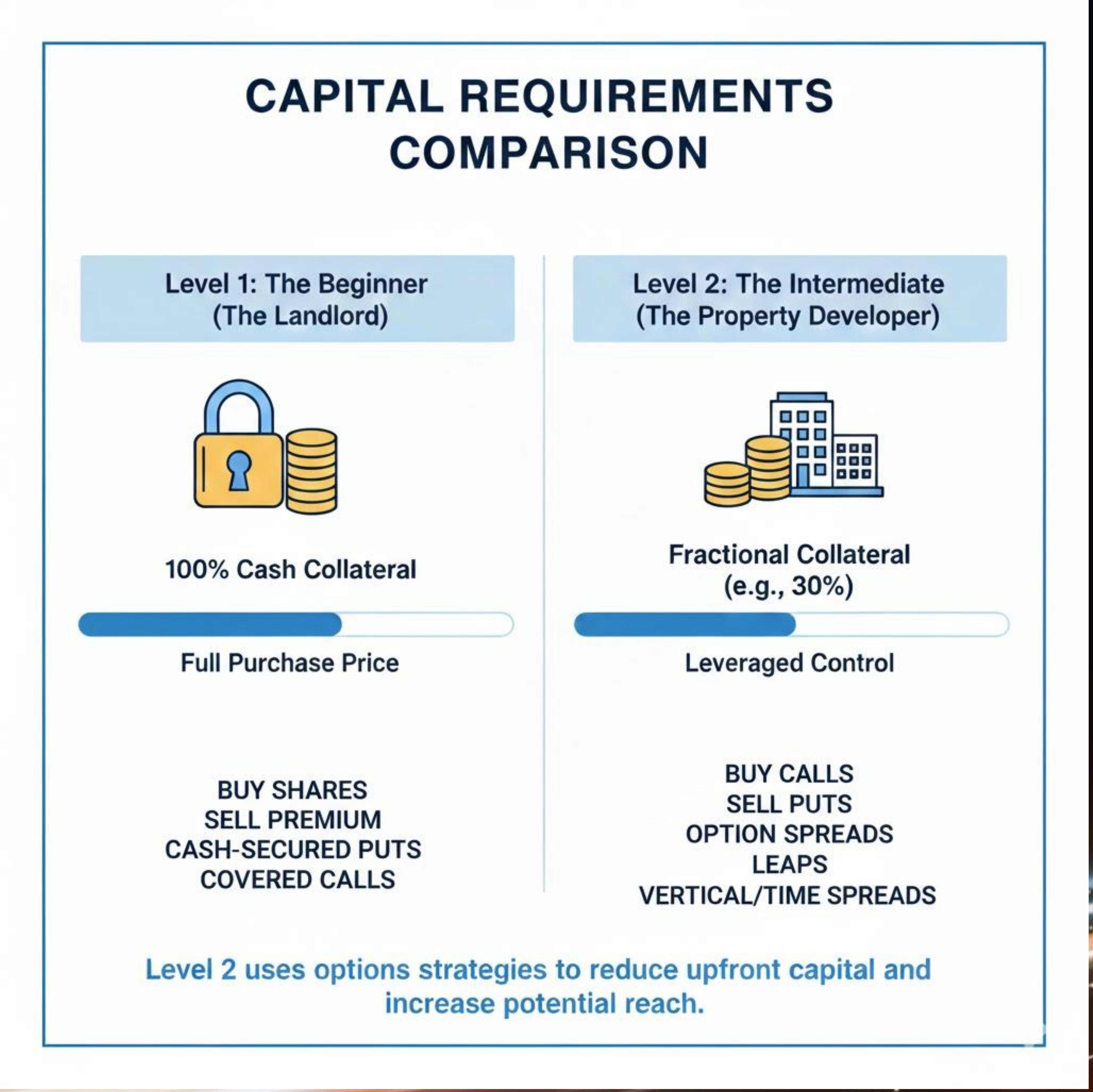
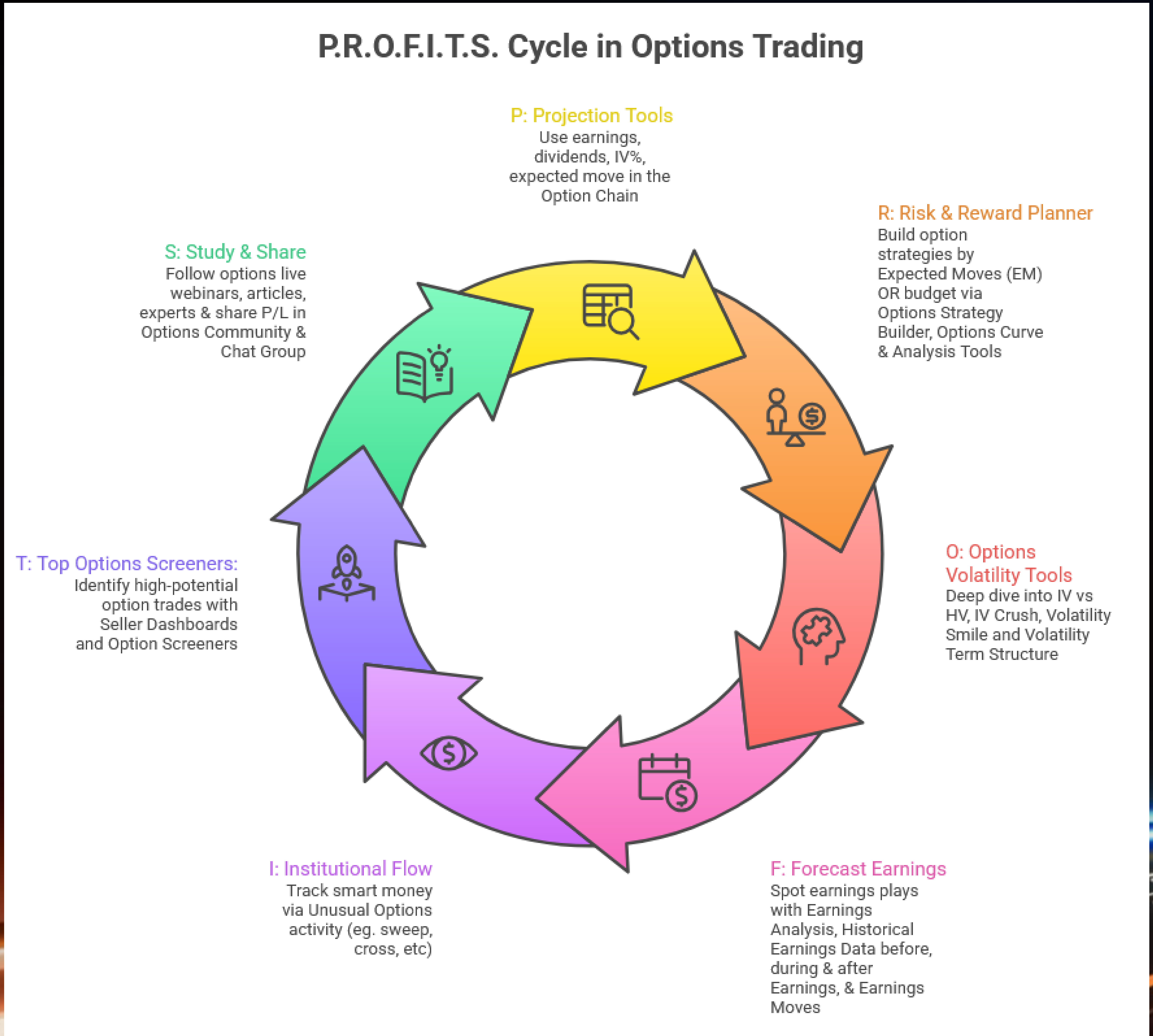
Agenda

01. The Landlord vs Developer Analogy
02. 'Options Spread' Strategy Construction
03. 3 Ways to Scale with Option Spreads
04. Tips to Shield: Legging-in & Rolling
05. Moomoo AI Prompt Tips

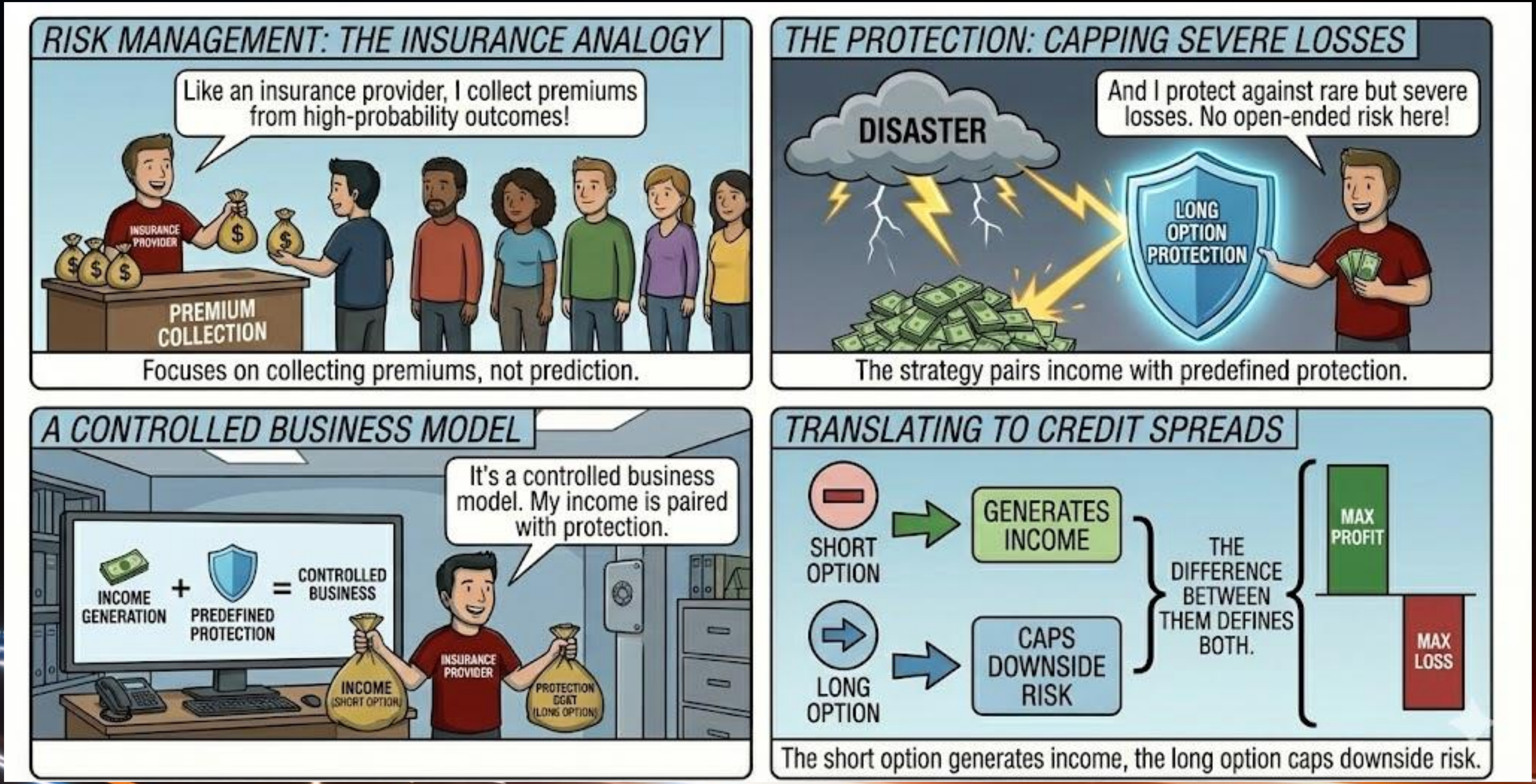
Landlord vs Developer Analogy



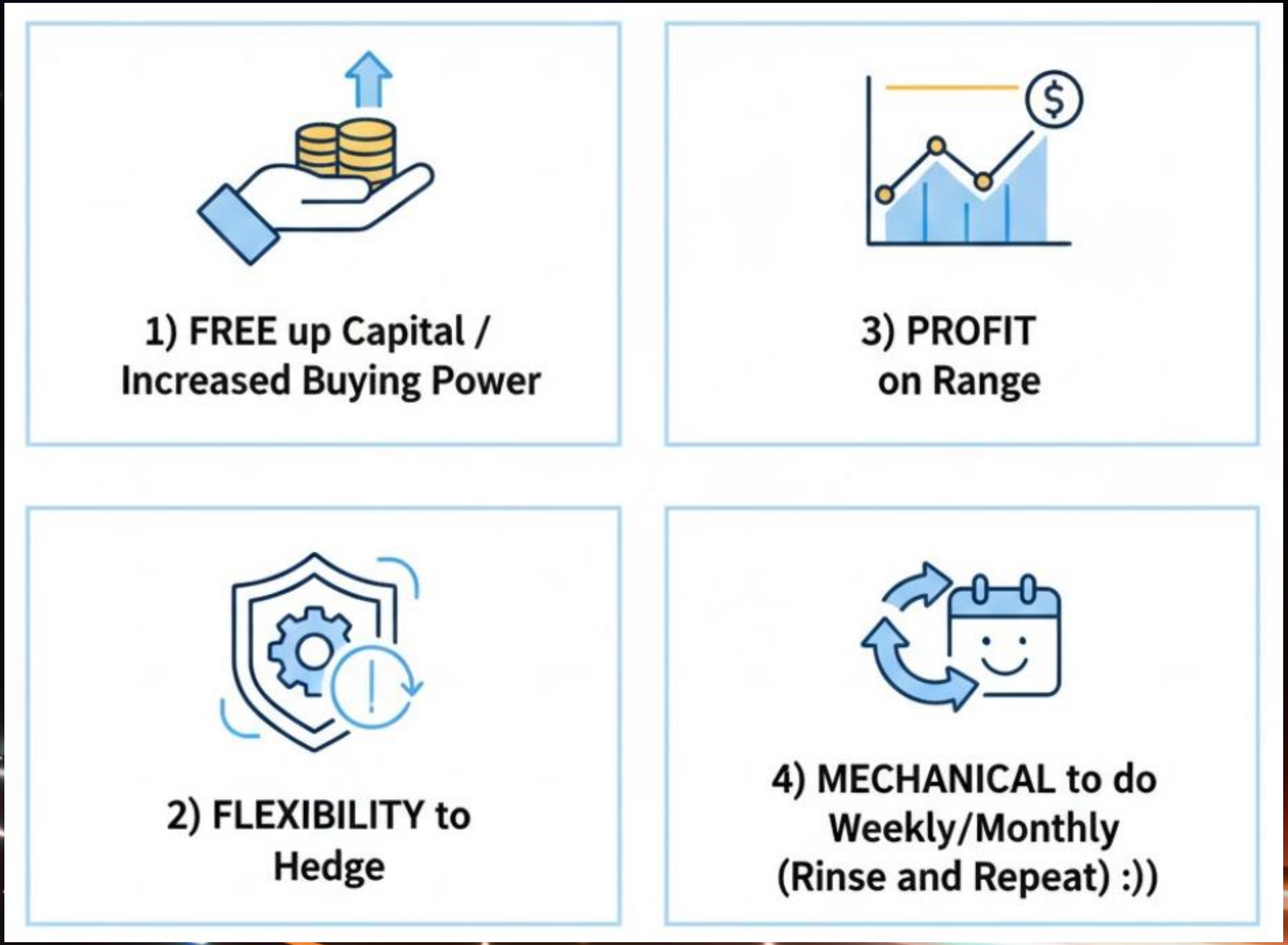
Moomoo - All in One Options Toolkit (P.R.O.F.I.T.S)



Why do Options Spread?



Why do Options Spread?



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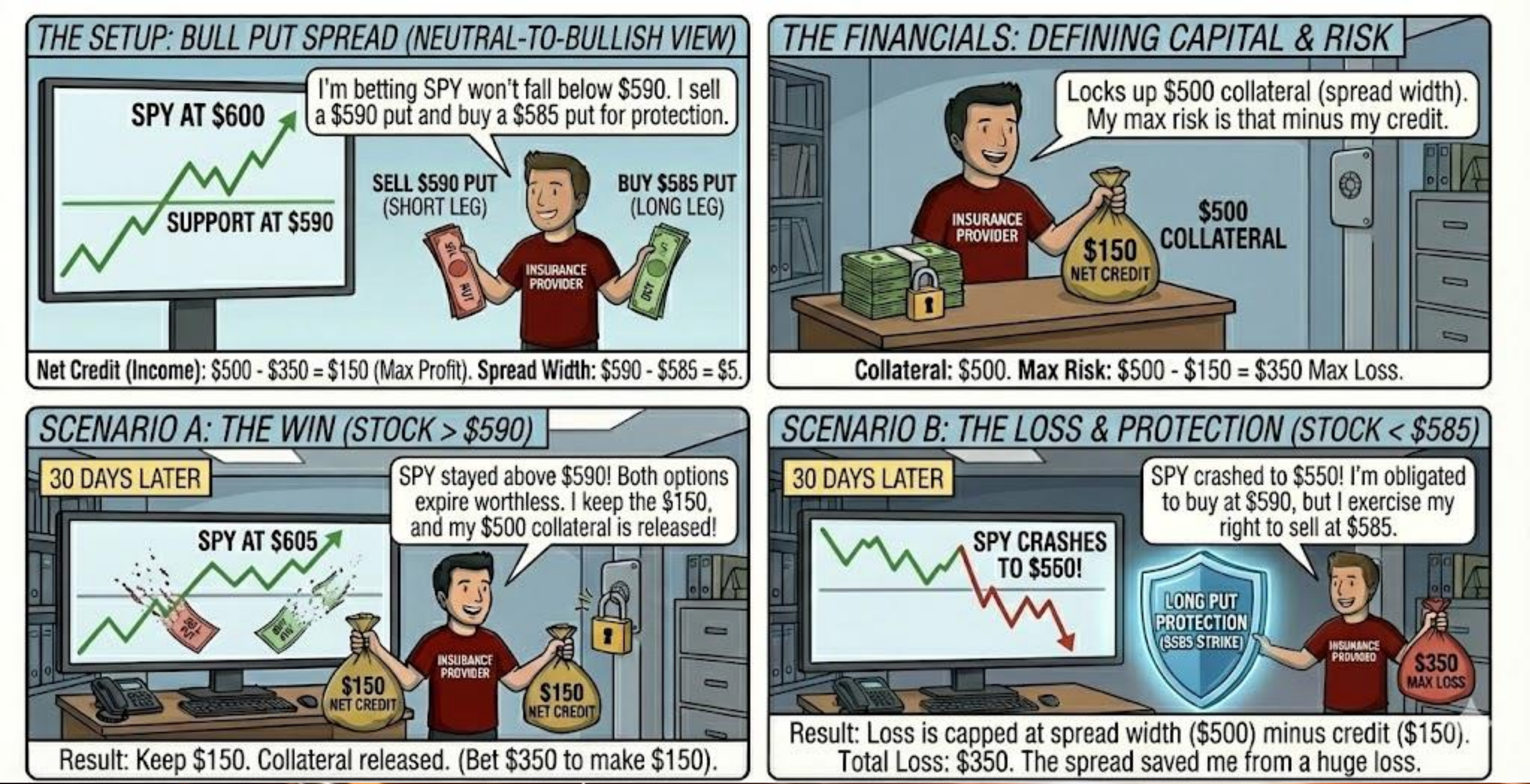
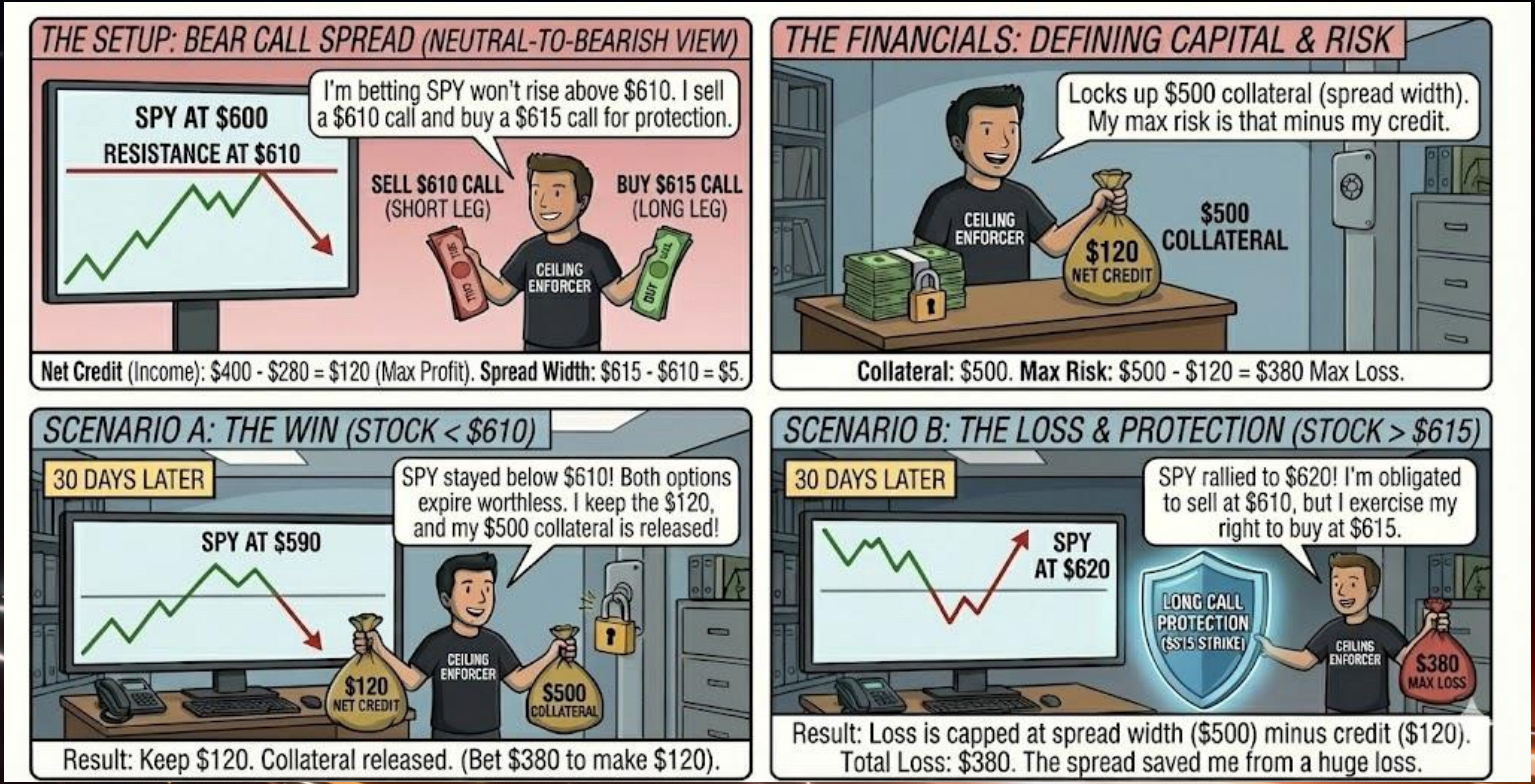
Options Spread #1: Bull Put Spread

Betting on Support



Options Spread # 2: Bear Call Spread

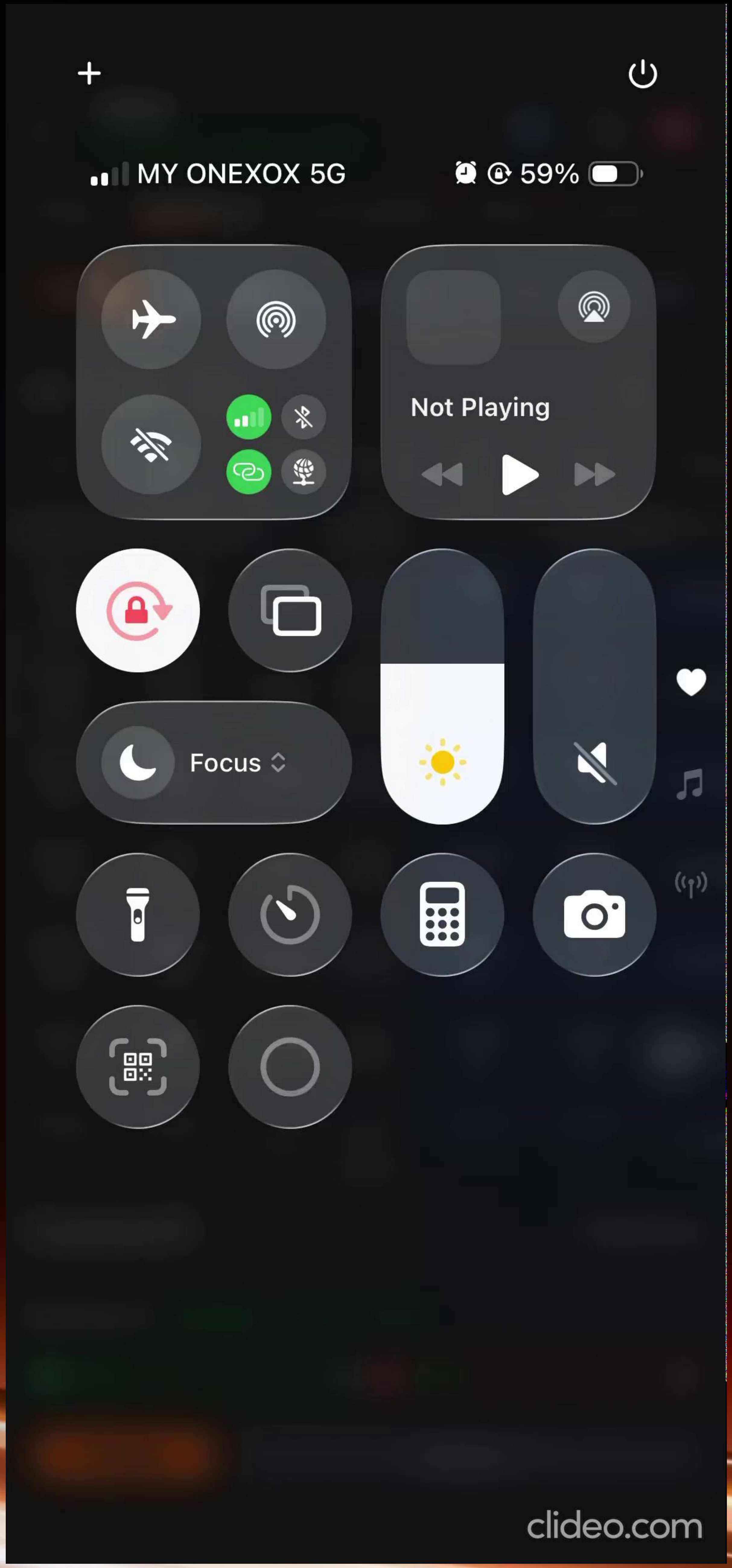
Betting on Resistance



Doing Option Spread on Moomoo App

Step-by-Step:

1) Option Chain
2) Order Execution
3) Wait for Rigt Price to Get Filled
4) Put Exit Order



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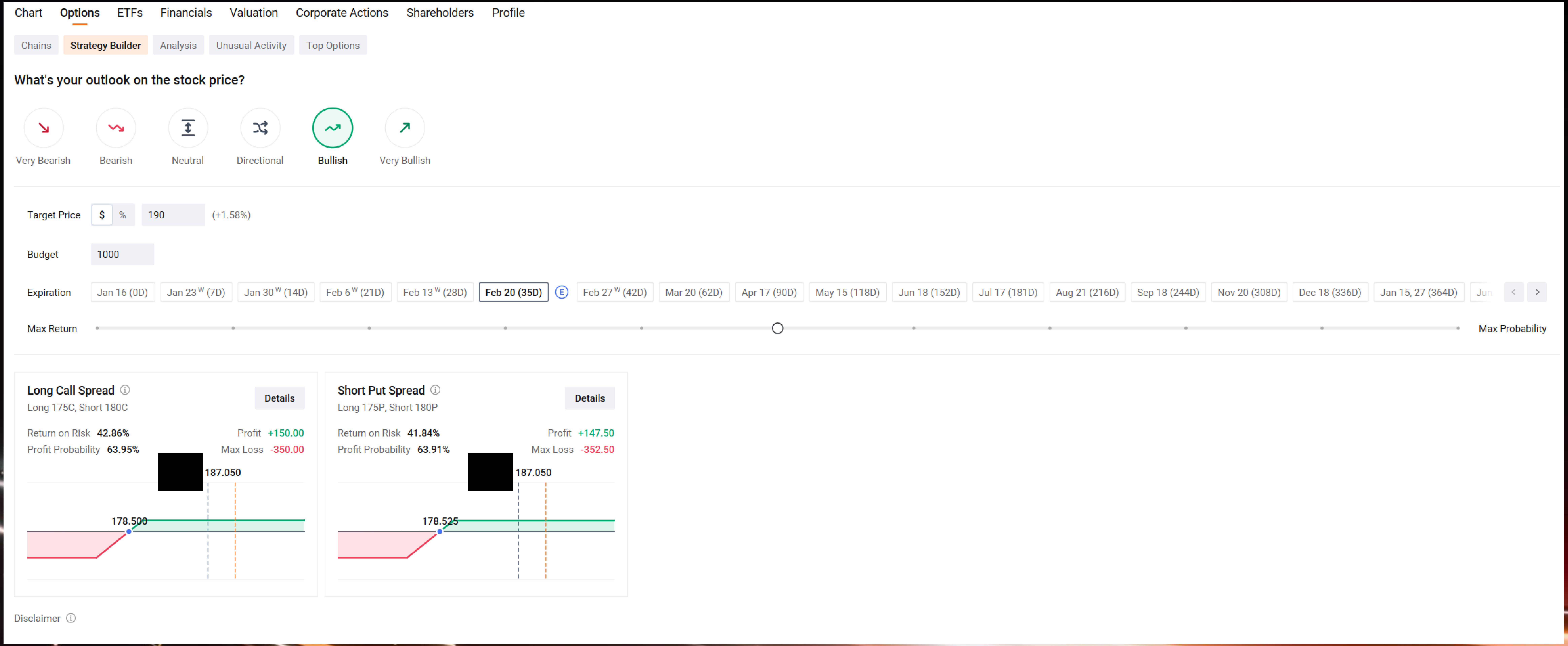
Why do Options Spread on Moomoo Desktop?

3-in-1: Strategy Builder + Options Curve + Expected Move

(1) Strategy Builder



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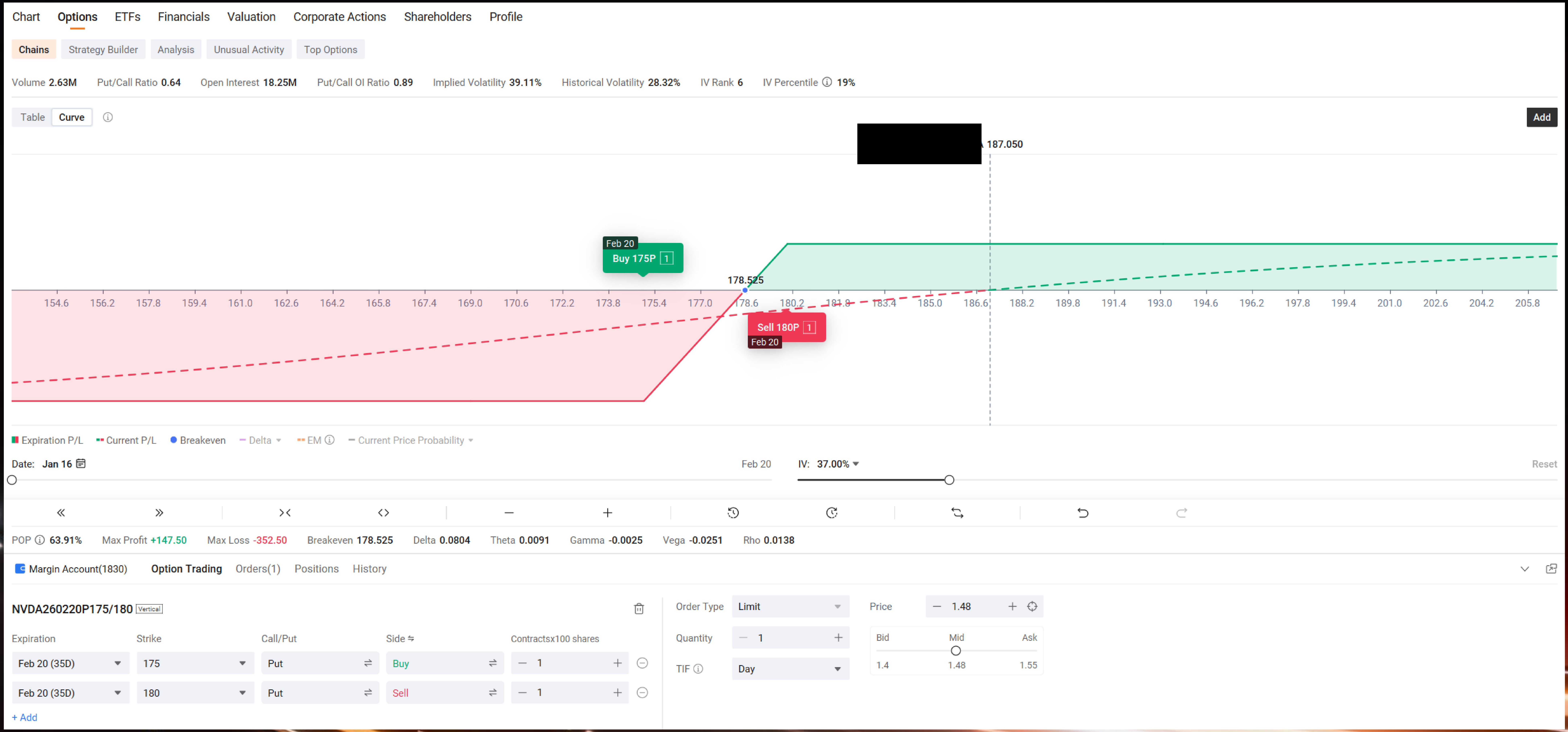
Why do Options Spread on Moomoo Desktop?

3-in-1: Strategy Builder + Options Curve + Expected Move

(2) Options Curve



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Why do Options Spread on Moomoo Desktop?

3-in-1: Strategy Builder + Options Curve + Expected Move

(3a) Expected Move (Options Curve)

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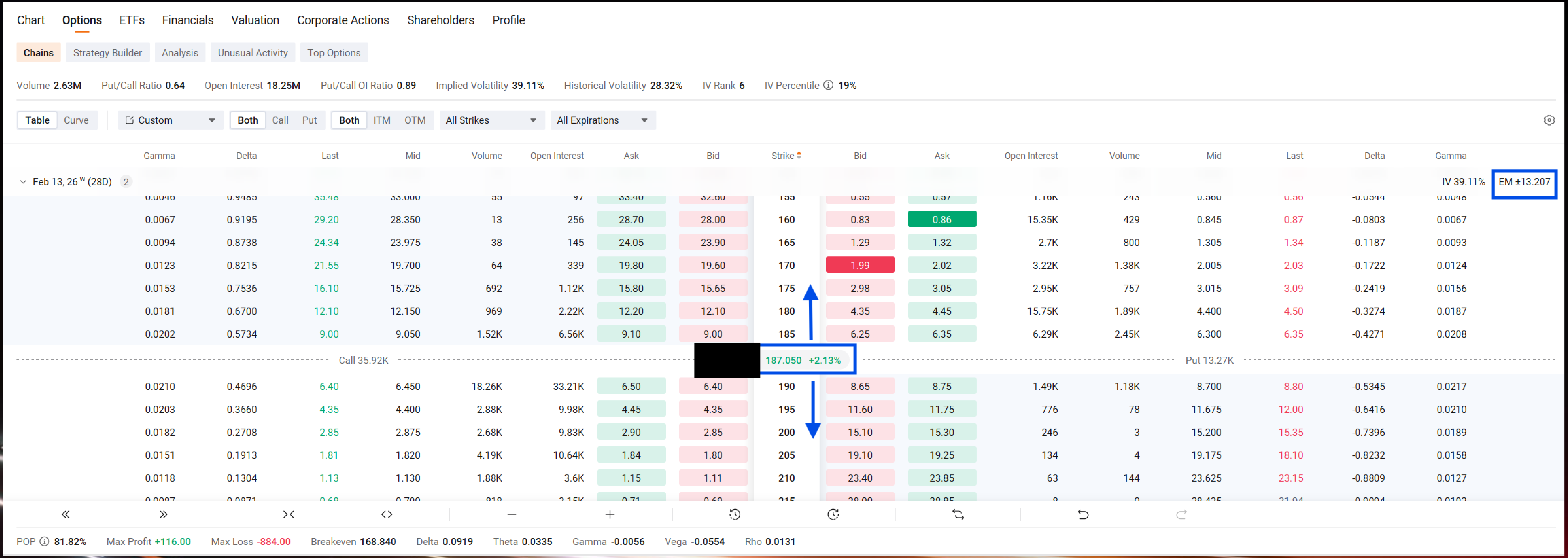
Why do Options Spread on Moomoo Desktop?

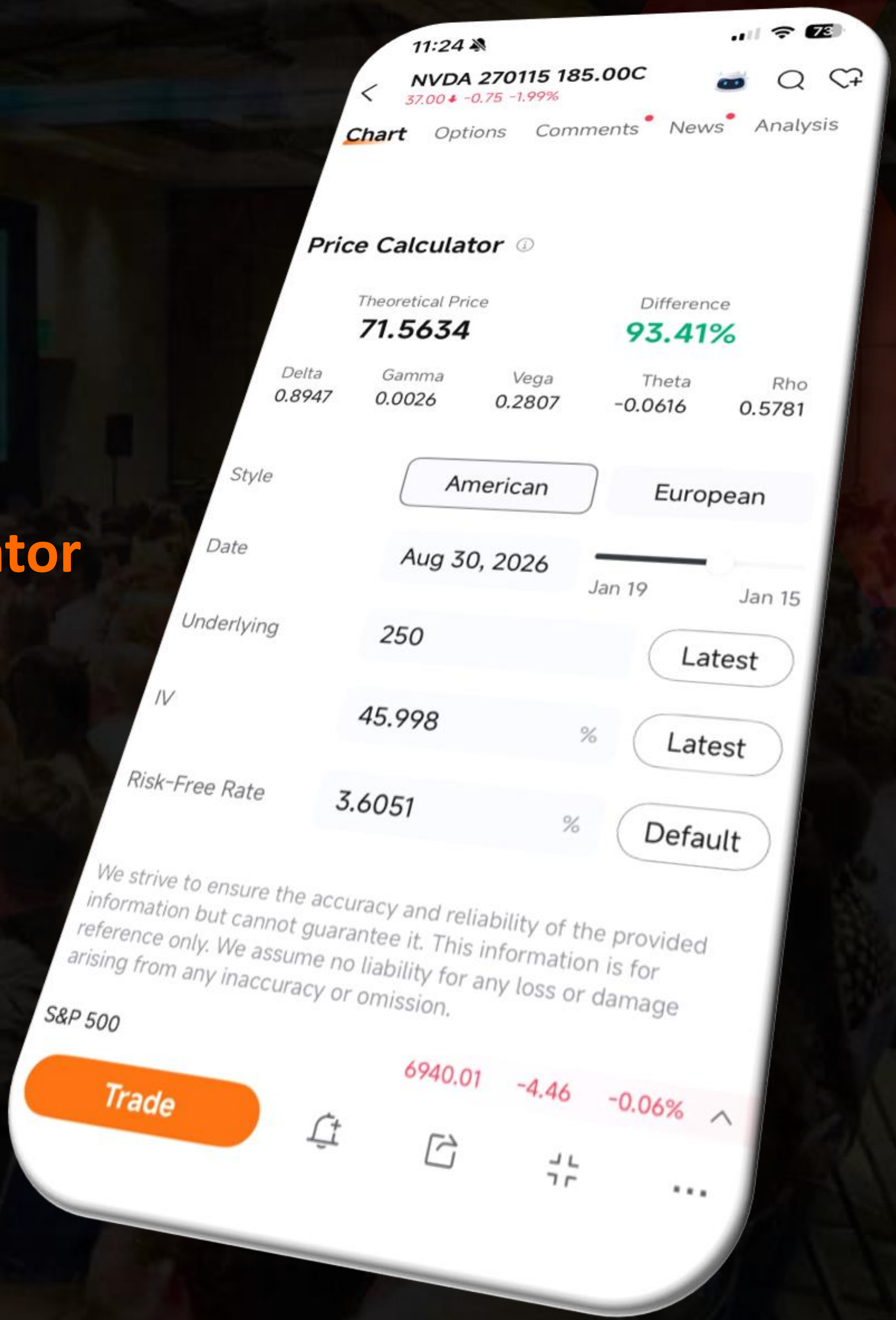
3-in-1: Strategy Builder + Options Curve + Expected Move

(3b) Expected Move (Options Chain)



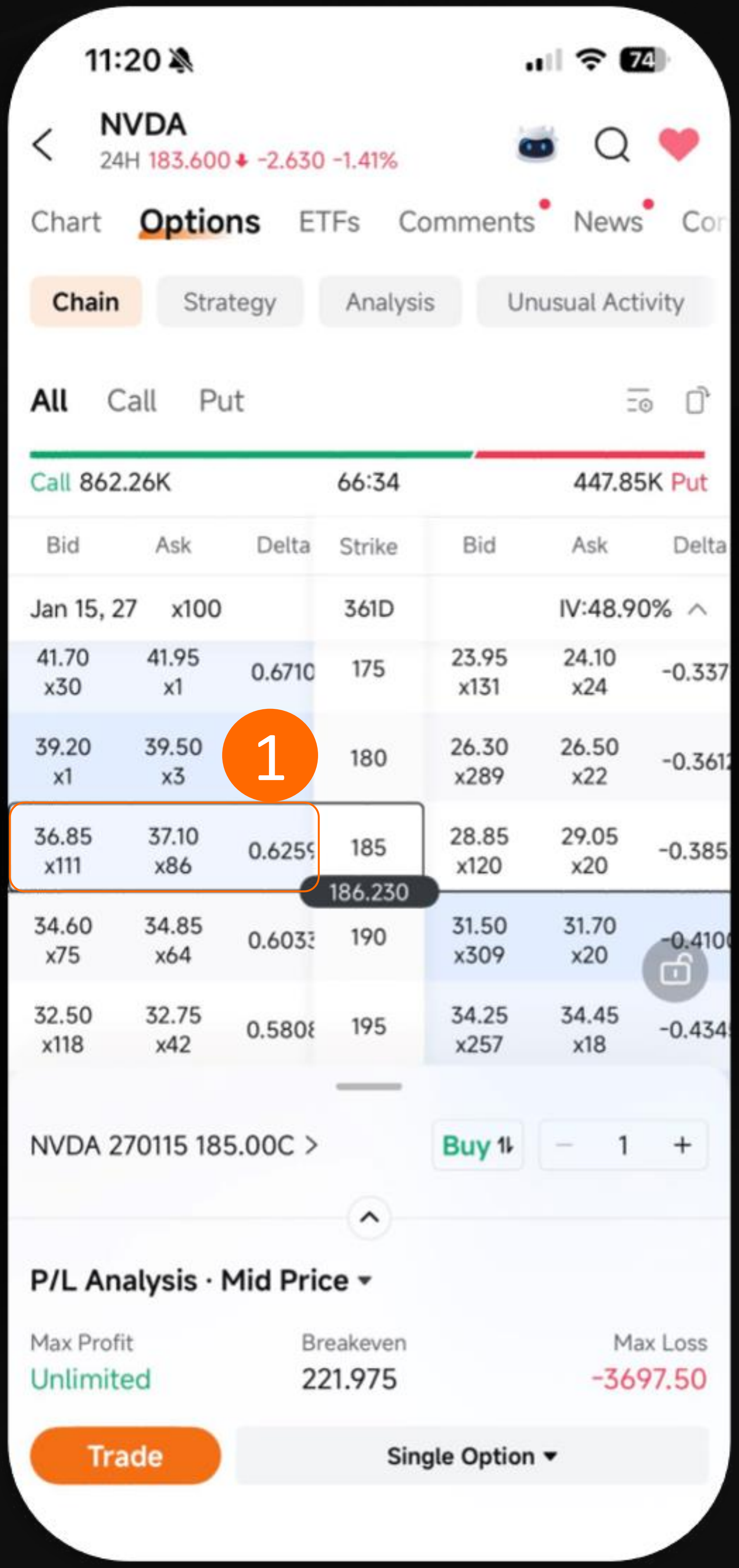
Gamma	Delta	Last	Mid	Volume	Open Interest	Ask	Bid	Strike	Bid	Ask	Open Interest	Volume	Mid	Last	Delta	Gamma
0.0067	0.9195	29.20	28.350	13	256	28.70	28.00	160	0.83	0.86	15.35K	429	0.845	0.87	-0.0803	0.0067
0.0094	0.8738	24.34	23.975	38	145	24.05	23.90	165	1.29	1.32	2.7K	800	1.305	1.34	-0.1187	0.0093
0.0123	0.8215	21.55	19.700	64	339	19.80	19.60	170	1.99	2.02	3.22K	1.38K	2.005	2.03	-0.1722	0.0124
0.0153	0.7536	16.10	15.725	692	1.12K	15.80	15.65	175	2.98	3.05	2.95K	757	3.015	3.09	-0.2419	0.0156
0.0181	0.6700	12.10	12.150	969	2.22K	12.20	12.10	180	4.35	4.45	15.75K	1.89K	4.400	4.50	-0.3274	0.0187
0.0202	0.5734	9.00	9.050	1.52K	6.56K	9.10	9.00	185	6.25	6.35	6.29K	2.45K	6.300	6.35	-0.4271	0.0208
Call 35.92K							[redacted]	187.050 +2.13%				Put 13.27K				
0.0210	0.4696	6.40	6.450	18.26K	33.21K	6.50	6.40	190	8.65	8.75	1.49K	1.18K	8.700	8.80	-0.5345	0.0217
0.0203	0.3660	4.35	4.400	2.88K	9.98K	4.45	4.35	195	11.60	11.75	776	78	11.675	12.00	-0.6416	0.0210
0.0182	0.2708	2.85	2.875	2.68K	9.83K	2.90	2.85	200	15.10	15.30	246	3	15.200	15.35	-0.7396	0.0189
0.0151	0.1913	1.81	1.820	4.19K	10.64K	1.84	1.80	205	19.10	19.25	134	4	19.175	18.10	-0.8232	0.0158
0.0118	0.1304	1.13	1.130	1.88K	3.6K	1.15	1.11	210	23.40	23.85	63	144	23.625	23.15	-0.8809	0.0127

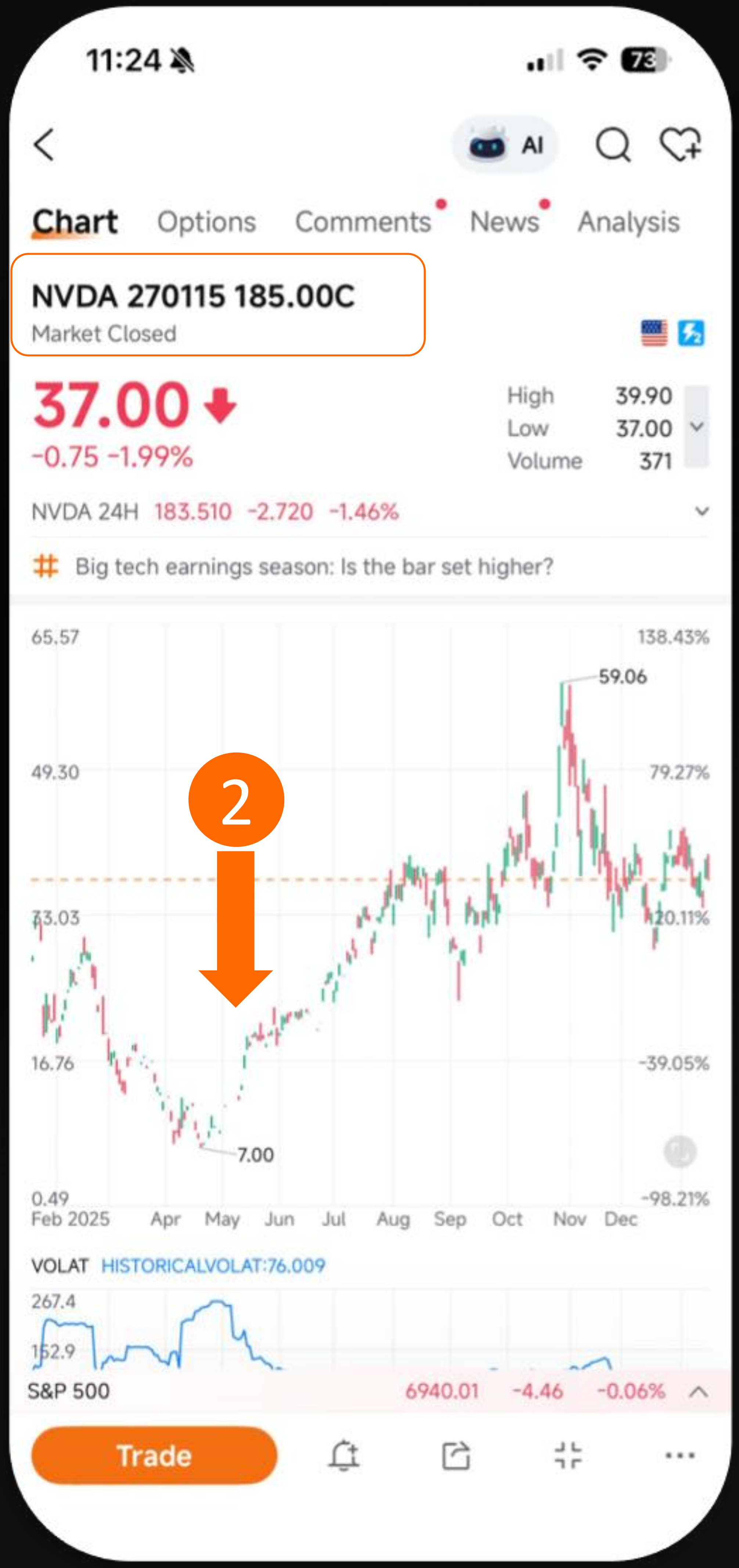
From Analysis to **Action**: Option **Calculator**

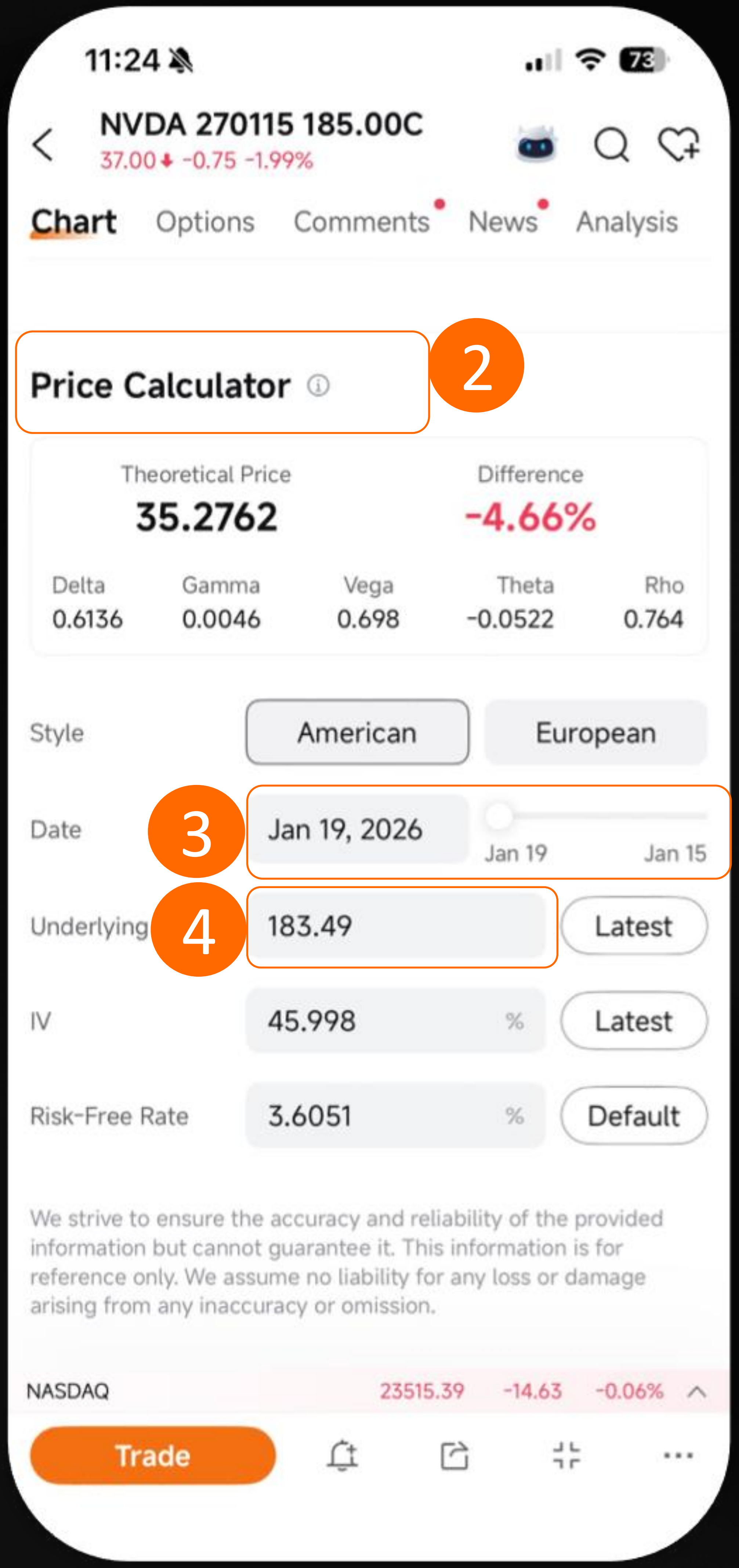


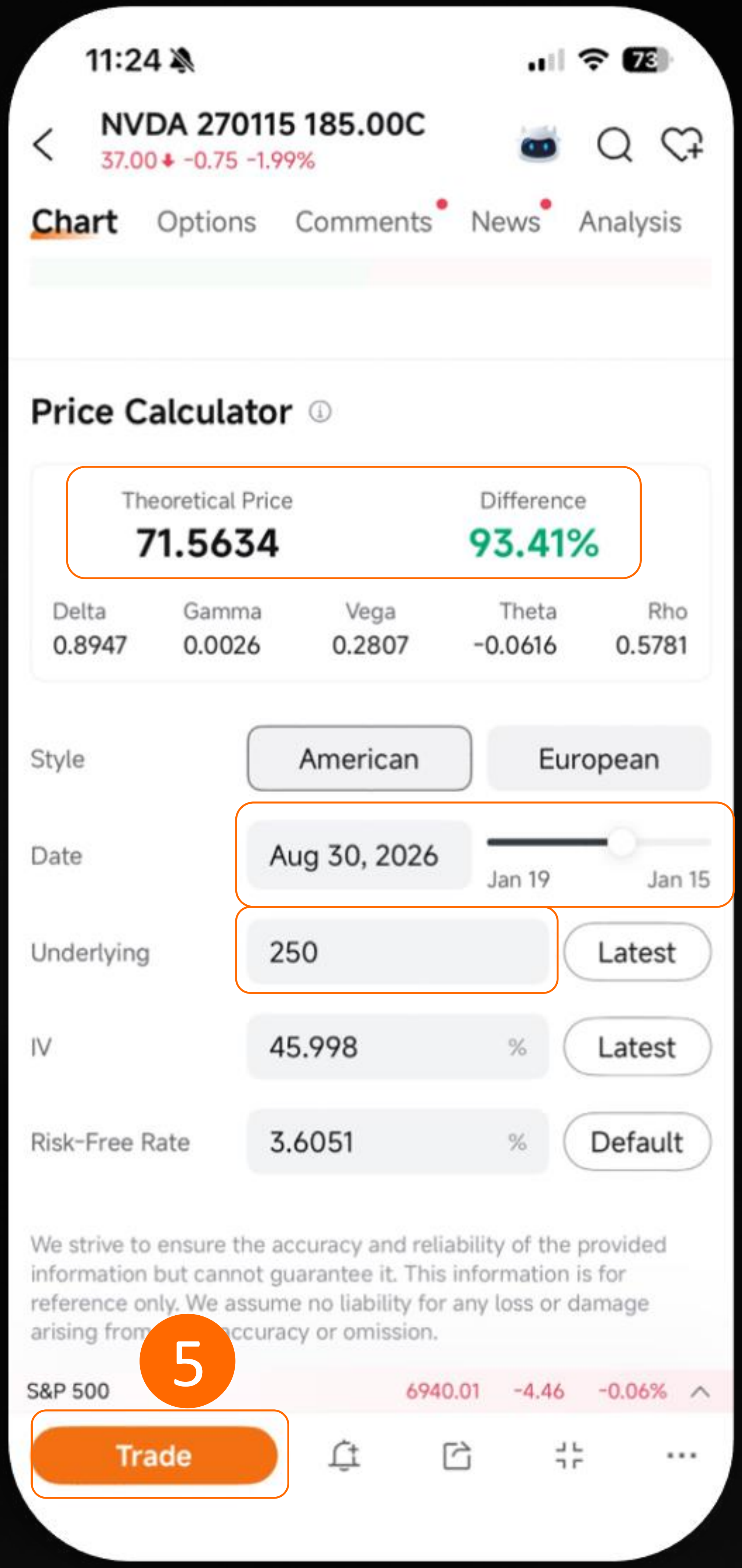
moomoo

From Analysis to Action: Option Calculator









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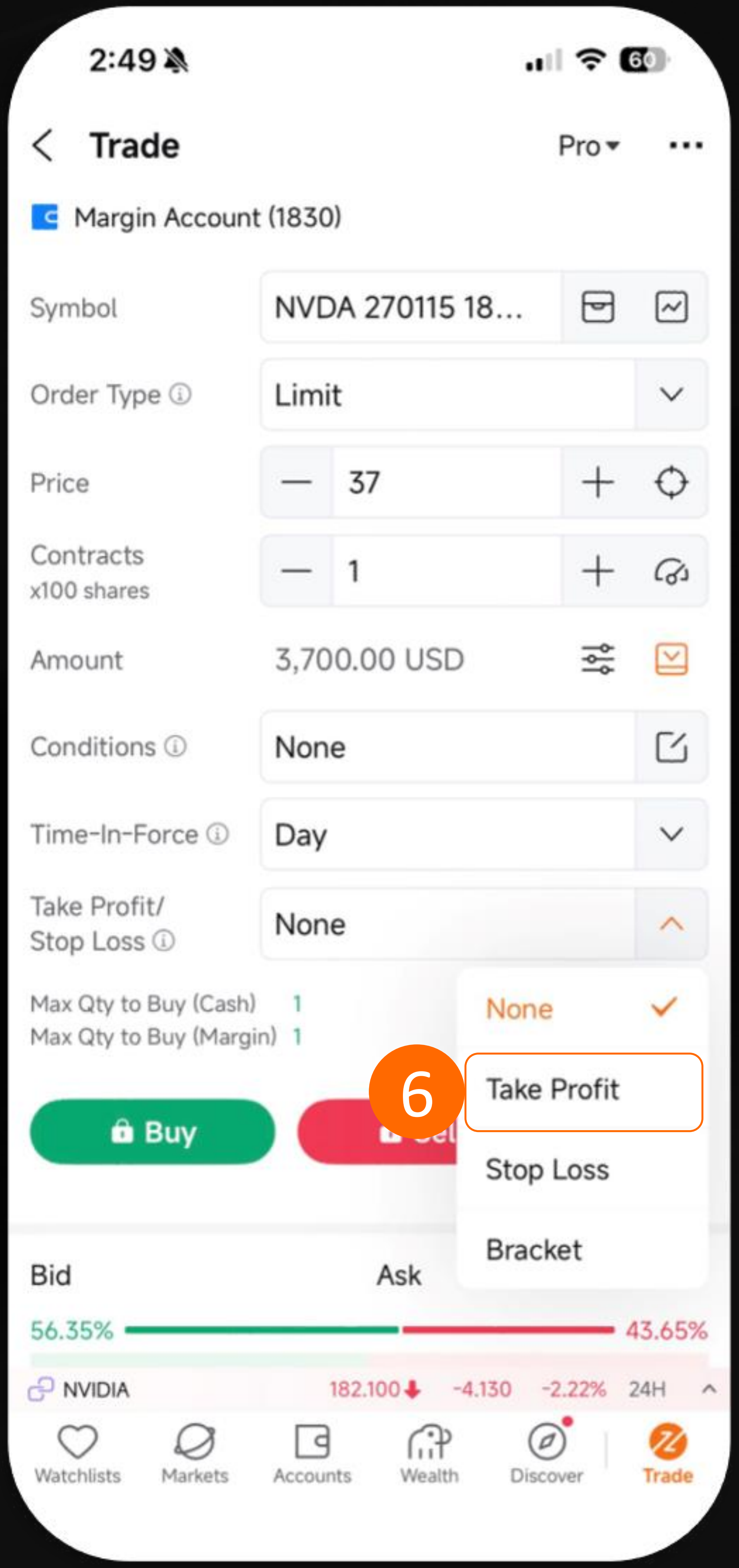
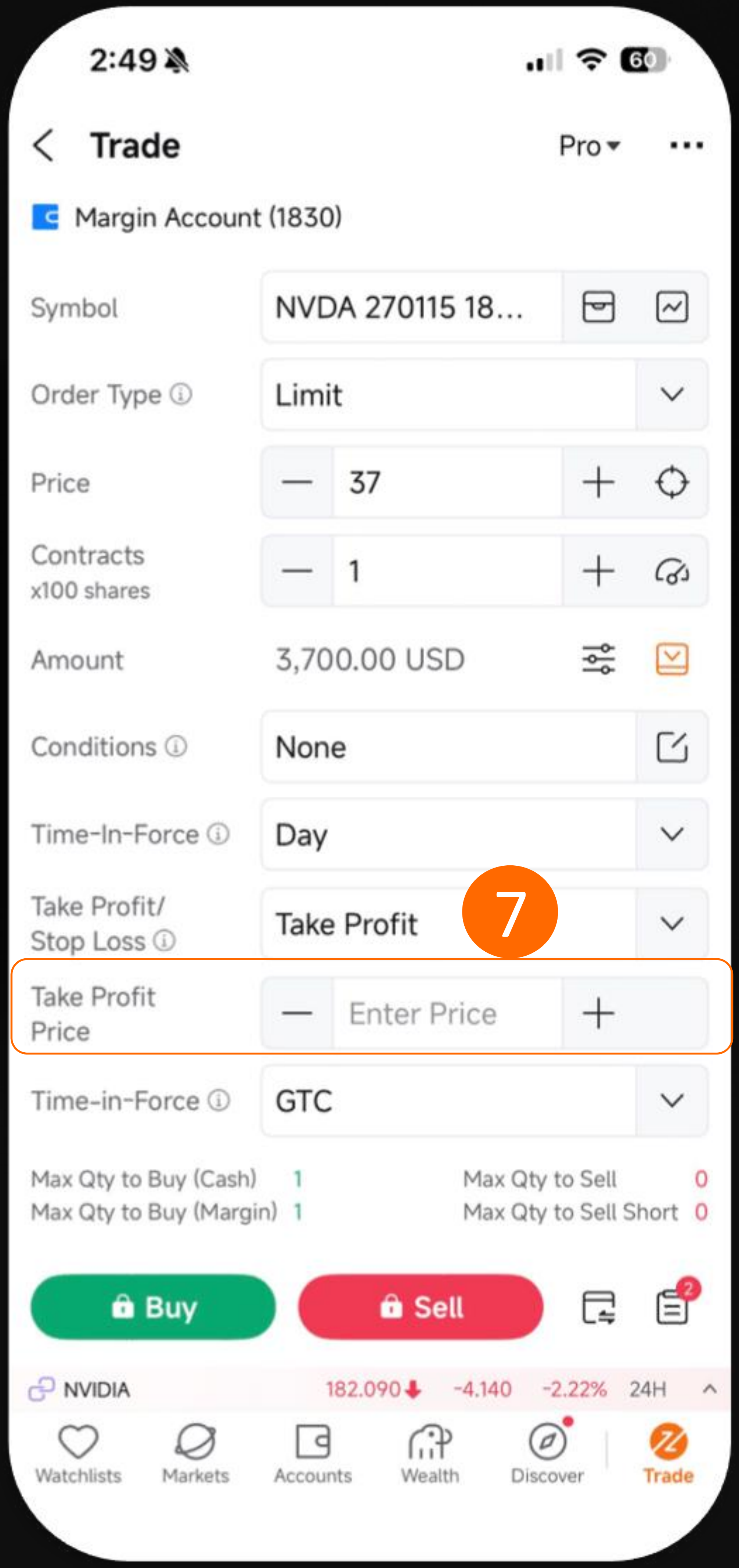
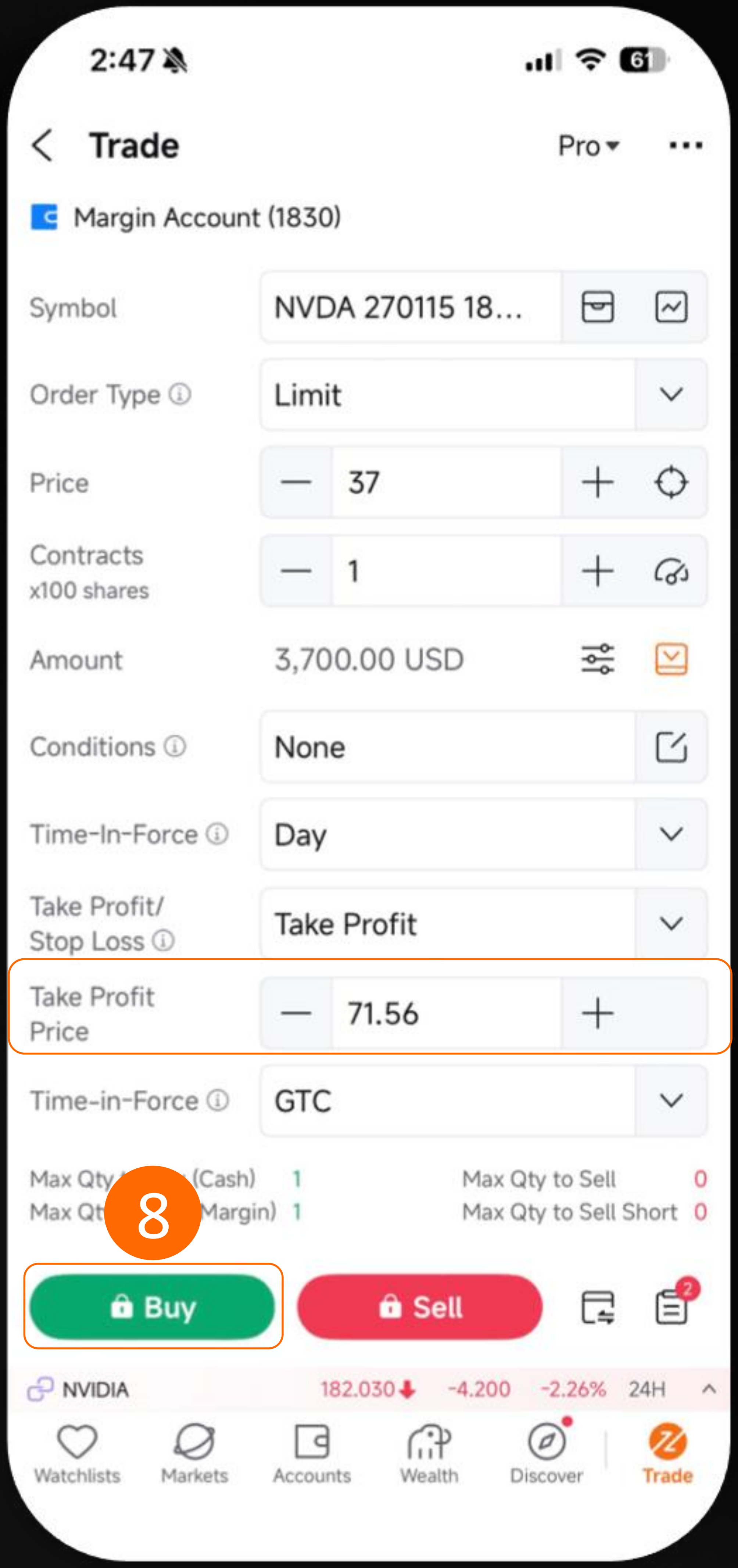
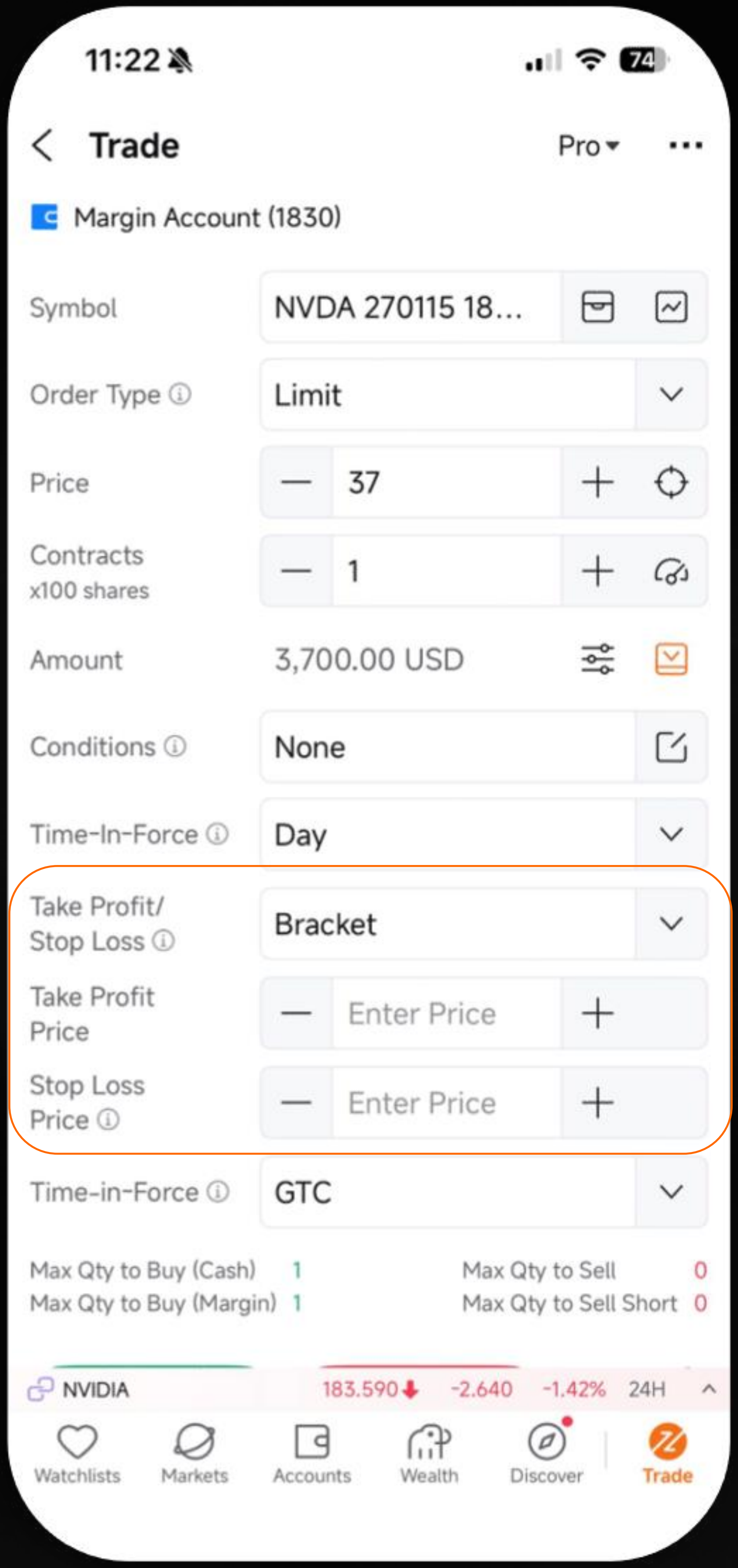
From Analysis to **Action**: Option **Calculator**









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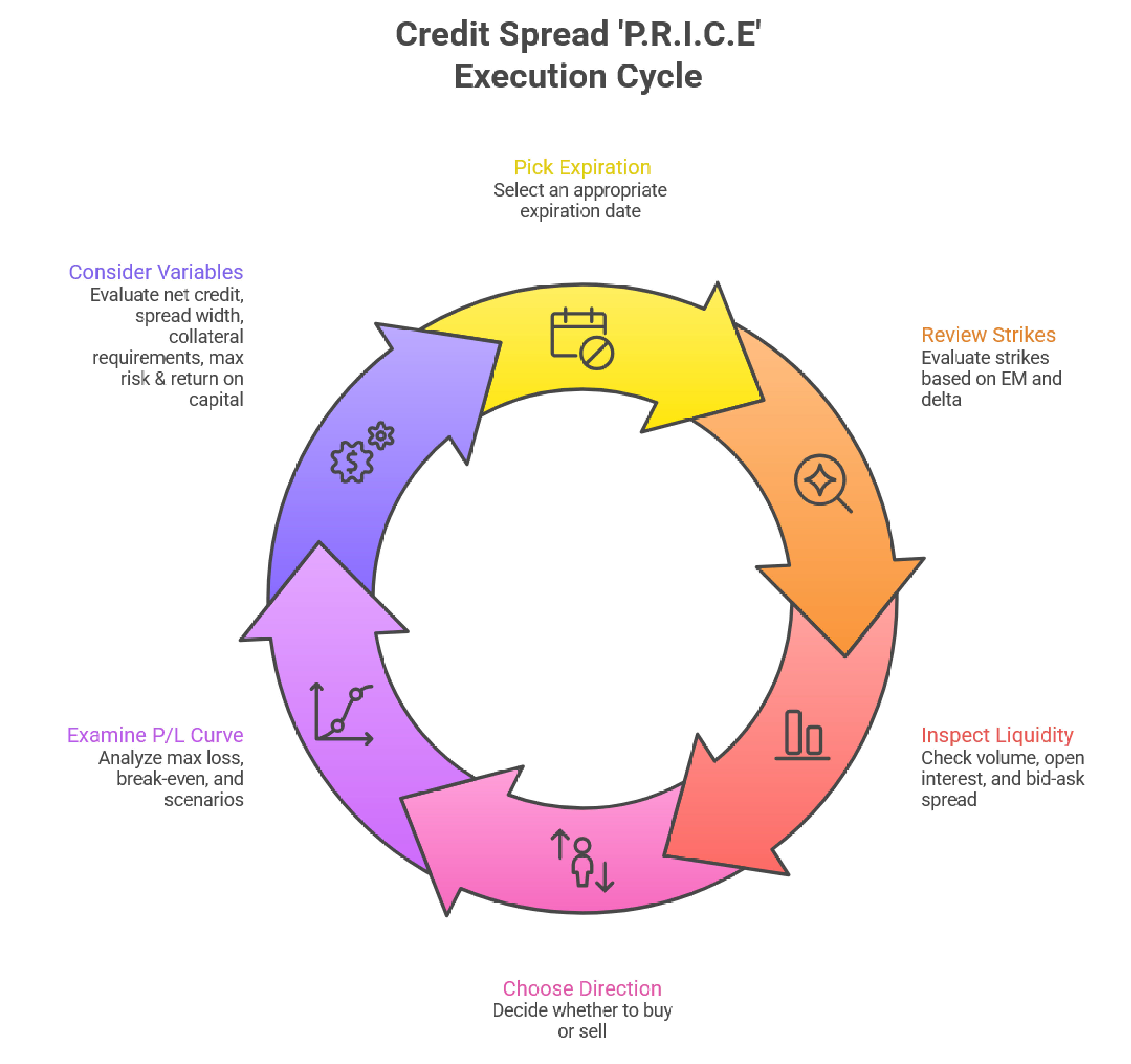
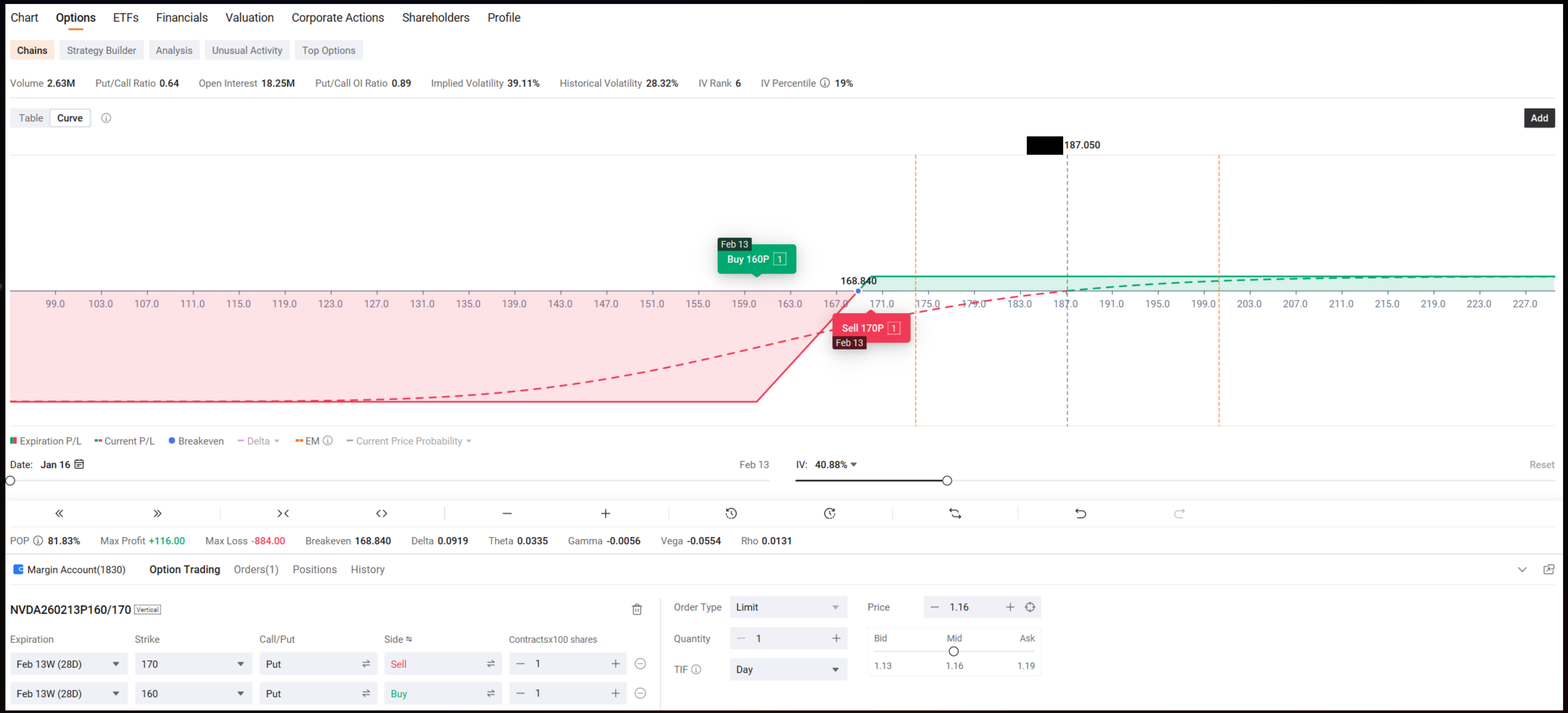
Why do Options Spread on Moomoo Desktop?



Put Options Spread on Moomoo Desktop



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Scenario A: The Win

Price: Stay above $168.84 upon expiration > Keep $116 credit (income)

Scenario B: The Loss

Price: Stay below $168.84 upon expiration > Lose $1000 (spread width) minus $116 credit received, max loss = $884

Variables to Consider:

28 DTE Bull Put Spread

Net Credit (Income) = $1.16

Spread Width = $170 - $160 = $10 width

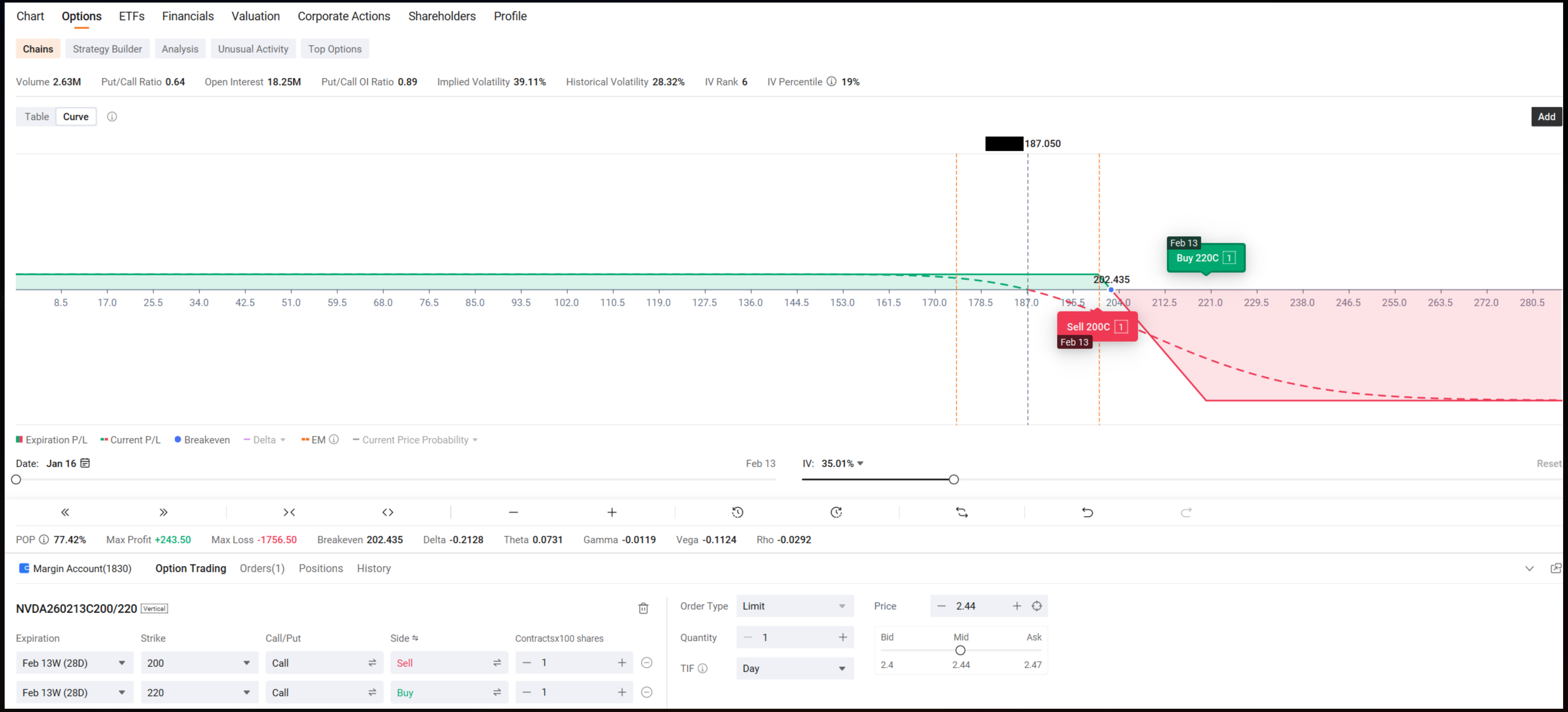
Collateral Requirement = $10 width x 100 = $1000 capital

Max Risk = Collateral - Credit Received (as Max Loss)
= $1000 - $116 = $884 Max Loss

Return on Capital = Profit / Risk = % ROI (if held to Max Profit)
= $116 Profit / $884 Risk = 13.12% ROI

Theoretically, $116 Profit / 28 DTE = $4.14 on average per day as long as price stay above $168.84 break-even upon expiration

Call Options Spread on Moomoo Desktop



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Scenario A: The Win
Price: Stay below $202.44 upon expiration > Keep $244 credit (income)

Scenario B: The Loss
Price: Stay above $202.44 upon expiration > Lose $2000 (spread width) minus $244 credit received, max loss = $1756

Variables to Consider:

28 DTE Bear Call Spread

Net Credit (Income) = $2.44

Spread Width = $200 - $180 = $20 width

Collateral Requirement = $20 width x 100 = $2000 capital

Max Risk = Collateral - Credit Received (as Max Loss)
= $2000 - $244 = $1756 Max Loss

Return on Capital = Profit / Risk = % ROI (if held to Max Profit)
= $244 Profit / $1756 Risk = 13.89% ROI

Theoretically, $244 Profit / 28 DTE = $8.71 on average per day as long as price stay below $202.44 break-even upon expiration

Agenda

The Story of Alfredo Holguin

US Investing Championship
@USICOfficial

Congratulations to Alfredo Holguin of holguintrades.com for finishing up 100.2% in the 2025 USIC enhanced growth division. Alfredo is completely blind.

holguintrades.com
Totally Blind Options Trader & Keynote Speaker in San Die...
Totally blind options trader and keynote speaker Alfredo Holguin in San Diego, California. Weekly options insights ...

(1) The 'Capital Magic'

3-in-1 Options for Income: Options Premium + Margin Yield + Rolling for More Premium

Short Put Strategy:
Unlock Three Potential Returns

On moomoo, when you use a sell put strategy, you can earn from three sources:

Earn Options Premium

Premium from selling put options.

Moomoo Exclusive

Earn Margin Yield

Option margin may earn interest when placed in Cash Plus with Smartsave enabled. (USD Cash Plus at 3.7%p.a., SGD Cash Plus at 1.3%p.a..)

Moomoo Exclusive

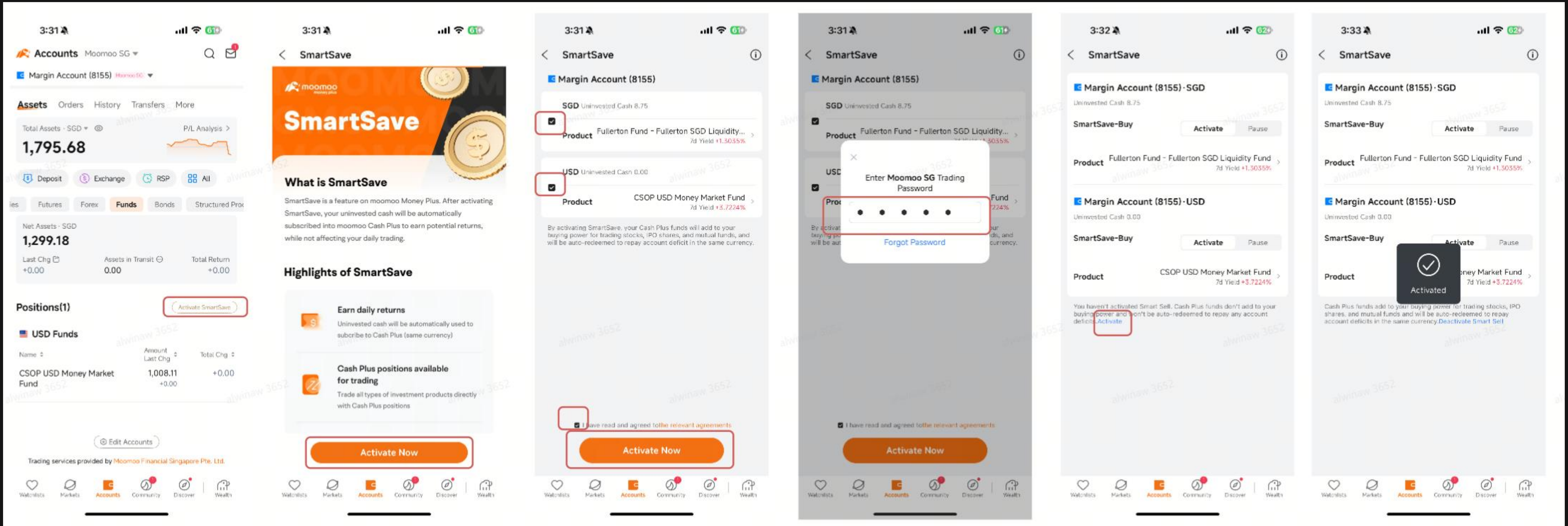
Roll to Keep Earning More Premium

Option premiums may be invested into other funds or products.

This strategy does not guarantee income and assumes that the option is OTM. Options trading is complex, involves significant risk, and may not be suitable for all investors. Losses may exceed the option premium received.
*Data as of 21 Jan 2026. Past performance is not indicative of future performance.

Moomoo App 'Triple Yield' Activation:

1a) **First time User:** SmartSave Activation



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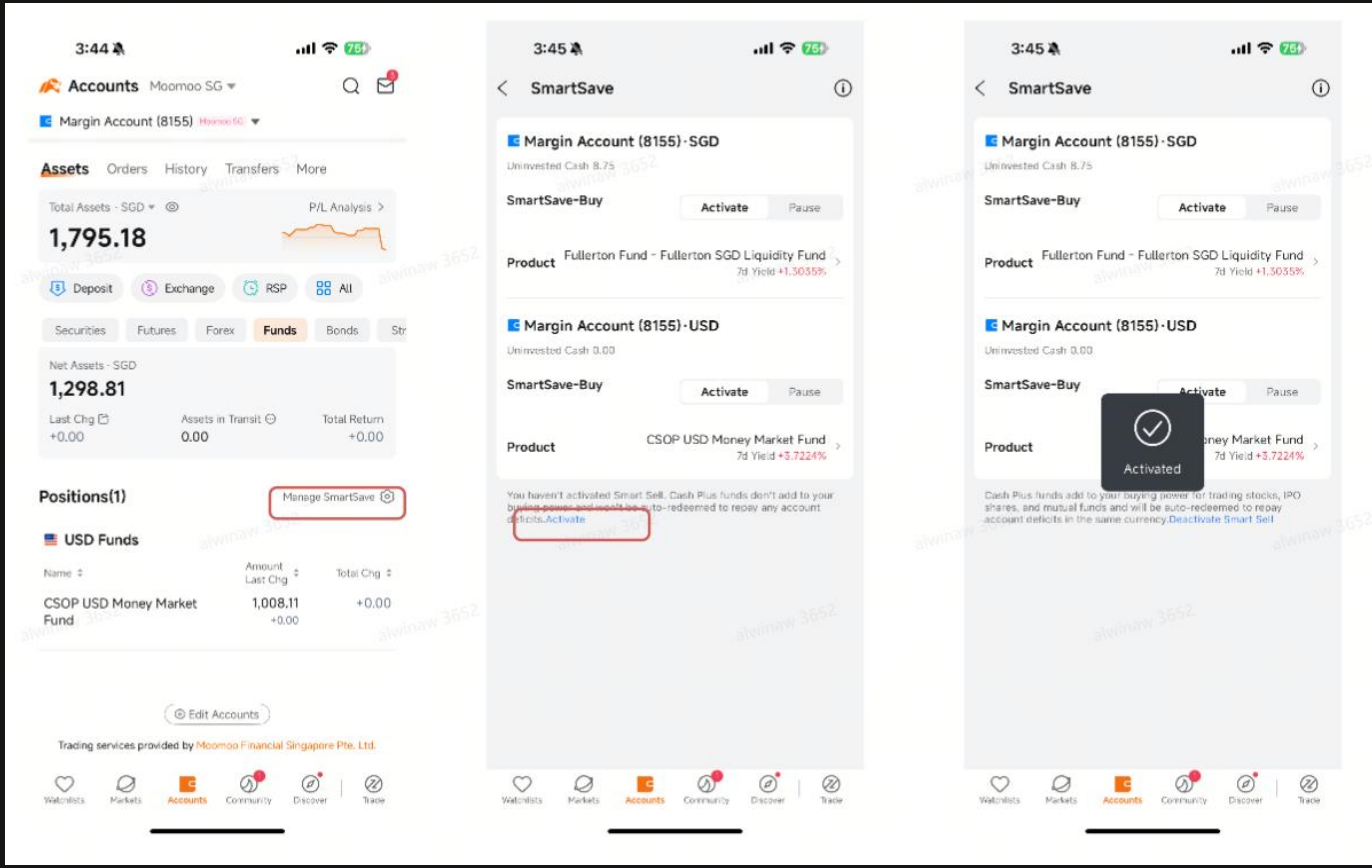
Moomoo App 'Triple Yield' Activation:

1b) **Existing User:** SmartSave Activation

Accounts > All > Financing (SmartSave) > Activate Smart Sell



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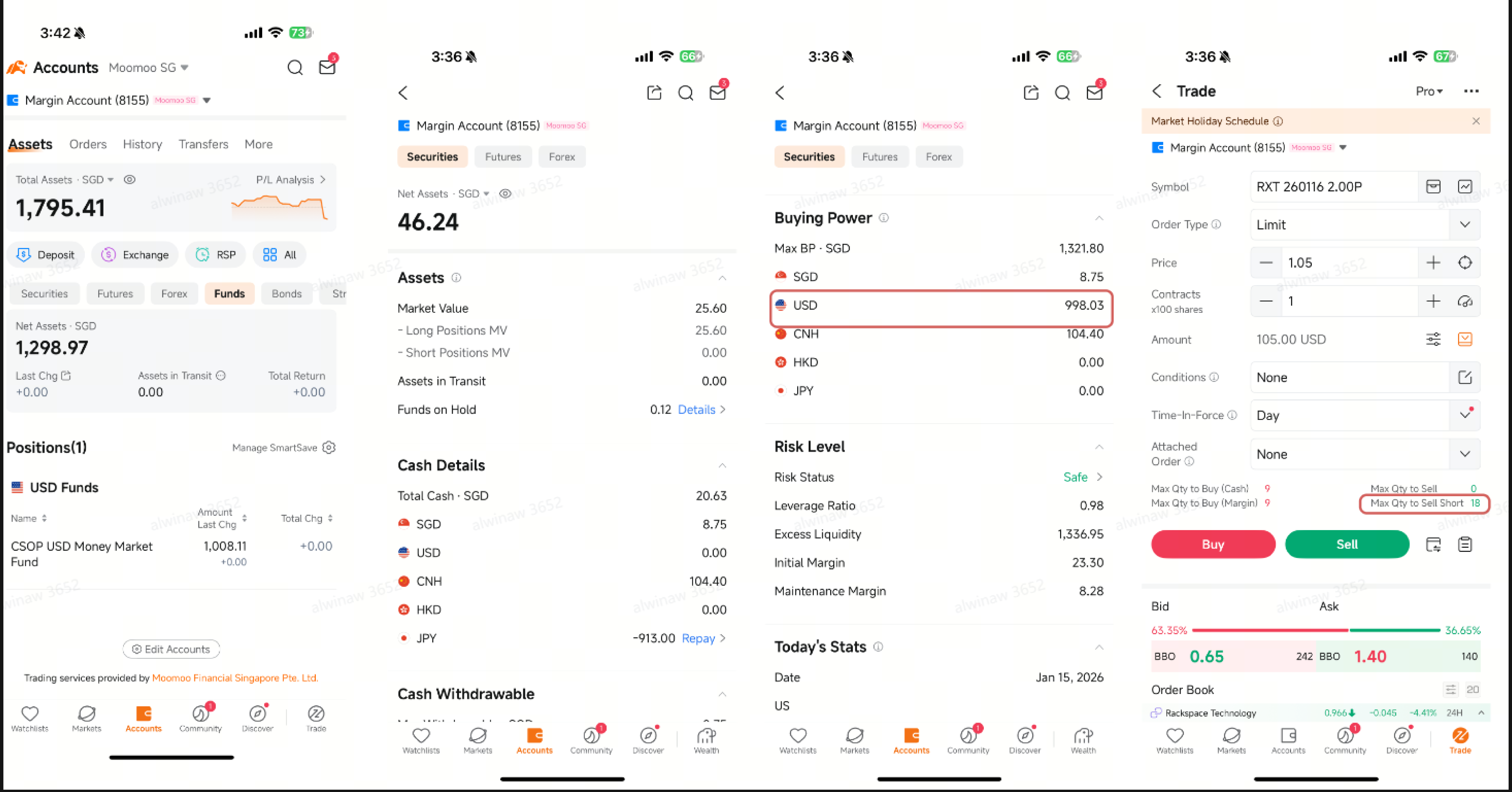
2) Double Check 'Securites' Max Buying Power = Funds Balance

USD cash buying power =
$1008.11 x 99% = $998.03

Max Qty to Sell Short = 18



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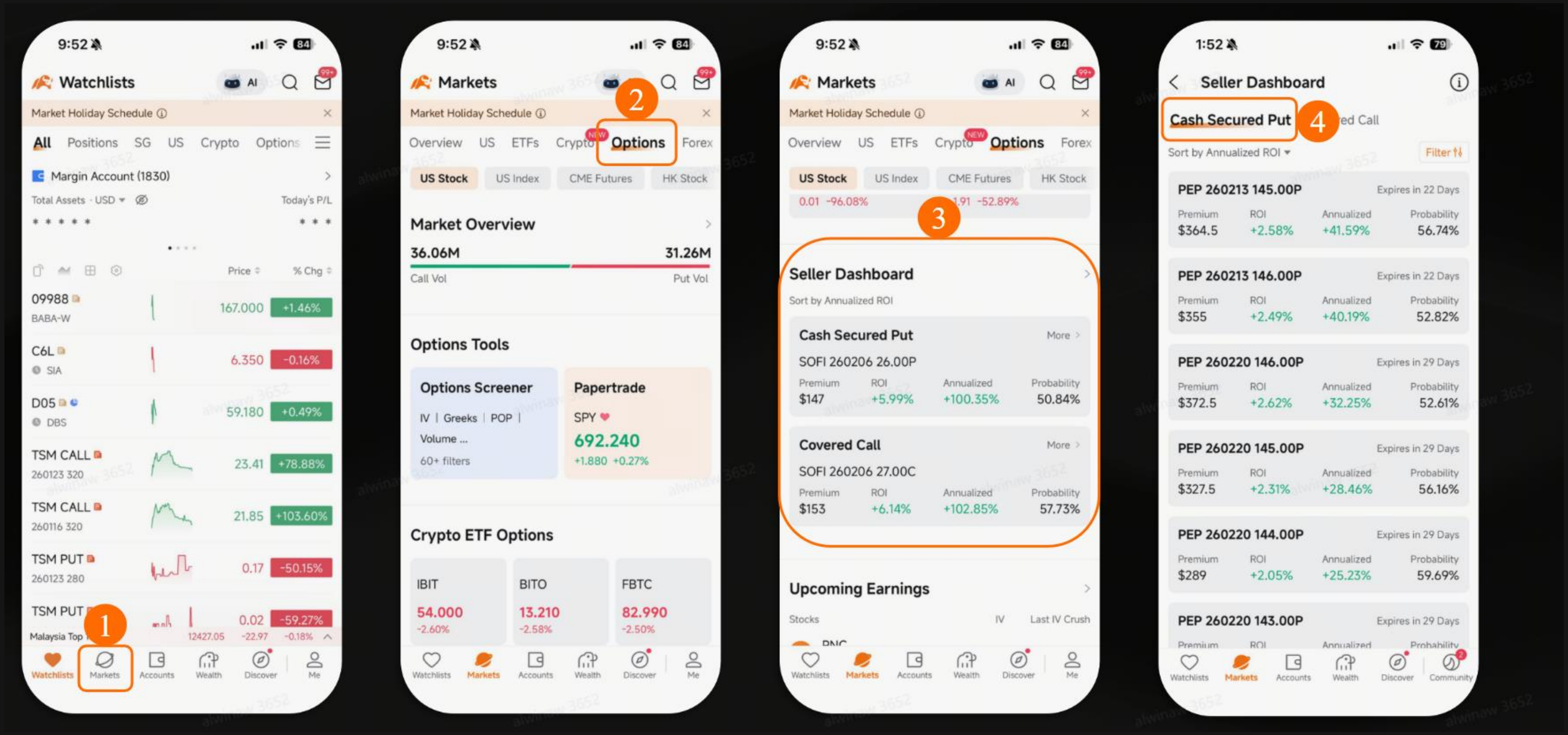
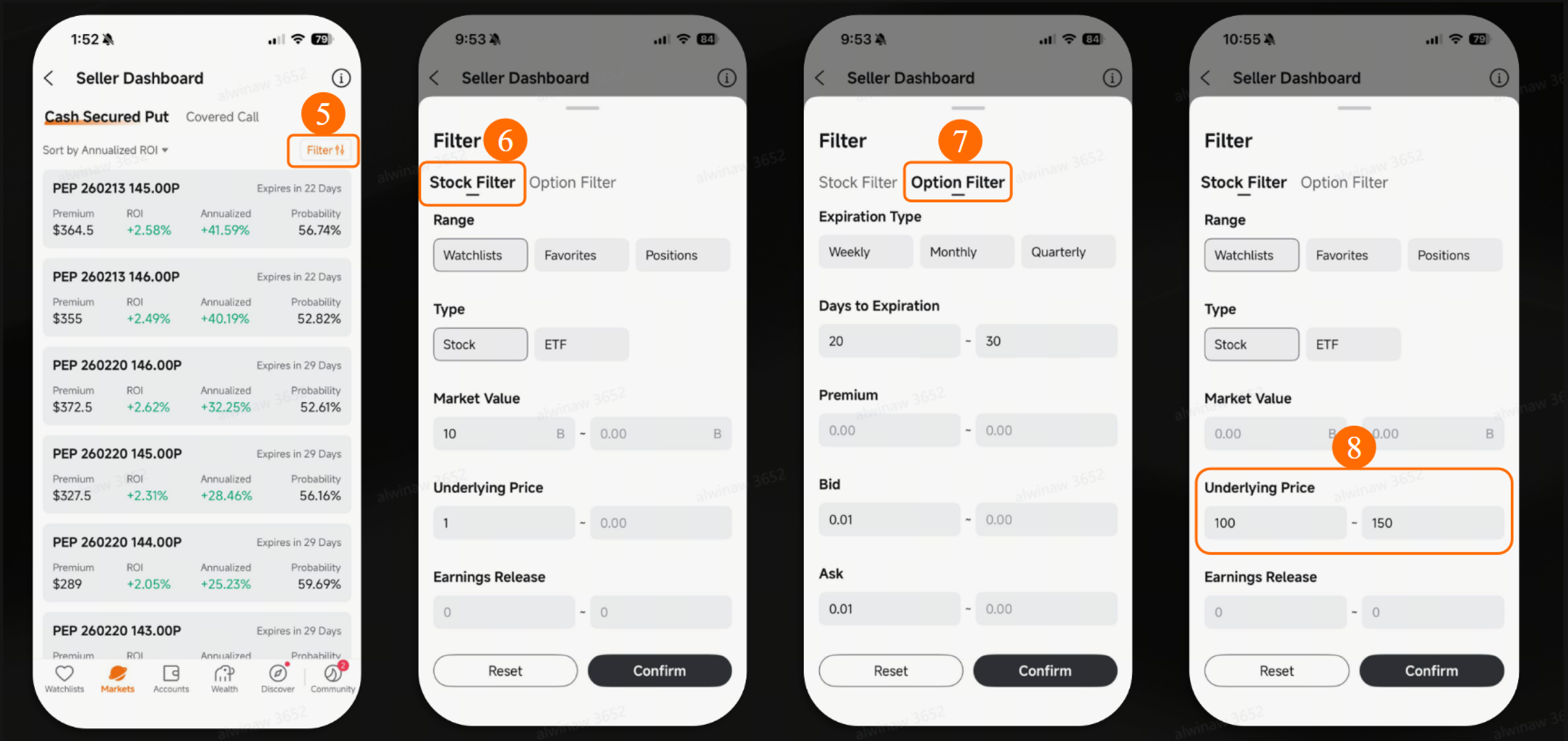
3) Options Seller Dashboard to scan and select a 'sell leg' to trade





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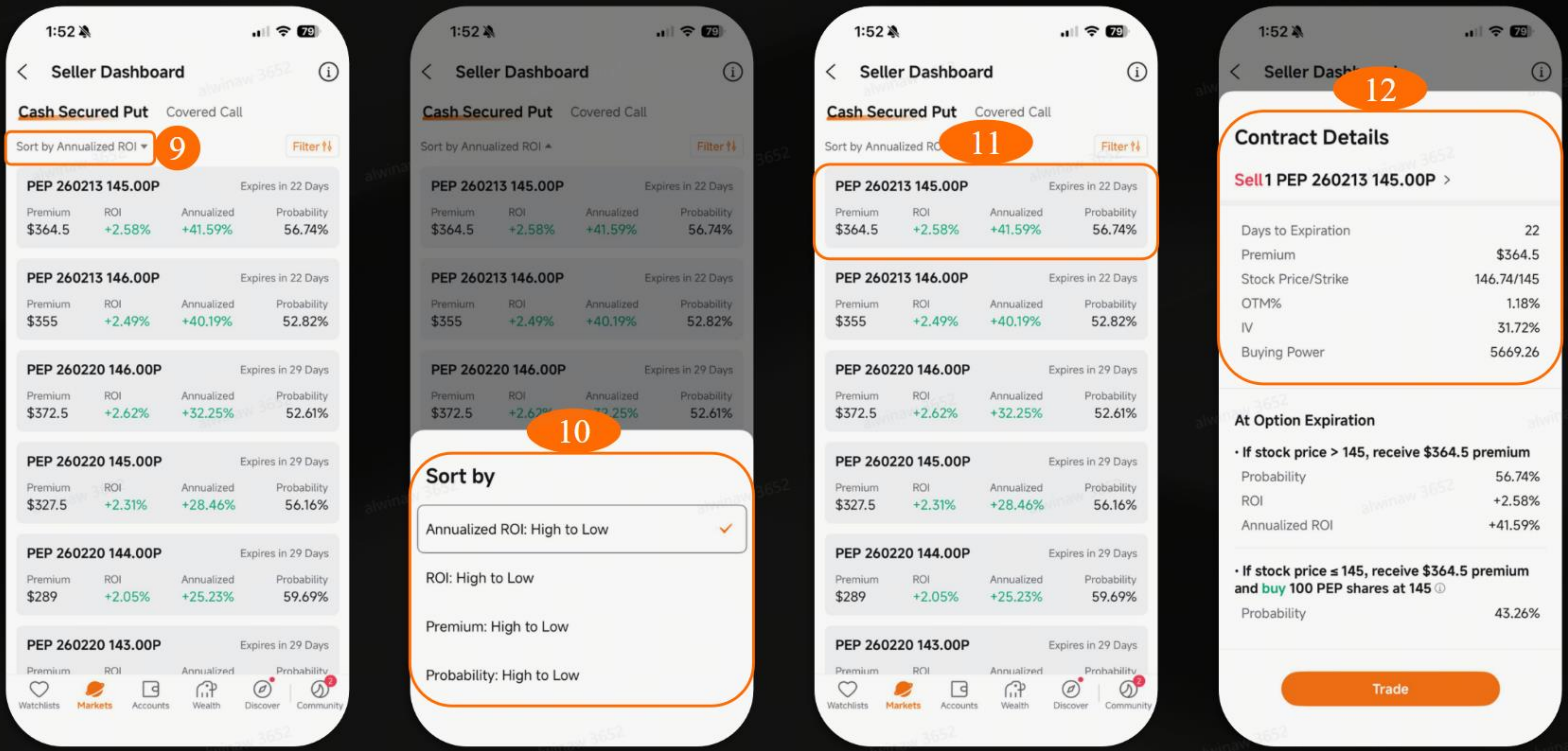

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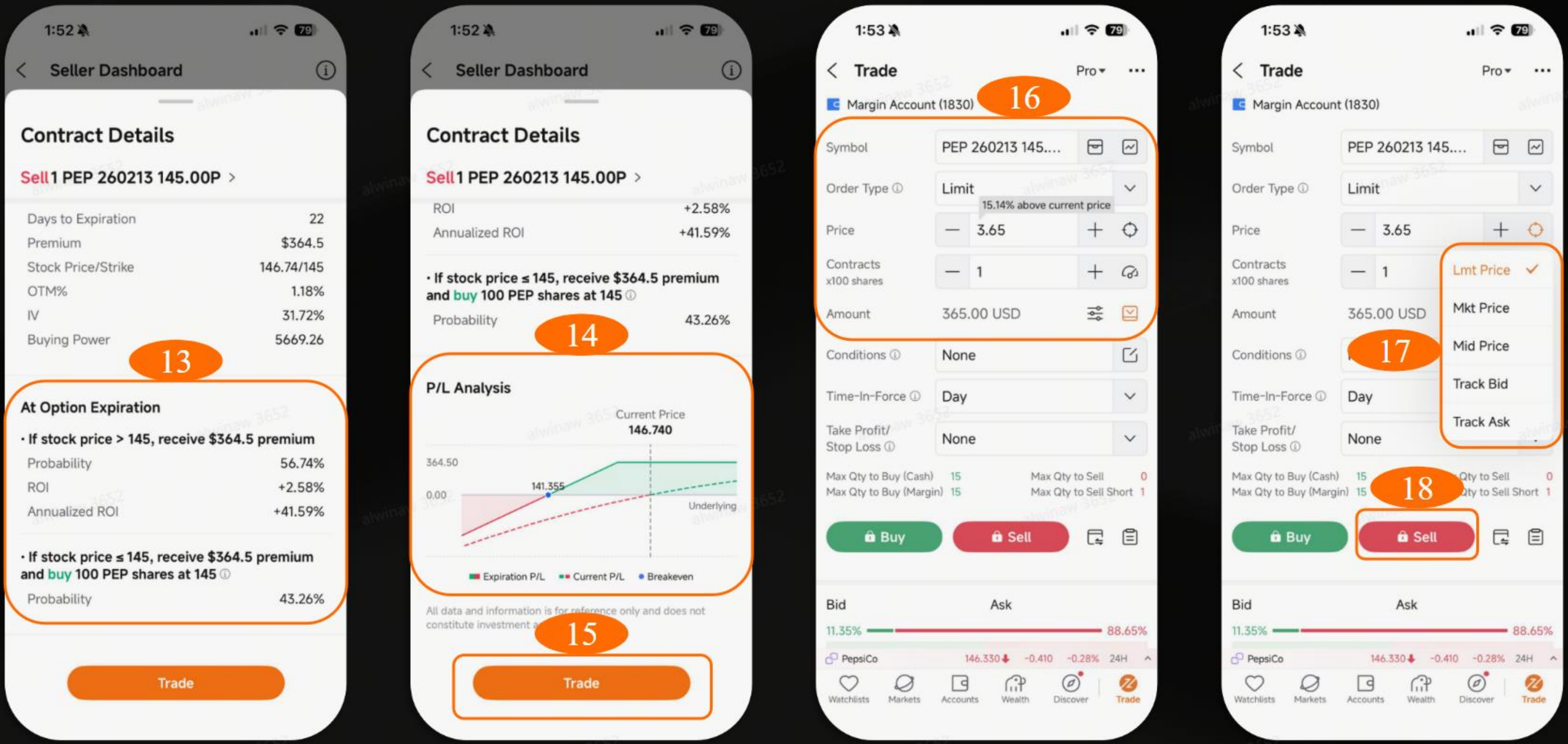

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4) 1st Benefit: Option Premium (variable income filters)

A. ROI (Return on Investment) = immediate yield based on capital 'at risk' (strike price - premium collected)

- Cash-secured Put: Premium / (Strike Price x 100 - Premium)

- Covered Call: Premium / (Stock Price x 100 - Premium)

B. Annualized ROI = compare against yearly benchmark (like S&P500 returns)

- Cash-secured Put: [Premium / (Strike Price x 100 - Premium)] * (365 / Days to Expiry)

- Covered Call: [Premium / (Strike Price x 100 - Premium)] * (365 / Days to Expiry)

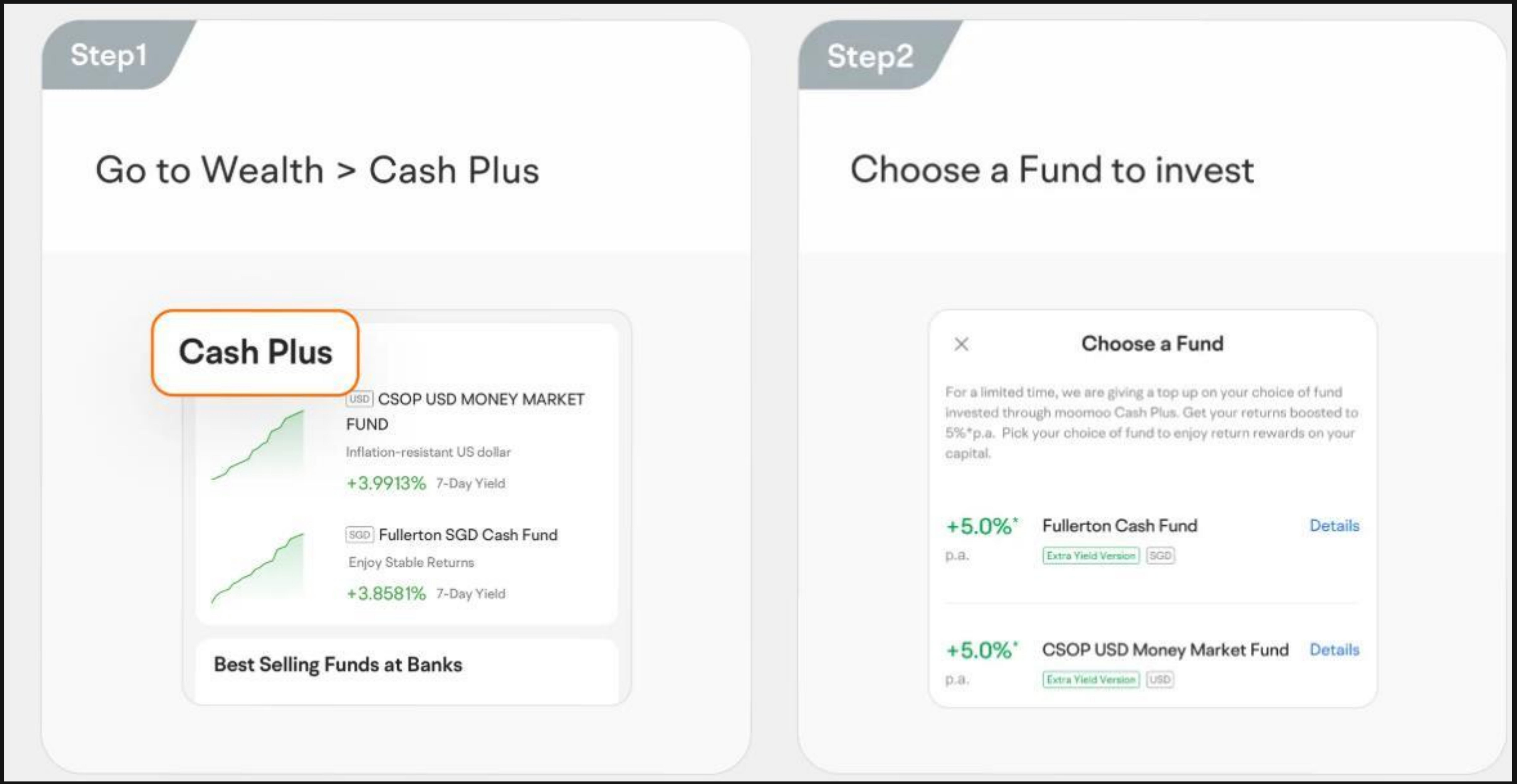
C. Total Premium = immediate cash deposit received when opening the trade as a 'sell put'

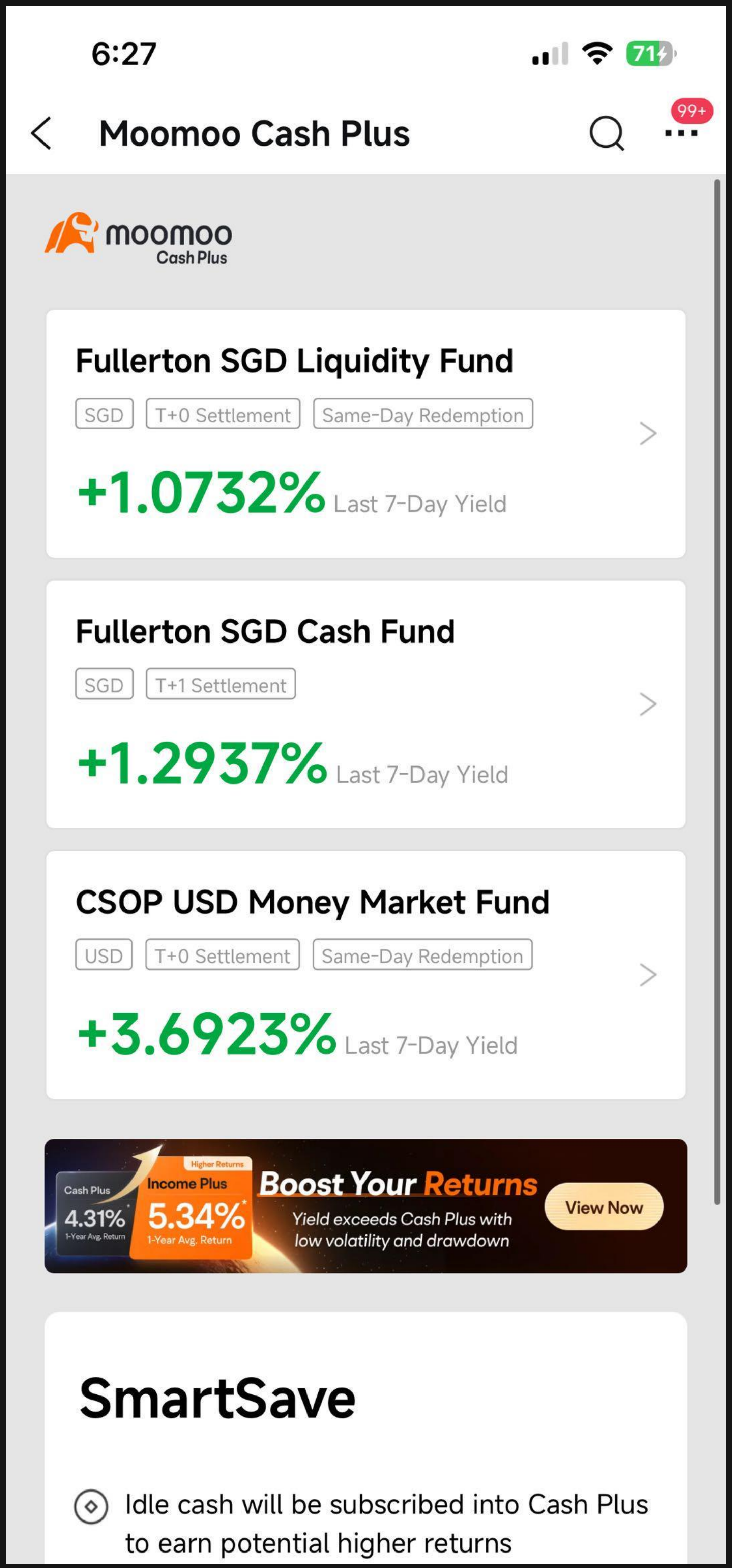
- Premium per Share * Option Multiplier

D. OTM Probability = 70% or higher OTM as a general guideline for stock to stay above strike price in order to keep the full premium

- Higher probability indicates a better probability of keeping the premium without contract assignment (favorable for sellers)

5) 2nd Benefit: Moomoo CashPlus (fixed income selections with money market funds)





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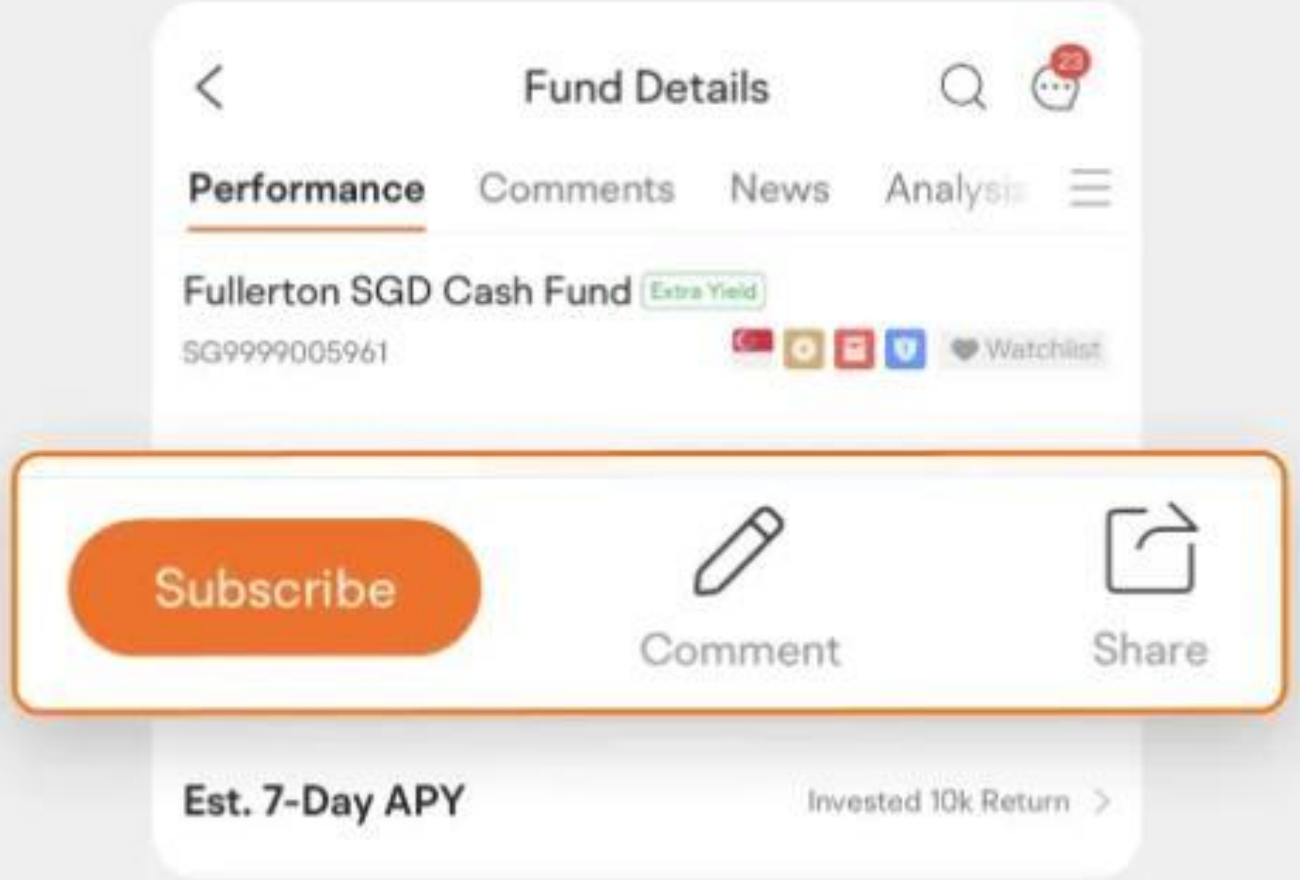
As of 22/1/2025

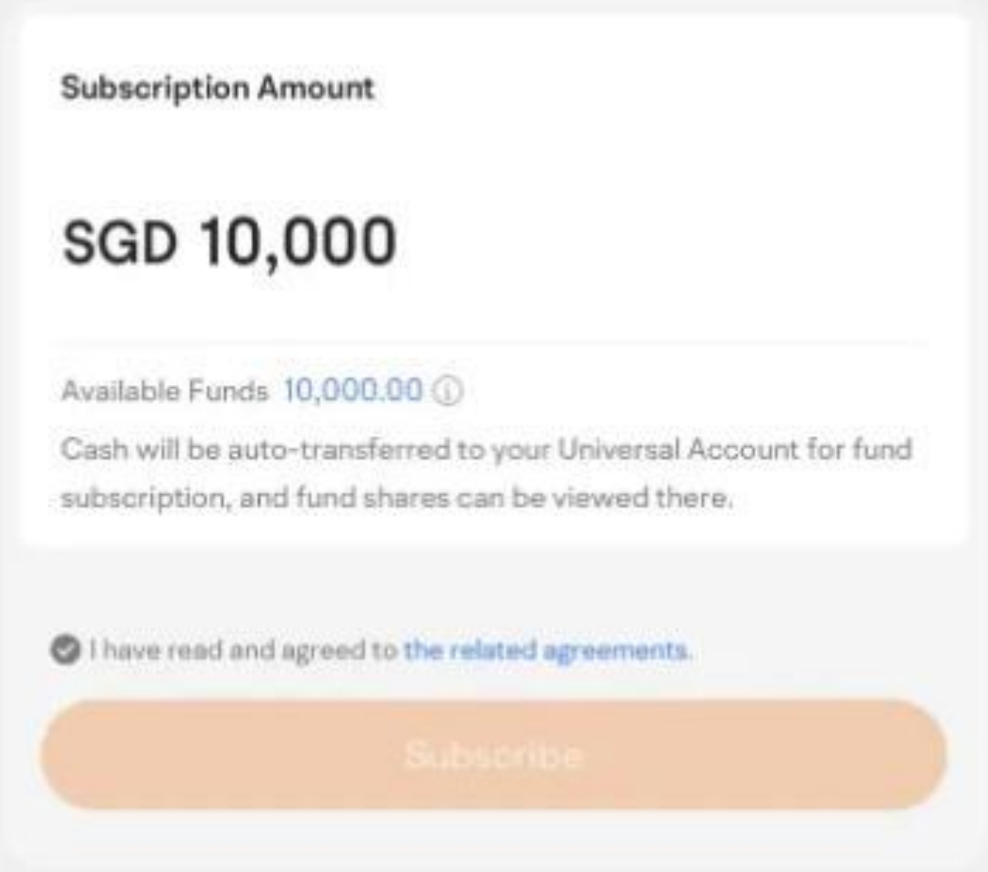
Step3

Click "Subscribe"



Step4

Enter the Subscribe Amount



Step5

Enter your password and complete the subscription

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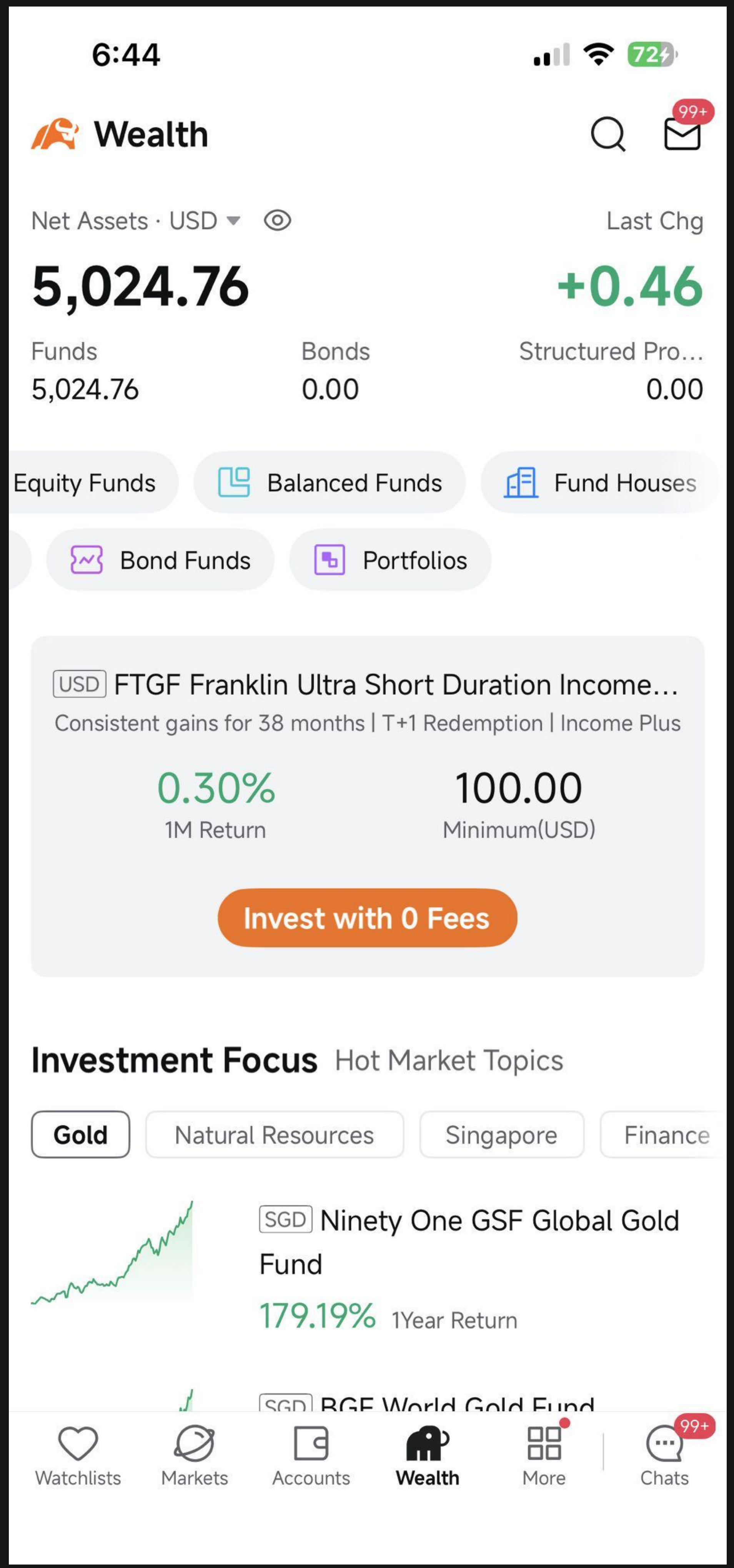
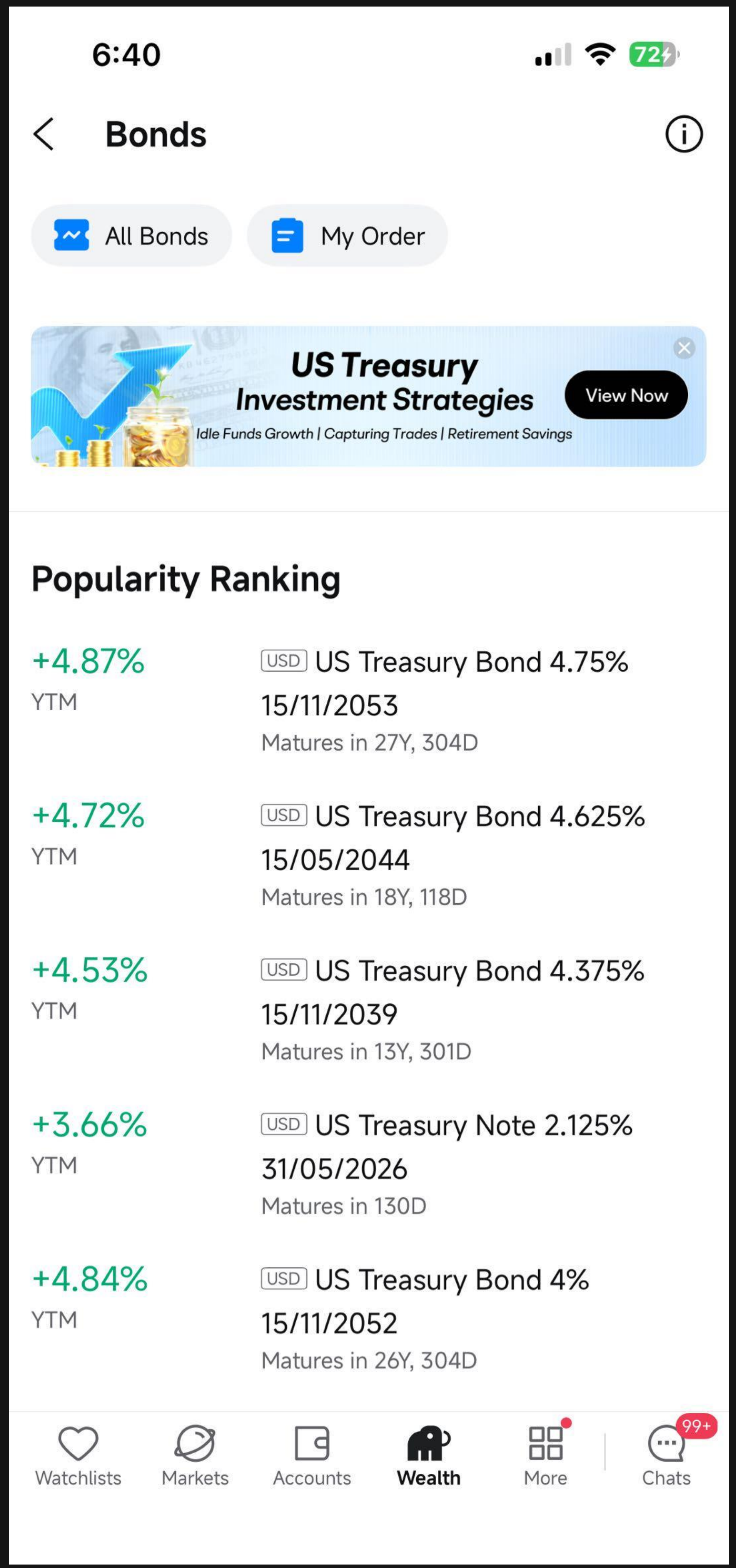
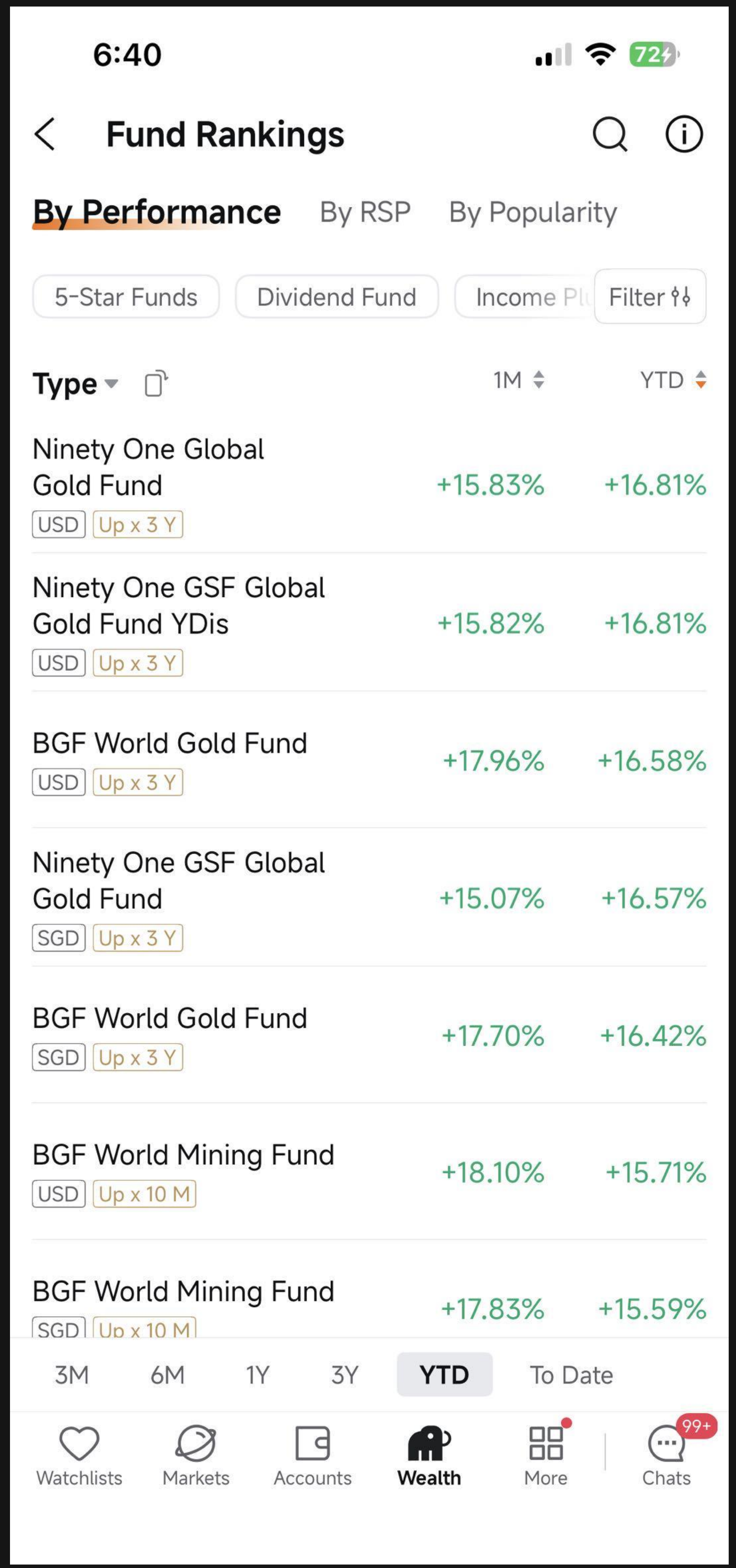
7) 3rd Benefit: Options Rolling for more Premium or Idle Cash to Build a Diversified Portfolio (Moomoo FundPlus)



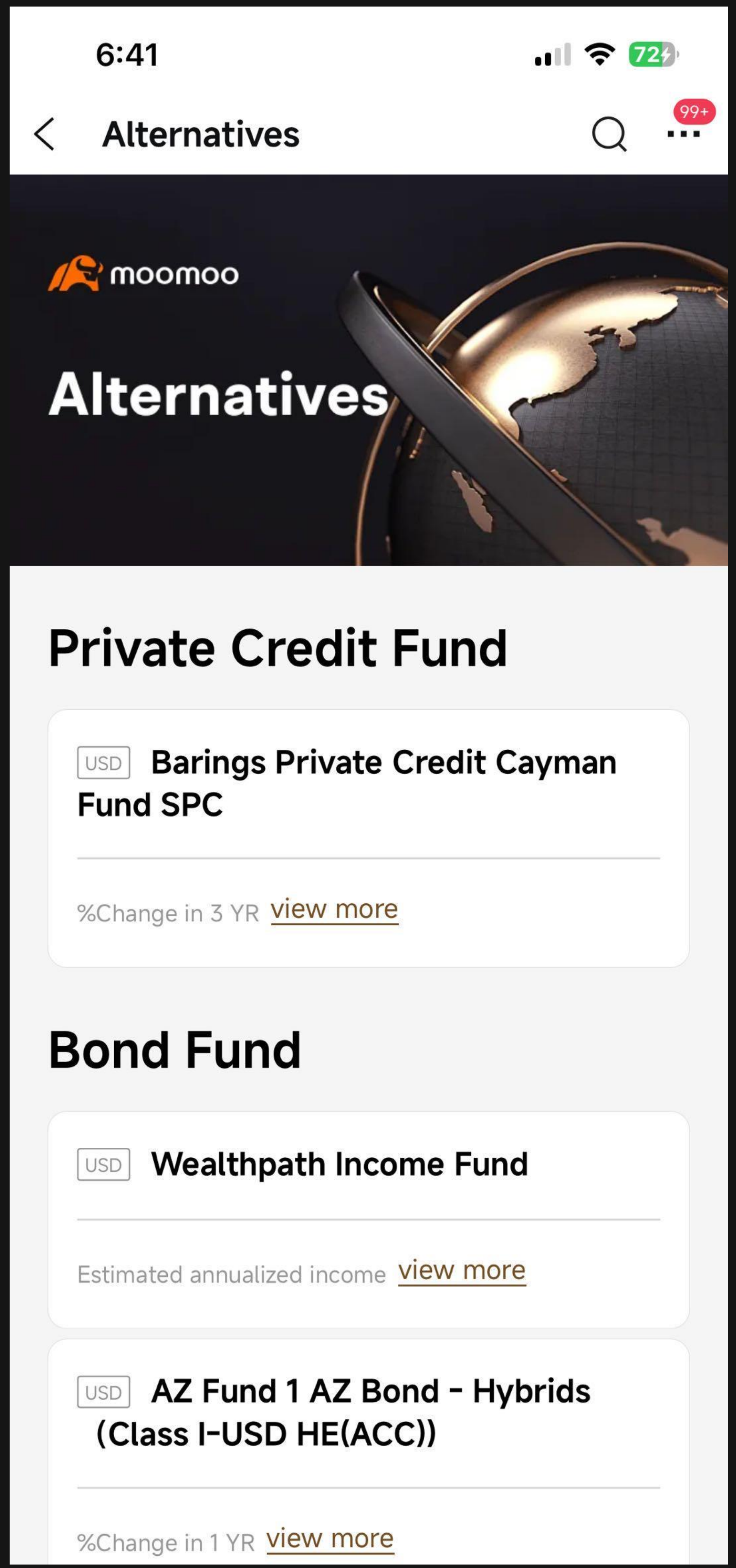
App > Wealth



Bond Funds



Fund by Performance



Alternative Funds

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Buy Shares vs Option Spreads

Risk:Reward	Traditional Holding (Level 1)	$10 Width Vertical Spread (Level 2)	$5 Width Vertical Spread (Level 2)
Market Action	Buy 100 Shares	Bull Call Spread ($200/$210)	Bull Call Spread ($200/$205)
Capital Required	$20,000 (100% Lock-up)	~$400 - $600 (Estimated)	~$200 - $300 (Estimated)
Capital Efficiency	**1.0x (Baseline)**	**~33x - 50x More Efficient**	**~66x - 100x More Efficient**
Max Risk (The Shield)	$20,000 (Full downside)	Defined: Limited to Debit Paid - Credit Received	Defined: Limited to Debit Paid - Credit Received
Max Reward (The Scale)	Unlimited	Capped at $1,000 minus cost	Capped at $500 minus cost
Diversification Benefits	Passive; cash is trapped.	Scales exposure; keeps $19.4k for other investment	Max scaling; keeps $19.7k for other investments

Dividend Stocks vs Optionable Stocks

Metric	Dividend Stocks (US Market)	Optionable Stocks (for Credit Spreads)
Trading Opportunities	~4,500+ securities pay some dividend.	~3,500+ stocks and ETFs have listed options.
"Golden" Opportunity	~60 "Dividend Kings" (50+ years of growth).	~500+ "High Liquidity" tickers (tight spreads).
Monthly Opportunity	Rare. Only ~80-100 stocks pay monthly.	Infinite. You can sell spreads every single week.
Payment Frequency	Usually Quarterly (some monthly REITs).	Weekly, Monthly, or 45-day cycles.
Market Condition	Only profit if stock goes UP or stays flat.	Profit if stock goes UP, FLAT, or slightly DOWN.
Growth Potential	Capped by company's earnings.	Scalable via leverage/collateral efficiency.
Effort Required	Low (Buy and hold).	Low/moderate (Requires active monitoring/rolls).
Capital Required	High (for meaningful cash flow)	Lower (Leverage allows higher "yield")
Risk Profile	Market price drops; dividend cuts.	Defined risk
Tax Impact (SG)	30% withheld at source by US.	0% Tax (usually treated as capital gains).

Move

Mag7 Spread Width Example

Assumption	30-45 DTE at 20 delta

Symbol	Current Stock Price	Strike Price	Width	Capital Required	Credit
NFLX	$88	$78/$79	$1	$100	$31.00
NVDA	$186.23	$165/$170	$5	$500	$109.00
AMZN	$239.12	$215/$220	$5	$500	$105.00
AAPL	$255.53	$235/$240	$5	$500	$87.00
GOOG	$330.34	$300/$305	$5	$500	$105.00
TSLA	$437.50	$390/$395	$5	$500	$115.00
MSFT	$459.86	$420/$425	$5	$500	$95.00
META	$620.25	$560/$565	$5	$500	$108.00
				TOTAL Capital	**Total Credit**
				$3,600	$755.00
					ROI
					21%

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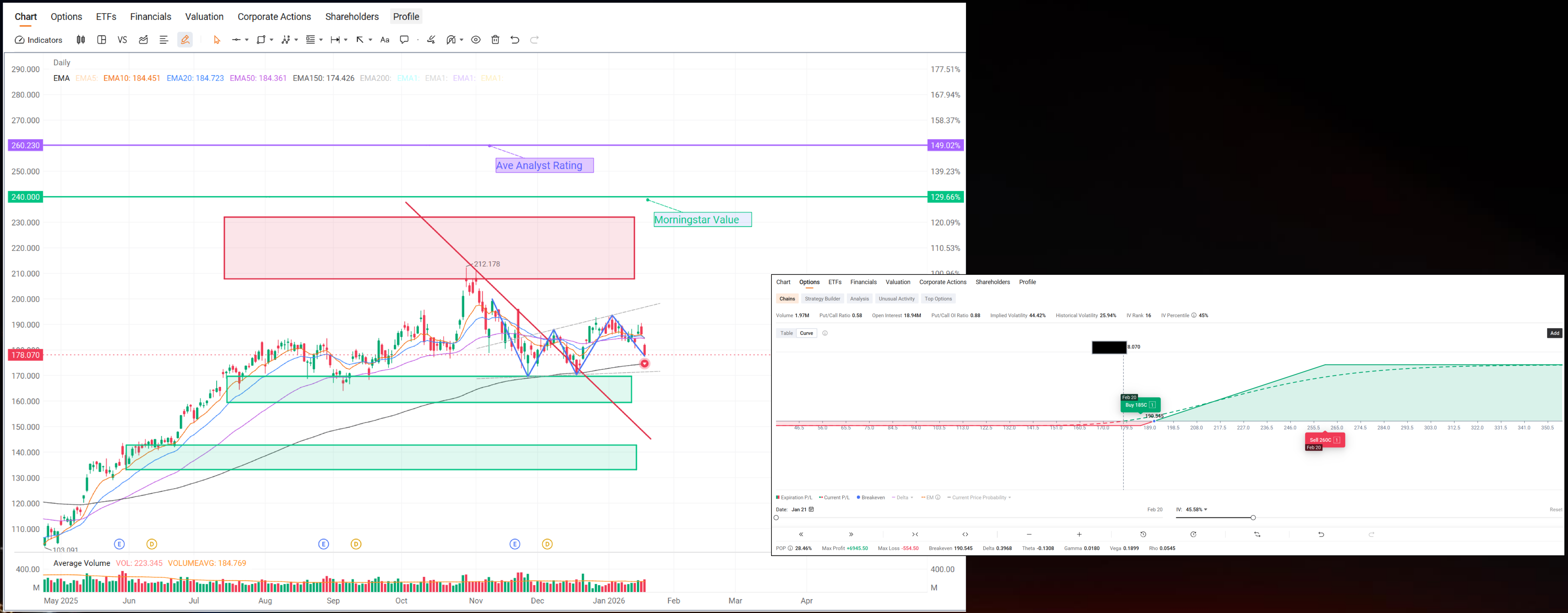
(2) 'Intrinsic Value' Hunter

Moomoo App/Desktop: Pair 3-in-1 Toolkit with Analyst Ratings/Morningstar Research

Scenario	Market Context	Analyst/Morningstar Data	Market View	Potential Option Spread Strategy
Undervalued (Bullish)	Stock is "on sale" but has a high-quality moat.	Fair Value > Actual Price	Deep Value / Recovery	Bull Put Spread (Credit)/ Long Call Spread (Debit)
Fairly Valued (Neutral)	Stock is at its "correct" price; move sideways.	Fair Value = Actual Price	Consolidation / Sideways	Iron Condor (Credit)
Overvalued (Bearish)	Stock is "expensive" or over-extended.	Fair Value < Actual Price	Overextended / Pullback	Bear Call Spread (Credit)
Growth Breakout (Strong Bull)	Analysts are raising targets rapidly.	Actual Price > Recent Fair Value	Breakout	Bull Call Spread (Debit)

Example: Below Fair Value = Long Call Spread?



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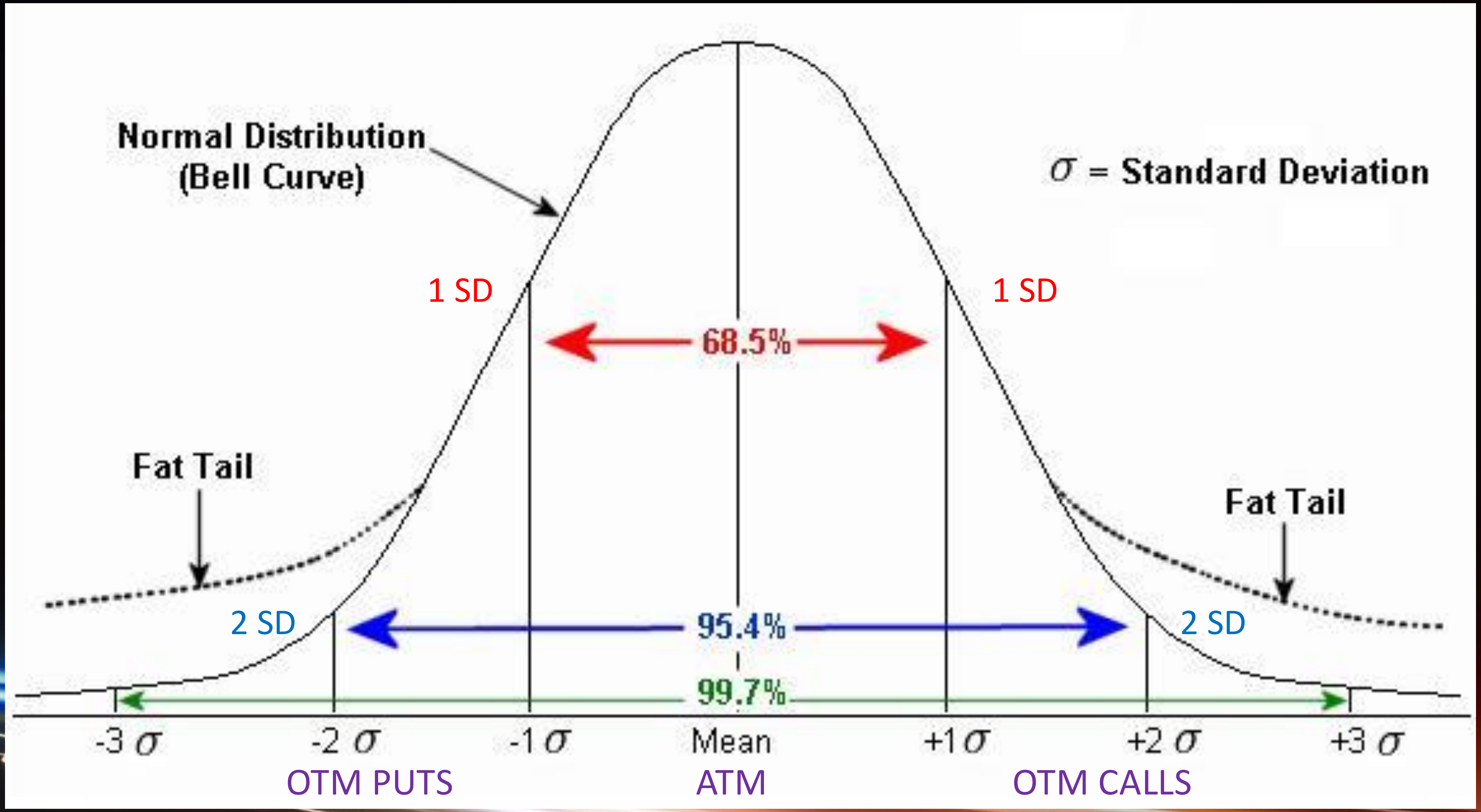
(3) 'Earnings Move' Catcher

Moomoo Desktop: Pair 3-in-1 Toolkit with Historical Earnings Move + Earnings Analysis



Earnings Season with moomoo

Invest Smarter!

Pre Earnings

- Financial Estimates
- Earnings Calendar
- Unusual Options Activity
- Options Analysis
- 0DTE Options
- Options Strategies

During Earnings

Earnings Conference Call

Post Earnings

- Earnings Hub
- Advanced Options Orders
- Moomoo Insights
- Advanced Orders
- Moomoo AI
- Analyst Ratings
- Visualized Financials

Open Moomoo App > Search Bar > Search for "Earnings Hub"

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(3) 'Earnings Move' Catcher

Moomoo Desktop: Pair 3-in-1 Toolkit with Historical Earnings Move + Earnings Analysis

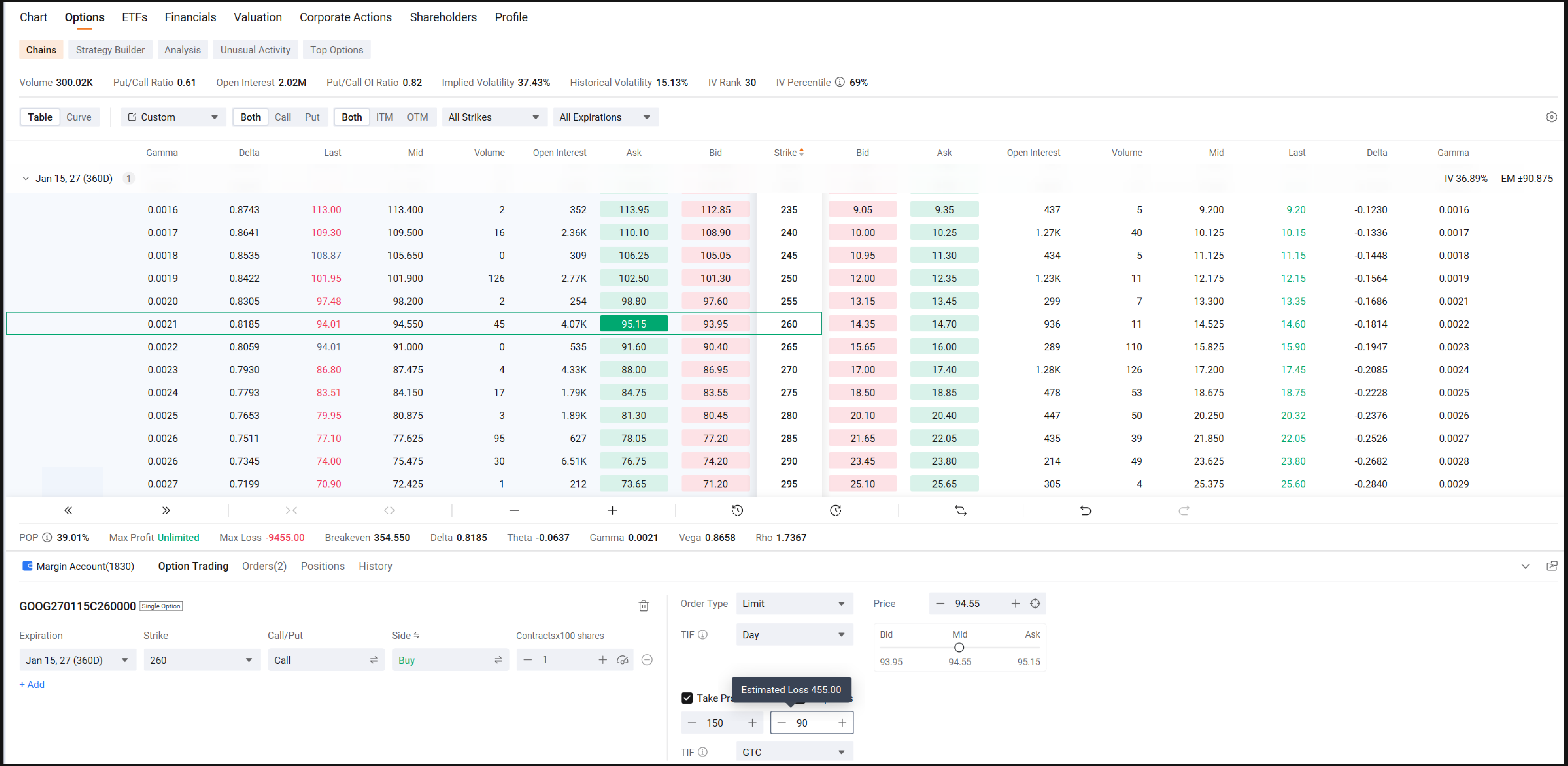
Earnings Phase	Price Reaction vs. Expected Move (EM)	Additional Volatility (IV) Context	Potential Option Spreads
Pre-Earnings (The Run-up)	Stock drifting higher or lower within 1 SD	IV Rising: Fear/Anticipation is building.	Bull Spread or Bear Spread (Option Buyer)
Earnings Day (The Announcement)	1 SD Move: Stock moves within the 'Expected Move' range	IV Peak: Premium is at its most expensive.	Iron Condor or Option Spread (Option Seller)
Earnings Day (Surprise)	2 SD+ Move: Stock "Gaps" far beyond the 'Expected Move' range	Extreme Move: Unexpected news (Black Swan).	Legging in / Rolling (Management)
Post-Earnings (The Drift)	Stock stabilizes or "Mean Reverts" back toward 1 SD.	IV Crush: Fear has exited the market.	Bull Spread or Bear Spread (Option Seller)
Post-Earnings (New Trend)	Stock stays at the new level (Breakout) outside 2 SD.	IV Low: Volatility has normalized.	Bull Spread or Bear Spread (Option Buyer/Seller)

Agenda

01. The Landlord vs Developer Analogy
02. 'Options Spread' Strategy Construction
03. 3 Ways to Scale with Option Spreads
04. Tips to Shield: Legging-in & Rolling
05. Moomoo AI Prompt Tips

(1) Option Buyer: Legging in

Old Way - Bracket Order



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New Way - Legged in as a 'Spread' (Same Expiration)

Image provided are not current and any securities are shown for illustrative purposes only and is not a recommendation.

New Way - Legged in as a 'Spread' (Different Expiration)

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BEFORE: Buy Call (LEAP)
Capital Requirement: $9455

AFTER (LEGGING IN): BULL CALL SPREAD / DIAGONAL SPREAD
Capital Requirement: $6758 - $7645

(2) Option Seller: Rolling

Moomoo App: Buy Time to be Right or Protect your Profit

Rolling Definition:
Closing an Option Position and Opening a Different Option Position at the SAME time

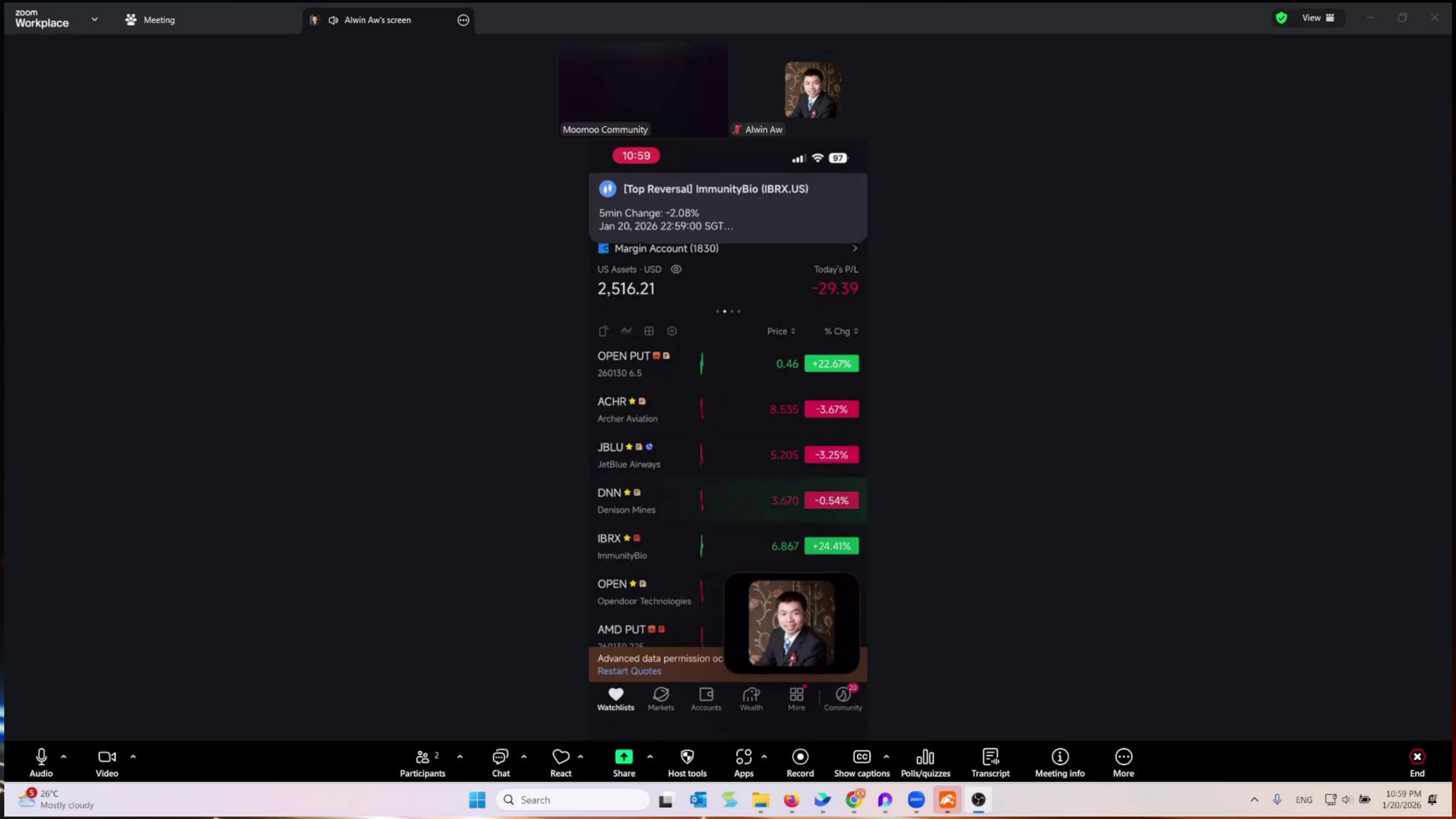
Why Roll?
1) Avoid assignment risk
2) Buy time to be right
3) Sometimes turn loser into winner (require margin)

(2) Option Seller: Rolling

Moomoo App: Buy Time to be Right or Protect your Profit

Scenario	Market Condition	Action (The "Roll")	Goal / Logic
Rolling Out (Time)	Price within 1 SD, but close to expiration.	Close current option; open new one with a later expiration date at the same strike.	Buy more time. You keep the position alive to let Theta (time decay) work or wait for a price reversal.
Rolling Down (Credit Spread)	Price testing your Short Put strike (near ATM/heading ITM)	Close current spread; open a new spread at a lower strike price (further OTM).	Defensive Shield. You move your "Safety Line" further away from the current price to avoid assignment risk
Rolling for a Credit	Volatility (IV) rises, premium increased.	Close the position and open a new one further out in time for a higher premium than the cost to close.	Income Optimization. You effectively get paid a "bonus" to wait longer for the stock to recover.
Rolling Up (Winning Trade)	The stock has moved significantly in your favor (ie. beyond the 1 SD upper bound, or >60% credit received).	Close current spread; open a new one closer to the current price.	Aggressive Scaling. You "lock in" some profits from the first trade and setup a new profit target as second trade

How to Roll out a Spread using Moomoo App



Agenda

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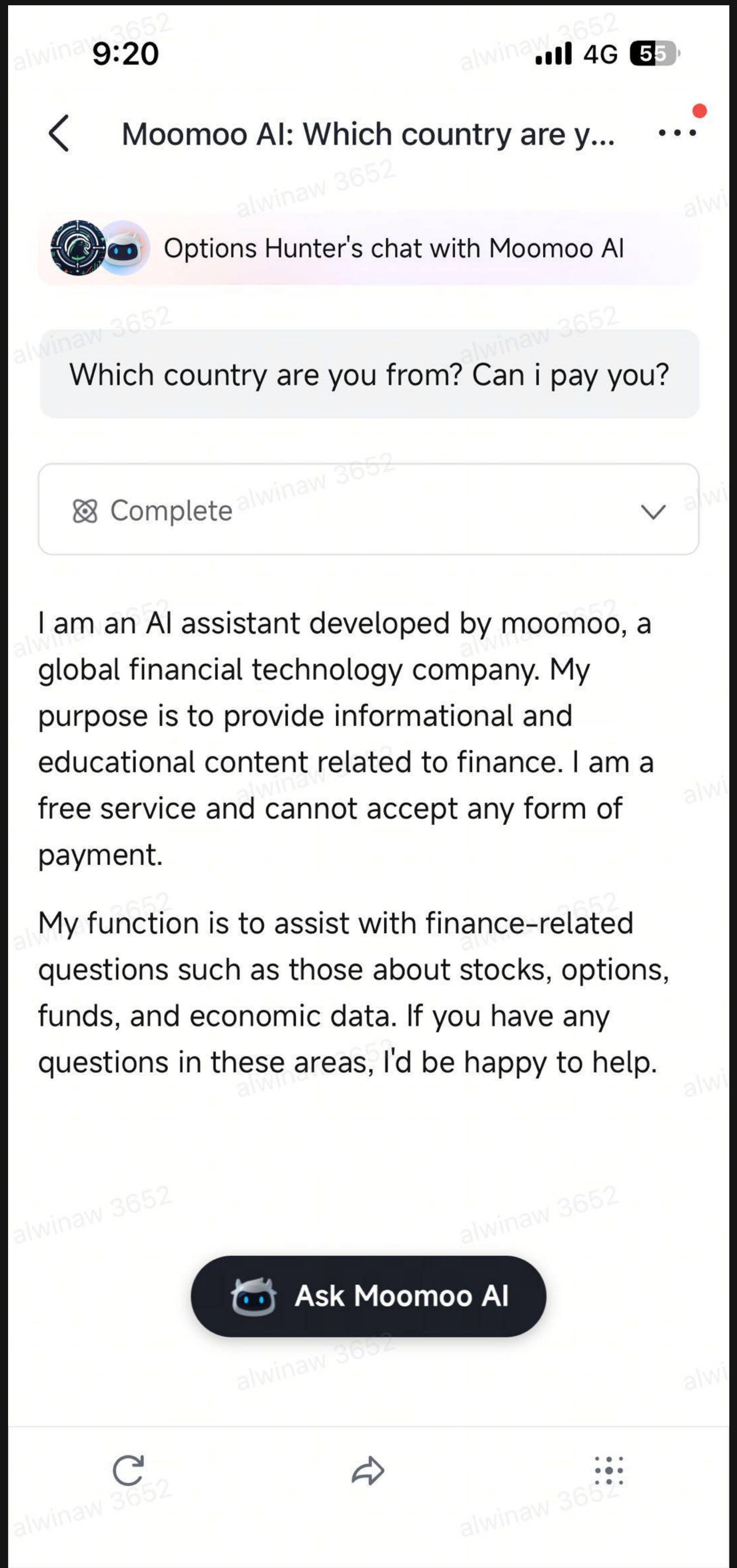
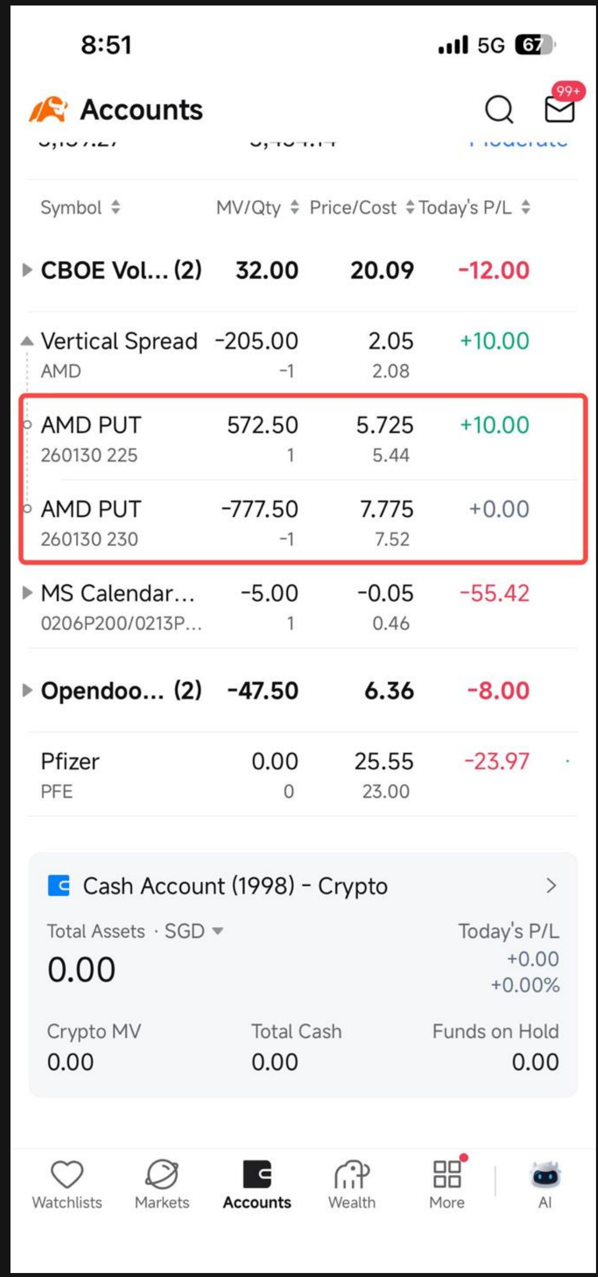
04. Tips to Shield: Legging-in & Rolling
05. **Moomoo AI Prompt Tips**

Moomoo AI

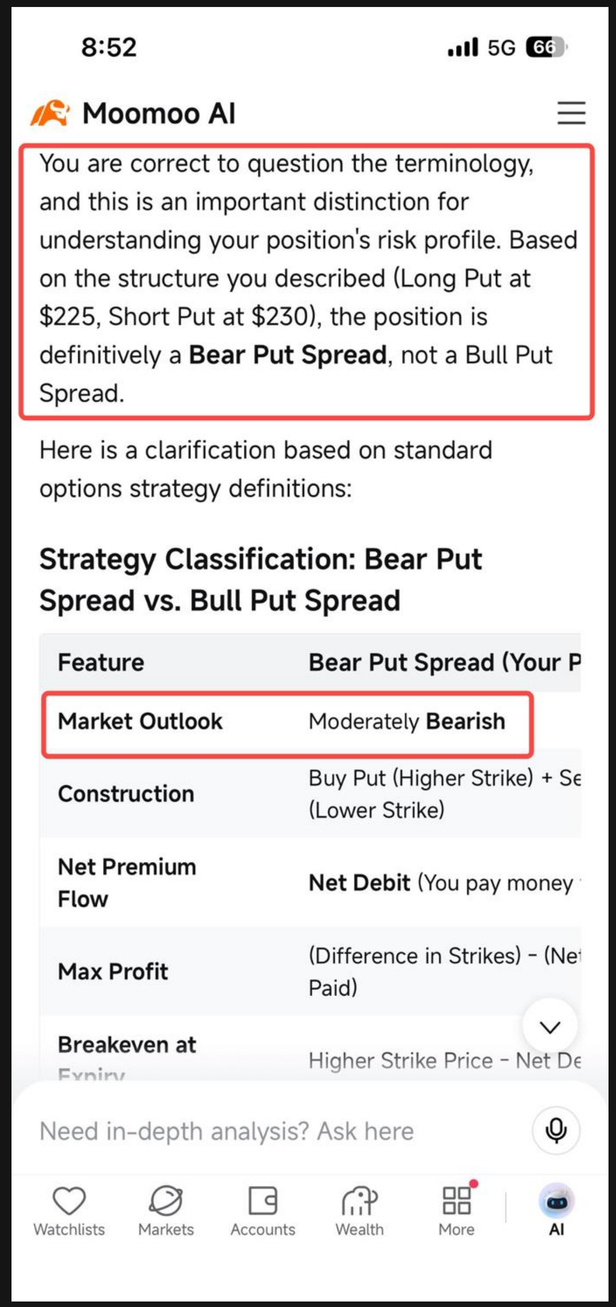
Moomoo Desktop/App: 24/7 Trading Co-pil



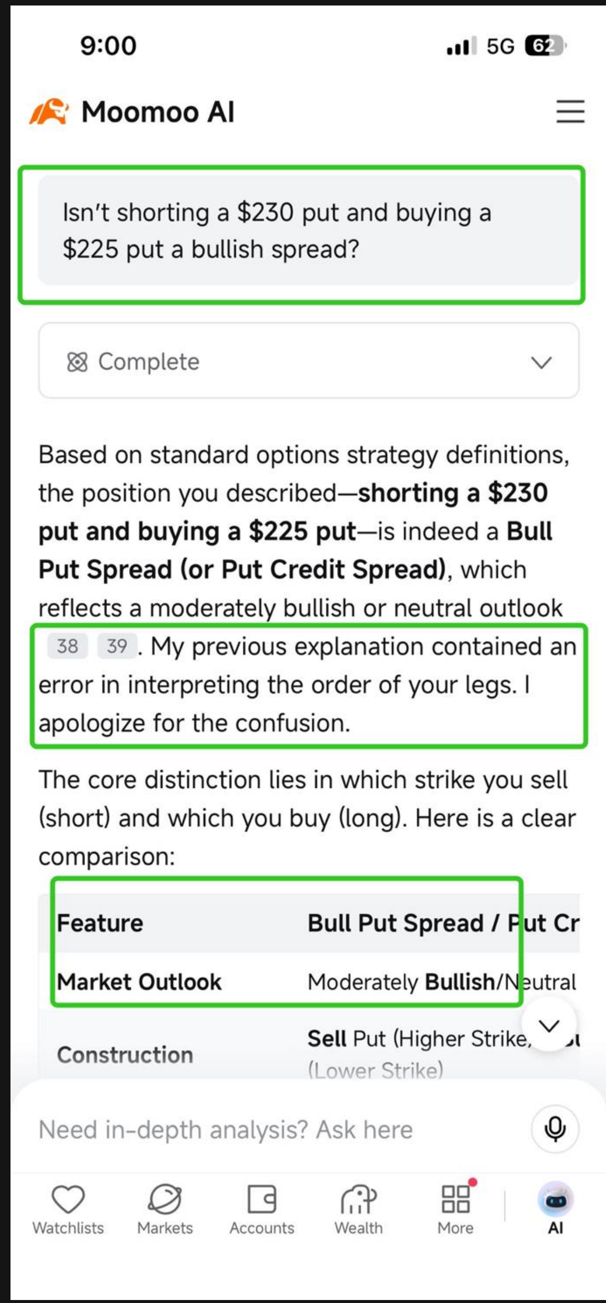
1) FREE service (everyone love this)
2) Multilingual: English, Chinese, Malay
3) Input: Typing/Voice
4) Shareable response link: https://chat-ai-share.moomoo.com/share?inviter=e0239cfab1ce5d5612ceb47cbf364b5b6d35c298cea8e9642bcf7e8dabd42e7560bd2f1ae8&chatId=ca5a79b529035b7358e3d1cfbdb23548daa57aeee7c9addf1399e511b25c51626c6efd
5) Train-able - ie. existing 'Strike Prices: Long Put at $225, Short Put at $230'



Current Option Spread



Wrong AI Response



Corrected AI Response

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Moomoo AI

What It Can or Cannot Do?

Query: As moomoo ai, what are the best practices to prompt you? What can you do vs what you cannot do to help me make money in the stock or options market?

(a) Analyze Request

Understanding request
Identifying data
Gather Key Data

- Query real-time quotes
- Query financial/options data
- Query historical trends
- Query technical indicators
- Query analyst ratings
- News retrieval:
- Community discussion retrieval:

trends/insights/earnings expectations/stock price predictions

(b) **Can**

- Give general educational content and explain financial concepts with "trained" accuracy
- Educate about a ticker with reliable sources of factual market/stock/funds/economic data
- Compare 2 strategies with general methodology for different tickers
- Analyse/Explain - fundamental, technical, sentiment, options, risks and portfolio
- Review position/portfolio/order history (informational purpose) - ie Evaluate if my current AMD option position is safe or need to adjust?
- Deep dive on some data - ie. Technical - Estimate potential price ranges (using IV, 14D high to low stock price ranges, options flow for support-resistance)

(c) Cannot

- Access some feature focus data (ie live Strategy Builder/Earnings Analysis) to provide numerical analysis
- Access real-time market data, broker-specific margin calculators
- Access your personal account information or trading history

Best Practices for Prompting moomoo AI

To get the most relevant and useful information, consider these tips:

- **Be Specific:** Clearly state your query, including relevant stock codes (e.g., `AAPL.US` , `00700.HK`), timeframes, or specific metrics you're interested in.
- **Provide Context:** Mention if you're looking for fundamental analysis, recent news, technical patterns, or sector comparisons.
- **Use Clear Formats:** For data comparisons, listing stocks or metrics in your question can help structure the answer.

Example Prompts:

- "Can you explain the recent earnings report for `NVDA.US` and how analysts have reacted?"
- "What are the key differences between the `SPY.US` and `QQQ.US` ETFs?"
- "Show me the historical dividend yield and payout ratio for `JNJ.US` over the past five years."

Moomoo AI

General Prompt (By Keywords Category)

Fundamental Analysis	Technical Analysis	Sentiment Analysis	Options Analysis
financial performance	price action & trend	market sentiment/bias	Expected Move
financial growth	key level (support & resistance)	valuation concerns	implied volatility (IV), IVRank
valuation metrics	momentum indicators (eg. RSI, MACD, MA)	sector leadership	market sentiment (put/call ratio)
profitability	volume	technical sentiments (overbought/sold signals)	unusual options activity
cashflow		institutional confidence	option spread review (eg. strike prices, expiration, long/short legs)
business risks to monitor		money flow	greeks like delta/theta
analyst sentiment		short interest	options volume
			options open interest

Detailed Prompt (By Options Scenario)

Options Scenario	MoomooAI Detailed Prompt (Examples)
New Positions	Single Options Analysis: 'What option strategies I can use for QQQ 260930 650 C'
Active Positions	"Analyse my options positions", ' What risks my current options portfolio is exposed to?'
Execution	"Compare the margin requirement for a naked Put vs a $5 wide Vertical Spread on [Ticker]."
Adjustment	"My [Ticker] spread is down 20%. Based on the current technical chart, is it better to Roll for a credit or Fold?"

3-Steps Action Plan

Step 1: Moomoo AI

(a) New Moomoo User? No positions?
Experiment with fundamental/technical/sentiment/options analysis
AI Prompt Tips: Do a fundamental & technical analysis on your favourite <ticker>

(b) Existing Moomoo User? Have stocks/ETFs/options positions?
AI Prompt Tips:
1) Analyse my portfolio
2) How can I hedge my portfolio risk with options?

Step 2: Moomoo Desktop/App

4-in-1 Options Toolkit:
1) Seller Dashboard
2) Strategy Builder
3) Option Curve
4) Expected Move

+ P.R.O.F.I.T.S features
(ie. Analyst rating/Morningstar)

Step 3: Trade Options

(a) No options positions?
Objective to open 'option spread':
1) Capital Efficiency/Leverage
2) Income
3) Protection (ie. Options Spread)

AI Prompt Tips:
Analyse how I can add options to my existing stocks holding in a safe way for <objective>?

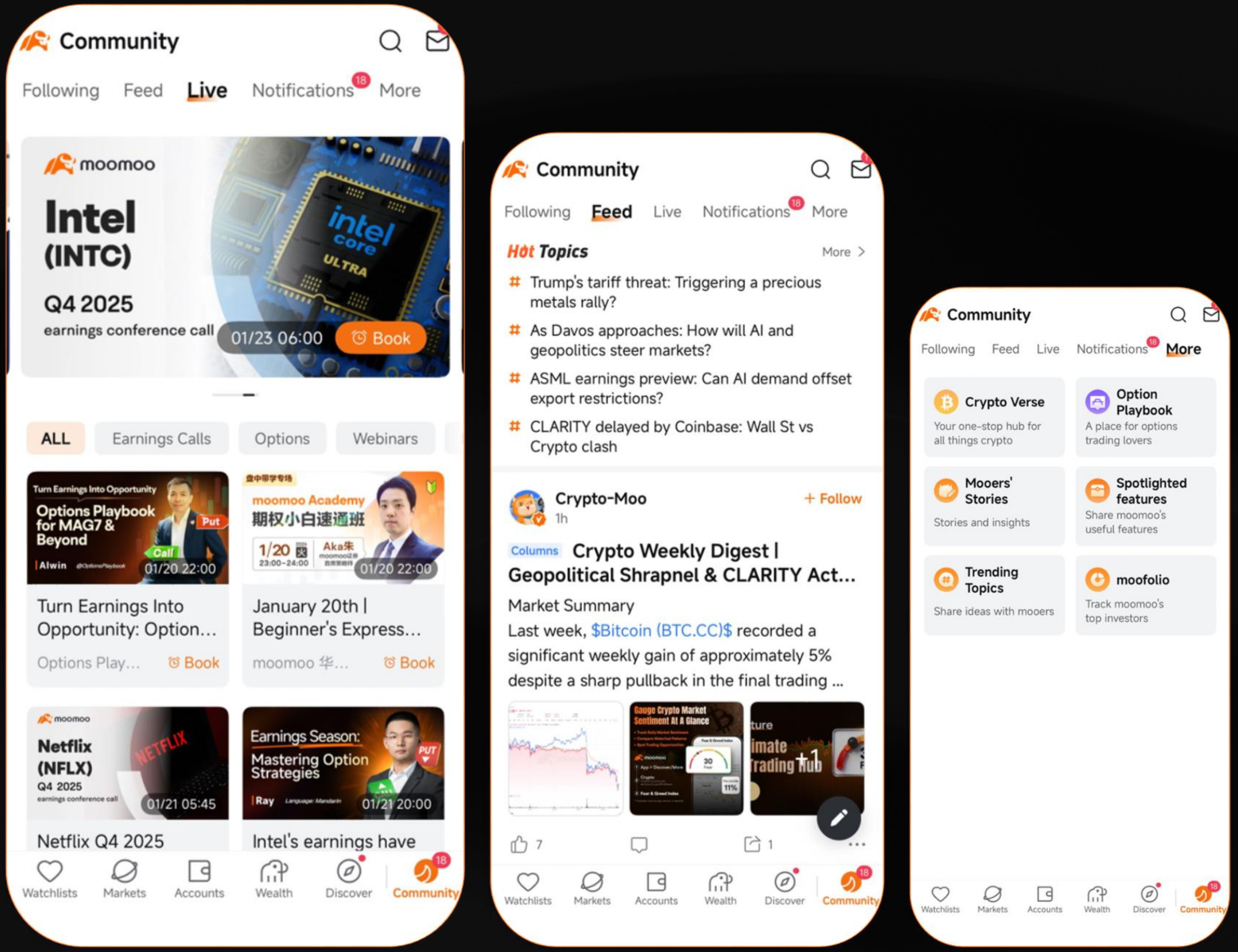
(b) Have options positions?
Hold/Roll/Fold existing option positions:

AI Prompt Tips:
Analyse if my options positions are safe or need to adjust?

Moomoo Community

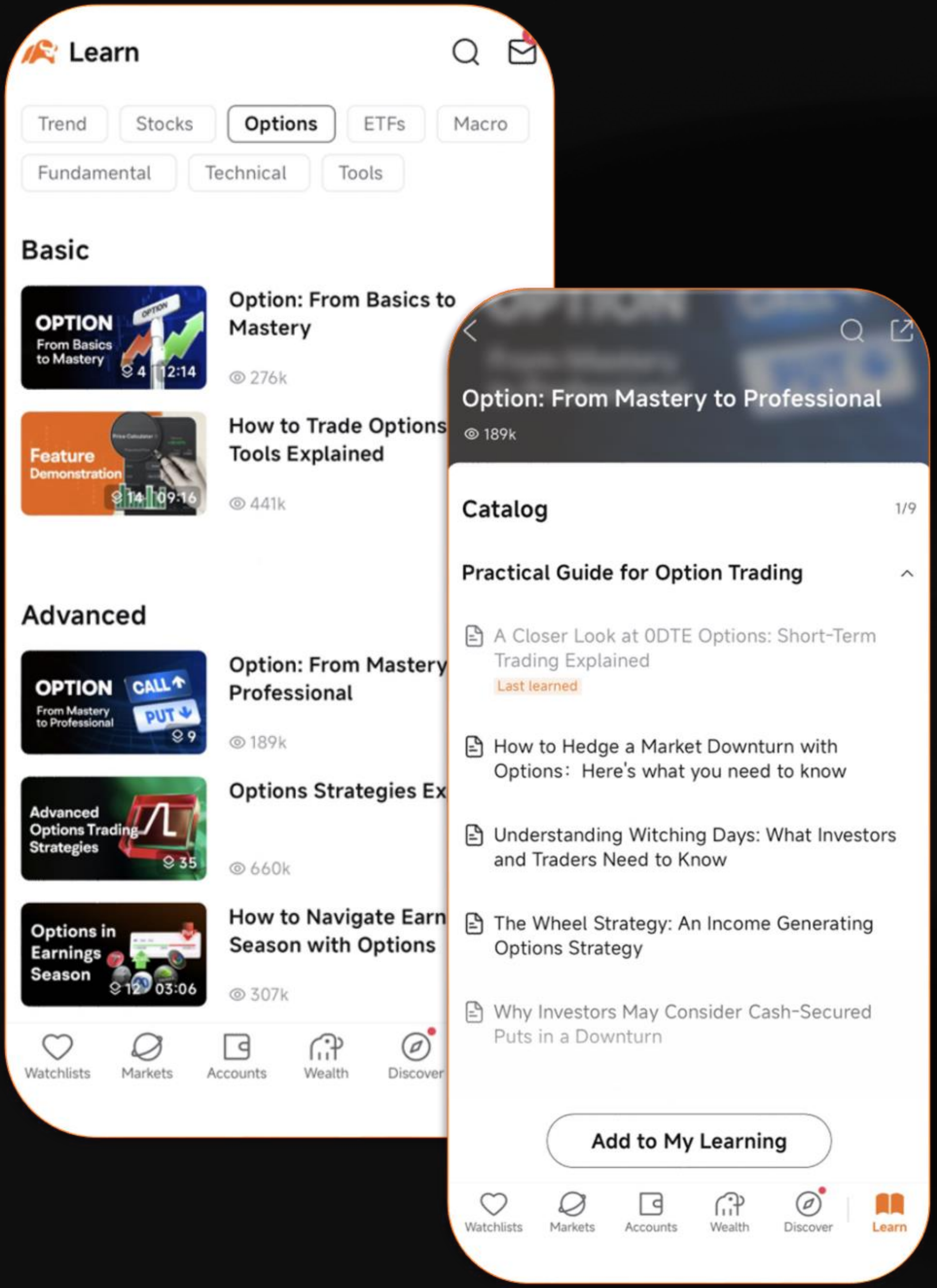
28 million minds are better than one

We go further together. Join our 28M+ global community, filled with investors and financial leaders who share and learn from each other.



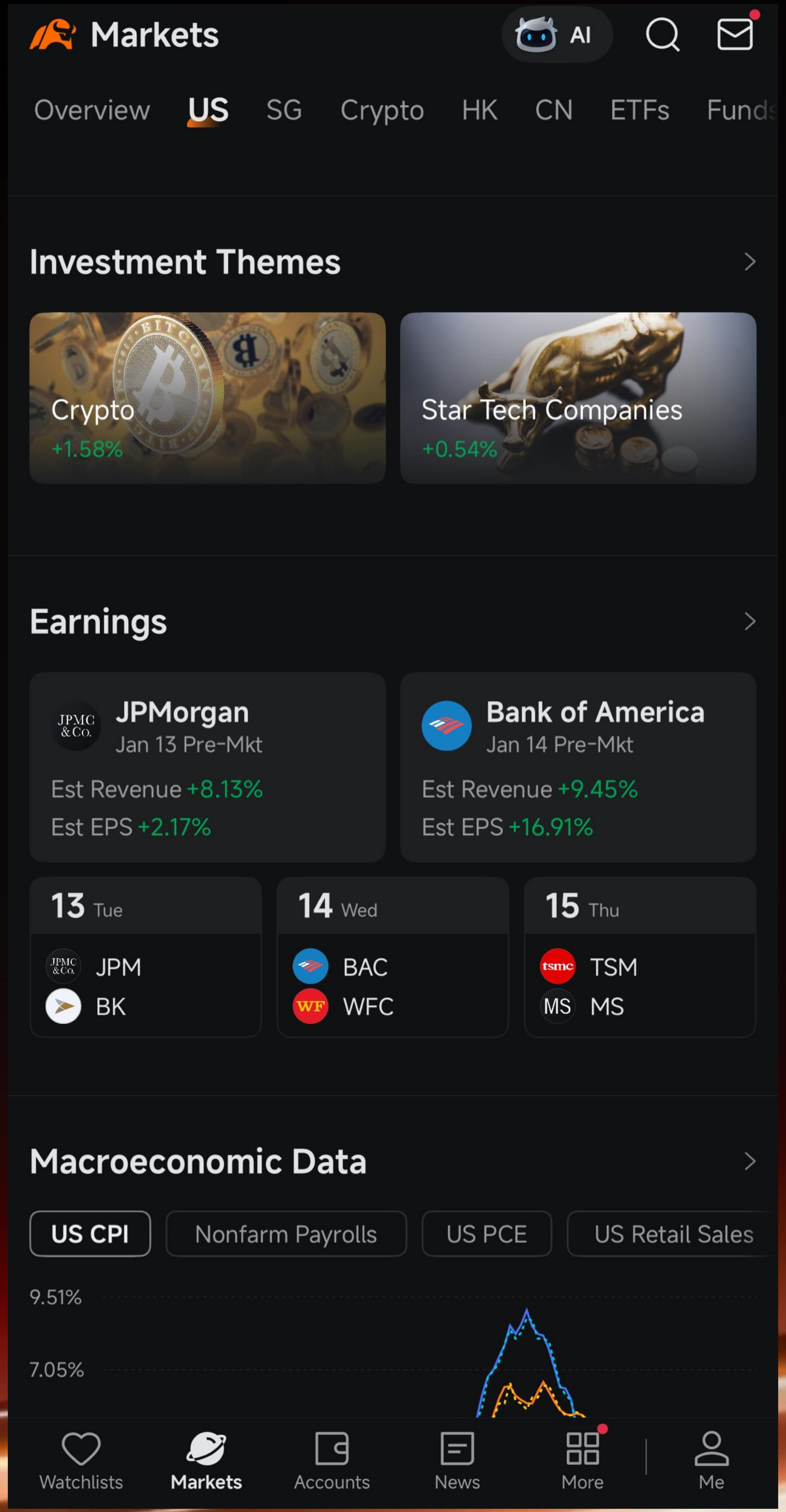
Moomoo Learn

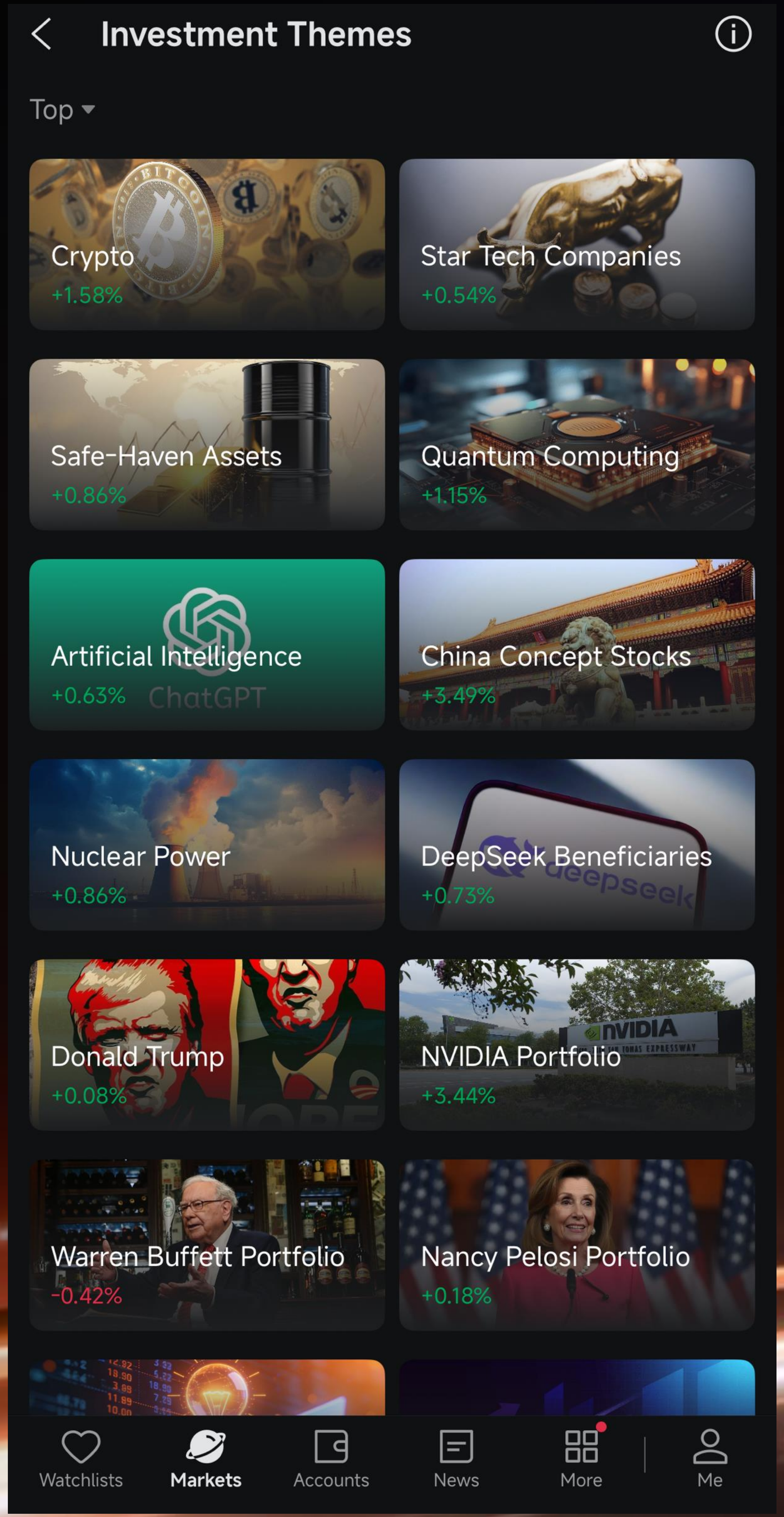
Unleash the power of possibilities: Trade options, Expand your horizons.

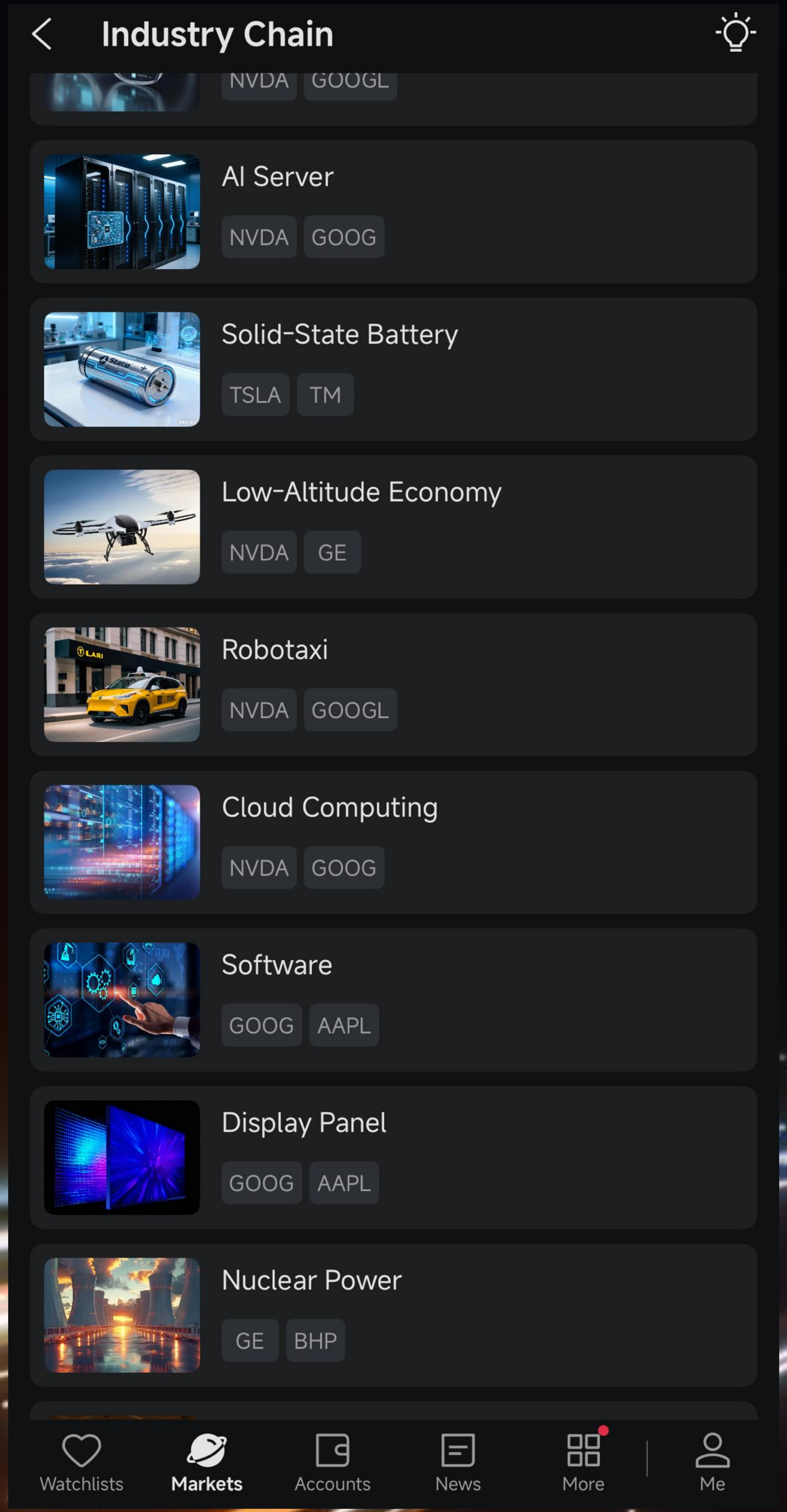


Navigating the Chop

Maximise Our Moomoo App







Exclusive Perks For Option Traders

Resources help you to start your option trading

Scan the QR code to check for Bootcamp page