



Daily Risk Check Template

Estimated Time: 5 Minutes

Goal: Improve consistency, reduce emotional mistakes, and protect capital before the market opens.



Step 1: Portfolio Exposure Review (1 Minute)

- ☐ Am I overly concentrated in one **sector**, **stock**, or **strategy**?
 - ☐ Are any positions **correlated** and exposed to the same risk?
 - ☐ What percentage of my portfolio is currently at risk?
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Step 2: Max Loss Check (1 Minute)

- ☐ What is my **maximum capital at risk** today?
 - ☐ Does this exceed my **daily risk tolerance or loss limit**?
 - ☐ Am I fully aware of max loss based on the strategy (e.g. long option, spread, sell naked)?
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Step 3: News & Volatility Scan (1 Minute)

- ☐ Any key **economic reports**, **earnings**, **Fed decisions**, or geopolitical news?
 - ☐ What's the current **VIX** level (volatility sentiment)?
 - ☐ Any price-sensitive headlines affecting my trades?
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Step 4: Position Sizing Sanity Check (1 Minute)

- ☐ Are positions sized at or under **1–2%** of total capital?
 - ☐ Am I scaling up responsibly (with high-confidence setups)?
 - ☐ Do I meet **margin requirements**, if applicable?
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Step 5: Exit Plan Confirmation (1 Minute)

- ☐ Do I have a clear **stop-loss** and **take-profit** for each position?
- ☐ Have I mentally accepted my risk and profit limits?
- ☐ Am I prepared to act without emotion?