U.S. Stock Trading Guide 2.0

From Spot, Options & Perps to
Risk Management and Practical Strategies

Bitget Research

Contents

Introduction

The line between crypto and traditional finance is fading.

With stock tokens and stock perps, assets like U.S. stocks are no longer limited to Wall Street trading hours. Traders can now access the world's leading companies—and navigate price movements and thematic trends—through a single crypto account, using USDT and the familiar mechanics of crypto markets.

This is the experience Bitget has built into its Universal Exchange (UEX): by bringing together crypto and global assets, it unifies opportunities that were once scattered across different systems under a single trading logic.

That's why we created Your Guide to U.S. Stock Trading on Bitget—to help traders at every stage systematically learn how to trade spot stocks, stock perps, and stock options on Bitget. You'll learn the trading process, risk control methods, and practical approaches needed not just to participate, but to identify opportunities amid market volatility.

UNIT

01

Understanding Bitget stock products

1.1

What are spot stocks?

Definition

Spot stocks are Bitget's tokenized U.S. stock products (rToken), issued by the Reality platform and backed 1:1 by real underlying assets, with strategic backing from Bitget. Each stock token represents a real underlying U.S. stock. Users can buy and sell directly with USDT—without opening an overseas brokerage account or converting currencies—while enjoying a trading experience that closely mirrors traditional U.S. stock prices.

Liquidity and shareholder benefits

- **Liquidity:** Full NYSE and Nasdaq liquidity, giving users the same market depth as traditional U.S. stocks. Orders are executed in milliseconds with industry-leading low slippage.
- **Shareholder benefits:**

Automatic stock dividends
Stock dividends are distributed to your account as tokens on a 1:1 basis, and your cost basis is updated automatically.

Automatic cash dividend settlement
Cash dividends are automatically converted to USDT and credited to your account, with the time and amount clearly displayed.

Automatic stock split handling
On-chain tokens are adjusted automatically to keep your holdings fully aligned with the underlying U.S. stocks.

Multi-asset margin support
Stock tokens can be used as multi-asset margin across the Bitget ecosystem, including spot, futures, grid bots, copy trading, and Earn.

Trading hours

Bitget spot stocks support 24/7 trading, extending far beyond the trading hours of traditional U.S. stock markets.

- **Core liquidity window:** Liquidity is deepest during regular U.S. market hours (9:30 AM–4:00 PM ET).
- **Other sessions:** Trading is also available during pre-market, after-hours, and overnight sessions, although liquidity may be lower.

Available stock tokens on Bitget

Bitget currently supports more than 500 stock tokens, covering dozens of trending sectors from tech and AI to energy and pharma, with new listings added continuously, including:

CATEGORY	STOCK TOKENS
Tech giants	rAAPL, rTSLA, rMSFT, rGOOGL, rNVDA, rMETA, rAMZN, etc.
AI software, cloud & SaaS	rIBM, rDOCU, rWDAY, rTEAM, rDOCN, rMNDY, rHPE, etc.
Cybersecurity	rFTNT, rOKTA, etc.
Semiconductors & AI hardware	rUMC, rSTM, rTER, rHIMX, rCGNX, rSOXL, rSOXS, etc.
Data storage	rMU, rSTX, rWDC, rSNDK, etc.
Optical communications	rLITE, rCIEN, rCOHR, rMRVL, rCSCO, rANET, etc.
Solar, storage & lithium batteries	rENPH, rSEDG, rALB, rTAN, rLIT, rICLN, etc.
Nuclear energy & uranium mining	rURA, rUEC, rDNN, rBWXT, etc.
Copper, rare earths & resources	rFCX, rSCCO, rCOPX, rREMX, rSLV, etc.
Crude oil & natural gas	rBNO, rUNG, etc.
Aerospace, satellites & defense	rNASA, rBKSY, rLMT, rBWXT, rRKLB, rSPCX, rDXYZ, etc.
Pharma, biotech & gene editing	rJNJ, rUNH, rABBV, rCRSP, rLABU, rLABD, etc.
Crypto-related	rMSTR, rHOOD, rCRCL, rMARA, etc.
Banking, finance, payments & crypto	rGS, rC, rWFC, rSCHW, rCOF, rAXP, rPYPL, rBMNR, rCRCA, etc.
Consumer staples	rKO, rPEP, rMCD, etc.
Consumer brands, dining & energy drinks	rCELH, rCAVA, etc.
Media, streaming & advertising	rDIS, rROKU, rSONY, rTTD, etc.
China-related assets	rBZ, rYINN, rYANG, etc.
U.S. indices & short-term instruments	rQQQ, rSPY, rIWM, rUPRO, rSPXU, rTNA, rTZA, etc.

1.2

What is Stock+?

Definition

Bitget Stock+ is a U.S. stock trading service offered by Bitget. In partnership with U.S.-licensed brokers RQD Clearing and Atomic Vaults Securities, orders are routed to Nasdaq, the NYSE, and regulated market makers for execution, providing access to deep market liquidity. Users can trade more than 10,000 U.S.-listed stocks and ETFs directly through the Bitget app and enjoy full shareholder rights, including cash dividends, stock dividends, and voting rights.

Key advantages at a glance

Full broker-grade experience:

  - **User-friendly interface:** A broker-style interface designed to match leading traditional platforms, making it easy to get started.
  - **Stock transfer support:** Transfer stocks from other brokers to Bitget.
  - **24/5 trading:** Trade U.S. stocks during pre-market, regular market, after-hours, and overnight sessions.
  - **Free real-time market data:** Receive complimentary Level 1 real-time quotes upon account opening. Eligible VIP users can also enjoy free access to Nasdaq TotalView Level 2 and other millisecond-level market data, saving $248 per year.
  - **Fractional shares:** Start investing from as little as 0.0001 shares and build a diversified portfolio with greater flexibility.
  - **Market insights:** Access real-time news, earnings reports, and analysis on popular stocks to support your investment decisions.

- **Convenient deposits and withdrawals:** Deposit and withdraw both fiat and crypto assets within a single app. Funds can be withdrawn immediately after T+1 settlement.
- **Low fees:** Transaction fees start at 0.1%, with discounts of up to 50% during the promotion period.

What is the difference between Stock+ and spot stocks?

The key difference lies in the underlying assets and ownership rights. With Bitget Stock+, users hold real U.S. stocks in custody with a regulated broker and enjoy full shareholder rights, including cash dividends, stock dividends, and voting rights. Spot stocks, or rTokens, are on-chain tokens that track the prices of U.S. stocks and represent tokenized beneficial interests. Each rToken is backed 1:1 by the corresponding stock held in custody by a licensed broker.

1.3

What are stock options?

Definition

Options are financial derivative contracts that give the buyer the right—but not the obligation—to buy or sell an underlying asset (such as a stock or ETF) at a predetermined price (the strike price) on or before a specified date (the expiration date). In exchange for receiving the premium, the option seller assumes the corresponding obligation. If the buyer chooses to exercise the option, the seller must fulfill the contract.

EXAMPLE

Suppose you believe a stock will rise significantly next month, but you're not completely certain and don't want to buy the shares outright. Instead, you pay $50 for an option contract that gives you the right to purchase the stock at $200 anytime within the next 30 days.

- If the stock rises to $500: You exercise the option, buy at $200, sell at $500, for a gross profit of $300. After the $50 premium, your net profit is $250.
- If the stock falls: You simply let the option expire. Your maximum loss is limited to the $50 premium paid.

In simple terms, an option lets you pay a small amount for the opportunity to participate if the market moves in your favor, while limiting your downside to the premium paid if it doesn't.

Key components of stock options

KEY COMPONENT	DESCRIPTION
Underlying asset	The asset on which the option is based, typically a stock, ETF, or index (such as the S&P 500 or Nasdaq 100). A standard option contract generally represents 100 shares.
Strike price	The agreed-upon price in the contract at which the underlying asset can be bought or sold.
Expiration date	The last day the option remains valid. After this date, the contract expires automatically.
Premium	The price paid by the buyer to purchase the option, fluctuating daily based on the asset's price, volatility, and time remaining until expiration.
Type	Options can be classified by the rights they confer, exercise timing, underlying asset, and strike-to-market relationship. At launch, Bitget supports call and put options.

Call options vs. put options

Long call

The buyer has the right to buy the underlying asset at the strike price—best suited when you expect the stock to rise. It provides leveraged exposure. If the price rises, the option's value typically increases; if it falls, your loss is capped at the premium.

Long put

The buyer has the right to sell the underlying asset at the strike price before expiration—generally used when you expect the price to decline or want to hedge existing holdings.

Why trade options?

- **Leverage:** Control a larger number of shares with a smaller amount of capital, amplifying potential returns.
- **Flexible strategies:** Use options for speculation, hedging, or income generation.
- **Limited risk (for buyers):** The maximum loss when buying options is capped at the premium paid—unlike short selling, which carries unlimited risk.
- **Diversified allocation:** Manage your portfolio more flexibly across different market conditions.

1.4

What are stock perps (perpetual/delivery futures)?

Definition

Bitget stock perps are USDT-margined perpetual futures based on tokenized U.S. equity indices. They enable synthetic exposure to U.S. stock performance by tracking a composite index that aggregates prices from leading tokenized stocks. In short, Bitget stock perps are a novel bridge between crypto and traditional finance, blending Real-World Assets (RWA) with perpetual futures to give crypto users zero-barrier access to the growth of top global companies—such as Apple and Tesla—using familiar crypto perpetual futures mechanics.

Bitget stock perps vs. traditional U.S. stocks vs. crypto futures

- **Trading hours:** 24/7 (Monday 12:00 AM–Saturday 12:00 AM, UTC-4)—far longer than traditional stock-market sessions, though with brief weekly breaks compared to 24/7 crypto futures.
- **Asset form:** Synthetic futures based on tokenized indices, not direct ownership of shares. No complex account setup, identity verification, or cross-border transfers needed.
- **Leverage and direction:** Support both long and short positions with leverage up to 25x, while traditional stock spot trading usually offers little or no leverage and short selling is often complex.

Available stock perps as of June 15, 2026

Since their launch in September 2025, Bitget stock perps have expanded rapidly and now include more than 150 U.S. stock-related perpetual futures, with new contracts added regularly.

CATEGORY	SYMBOLS
AI & semiconductors	NVDAUSDT (Nvidia), TSLAUSDT (Tesla), AMDUSDT (AMD), TSMUSDT (TSMC), AVGOUSDT (Broadcom), INTCUSDT (Intel), etc.
Data storage	MUUSDT (Micron), STXSTOCK (Seagate), WDCUSDT (Western Digital), SNDKUSDT (SanDisk), etc.
Optical communications	POETUSDT (POET Technologies), LITEUSDT (Lumentum), COHRUSDT (Coherent), etc.
Quantum computing	IONQUSDT (IonQ), INFQ (Infleqtion), RGTIUSDT (Rigetti Computing), QBTSUSDT (D-Wave Quantum), etc.
Space industry	SPCXUSDT (SpaceX), ASTSUSDT (AST SpaceMobile), RKLBUSDT (Rocket Lab), RDWUSDT (Redwire), etc.
Index-based perps	QQQUSDT (Nasdaq 100 index), SPYUSDT (S&P 500 ETF), IWMUSDT (Russell 2000 ETF), etc.

Trading mechanics and key parameters

Futures type	USDT-M perpetual futures (USDT-margined)
Leverage	1–25x (tiered by symbol; popular stocks up to 25x, certain indices 10–25x)
Margin mode	Isolated / Cross (Beginners are advised to use isolated margin for better risk control.)
Funding rate	Settled every 4 hours (same mechanism as standard crypto perpetual futures; long-term holders should monitor directional costs)
Trading hours	Monday 12:00 AM–Saturday 12:00 AM (UTC-4); paused during holidays and market closures
Minimum tick size	Typically 0.01 USDT
Liquidation	Triggered by mark price, with protection from the Bitget Protection Fund
Important note	Positions cannot be opened or closed during market closures; significant gap risk may occur at reopen, so hold positions over the weekend with caution

1.5

Why choose Bitget?

Bitget's stock offering outperforms traditional U.S. stock trading in several key ways:

- **All-day trading:** Aligned with the crypto market, trading is open Monday 12:00 AM to Saturday 12:00 AM (UTC-4)—far beyond traditional U.S. market hours, letting you position ahead of the regular open.
- **Go long or short:** Whether markets are rising or falling, you can profit either way through Bitget stock perps, with leverage on certain stocks reaching up to 100x.
- **Exclusive pre-IPO opportunities:** Gain access to sought-after opportunities in companies such as SpaceX and OpenAI.
- **All-in-one portfolio:** Invest in stocks, ETFs, crypto, forex, and gold from a single account, with access to Earn, loans, margin, and auto-invest.
- **Direct access to U.S. liquidity with shareholder benefits:** Spot stocks track underlying prices 1:1 via licensed U.S. brokers, with millisecond execution. Dividends are credited directly, and splits are reflected in real time.
- **Fractional share trading:** No need to buy a whole expensive share—purchase as little as 0.01 shares, or even less, based on your budget.
- **Transparency and security:** All stock token trades are recorded and verifiable on-chain, reducing opacity associated with traditional intermediaries.
- **Blockchain integration:** Stock tokens can integrate with DeFi—for example, as collateral for crypto loans—something difficult to achieve in traditional finance.
- **Fee structure:** Bitget periodically offers zero-fee trading promotions, especially attractive for high-frequency traders.
- **Shared fund pool with spot account:** Bitget's unified account enables convenient transfer and streamlined operations.
- **Focused on high-profile stocks:** Trade top tech giants and crypto-related stocks like TSLA, NVDA, AAPL, MSTR, and META—high-interest, high-volatility names.

Who are Bitget stock products for?

Bitget's stock products are best suited for aggressive traders familiar with crypto futures who prefer not to open traditional U.S. brokerage accounts, actively use leverage, want near-24/7 trading flexibility, and frequently trade both crypto and stock markets.

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1. Investors bullish or bearish on U.S. stocks without a traditional account

Skip brokerage paperwork, cumbersome overseas KYC, and USD transfers. Trade Apple, Tesla, Nvidia, Coinbase, and others directly with USDT in your wallet.

2. Traders comfortable with crypto interfaces and 24/7 markets

The interface, order types, leverage adjustment, position management, and funding mechanics closely mirror BTC/USDT or ETH/USDT perpetual futures. Trading is available nearly around the clock from Monday to Saturday, far exceeding traditional market hours.

3. Investors seeking amplified exposure with leverage

Leverage of up to 100x, significantly higher than the 2x–4x margin typically offered by traditional brokers, greatly amplifying exposure to volatility.

4. Traders engaged in both crypto and traditional stock markets

With one account, one USDT balance, and one app, switch seamlessly between BTC/ETH futures and NVDA, TSLA, or META—no cross-platform transfers needed, greatly improving capital efficiency.

5. Short-term investors hoping to short overvalued tech stocks or capture volatility

Short Tesla, Nvidia, Meta, and other high-valuation stocks directly, without stock-borrowing constraints (note: funding rates may rise in extreme one-sided markets, so monitor funding direction when shorting).

6. Experienced participants in the crypto space

Shorting tech stocks or going long on defensive stocks via stock perps can achieve a degree of portfolio hedging against crypto-concentrated risk.

7. Traders using small-capital, high-frequency, or grid strategies

Low fees, USDT settlement, familiar API access, and relatively high leverage make Bitget stock perps well suited for grid bots, Martingale bots, and other automated strategies.

8. Investors interested in the RWA sector

Bitget stock perps are one of the most mature and liquid on-chain RWA derivatives available, suitable for those seeking early exposure to the RWA narrative.

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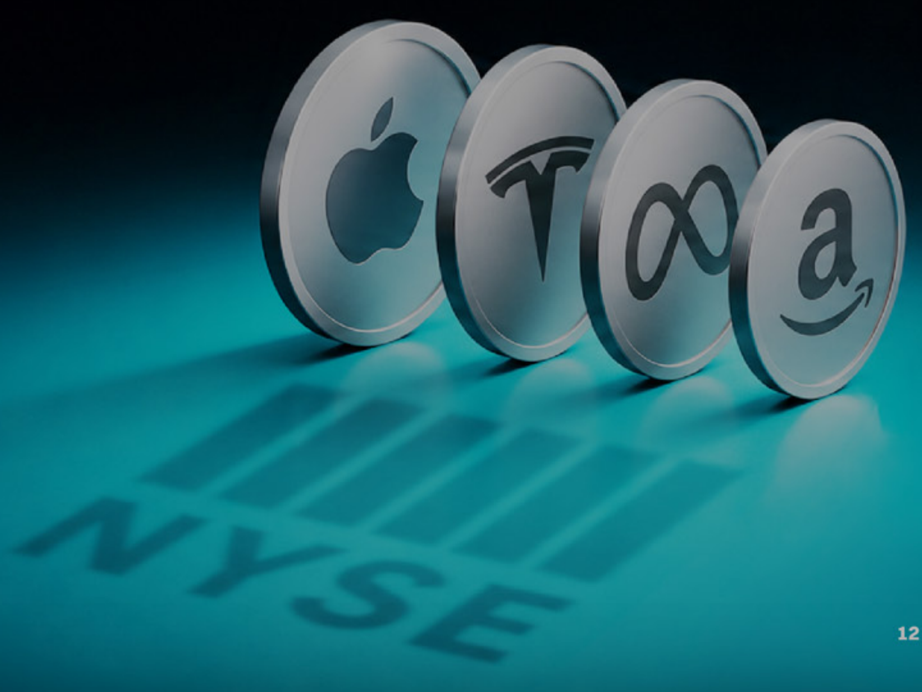
Making your first stock trade on Bitget



2.1

Overview of Bitget stock markets

How to access the Bitget stock market data section

1 Update the Bitget app to the latest version, tap Markets on the bottom nav bar, then select the Stocks tab at the top to enter the Bitget stocks section.

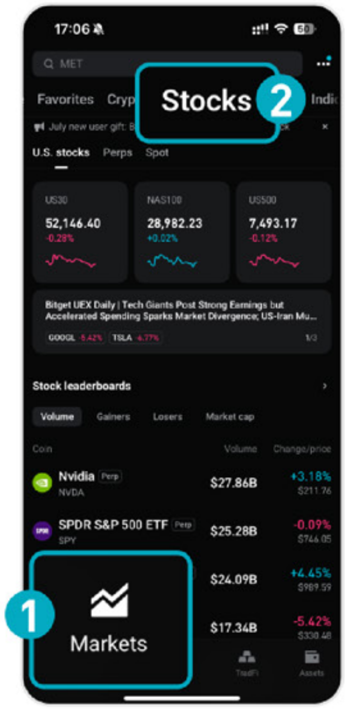
2 Within the Stocks section, a range of market data helps you understand real-time conditions and trends across different sectors and concepts:

Hot stocks
Automatically highlights trending tokenized stocks

Latest market insights
Stay informed about global markets in Bitget UEX

Trending themes
Displays trends across concepts to support trading decisions

Earnings calendar
Presents key quarterly earnings dates in a calendar view



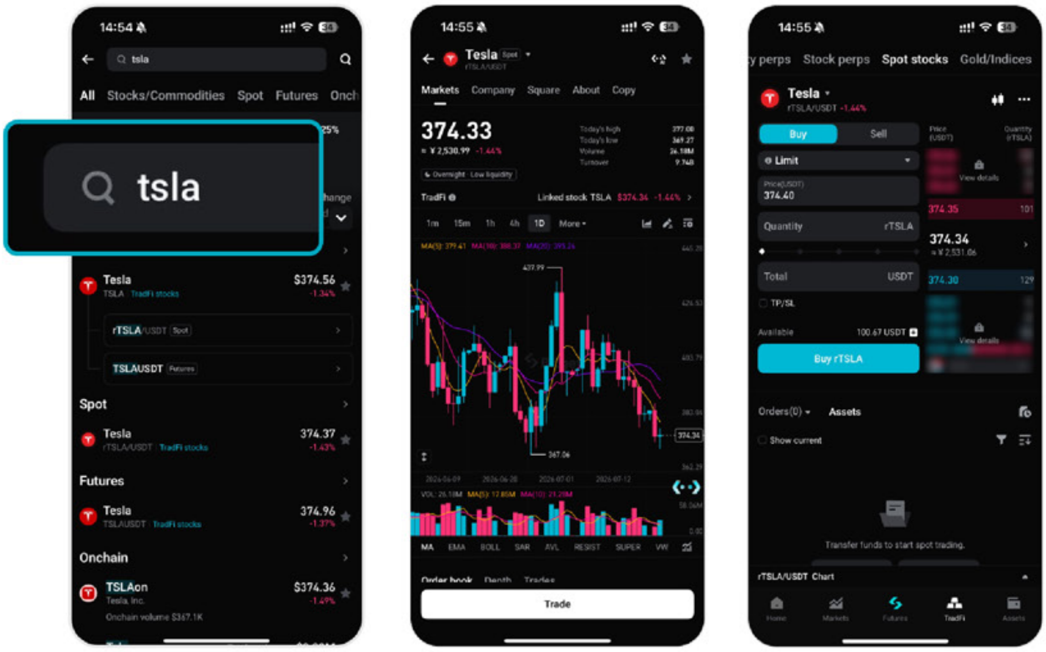
On an individual stock page, users can view price charts across multiple timeframes, and choose to trade tokenized stocks or stock perps at the bottom.

2.2

How to place your first spot stock trade

How to access the Bitget spot stock trading page

Search for a stock ticker (for example, TSLA), then tap the corresponding token (such as rTSLA) to open its trading page. After selecting your trading pair, you can begin trading and managing orders.



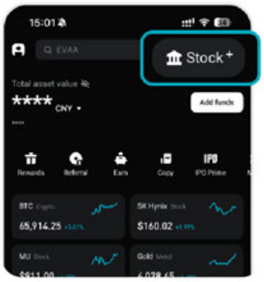
- **Select a suitable order type:**
  1. **Market order:** Executes immediately, best for rapid entry.
  2. **Limit order:** Set a specific price and quantity. The order enters the order book and executes once the market price is reached. Bitget supports zero-gas limit orders.
- **Enter quantity:** Set your position size based on your available funds.
- **Set TP/SL:** Strongly recommended for risk management. For example, when going long, set an SL below your entry price to help manage risk.
- **Tap Buy/Sell to confirm:** After the order executes, view the details in the Positions tab, including unrealized PnL.
- **Close a position:** Go to the Positions page, and select Market Close, or set a Limit Close.

2.3

How to place your first Stock+ trade

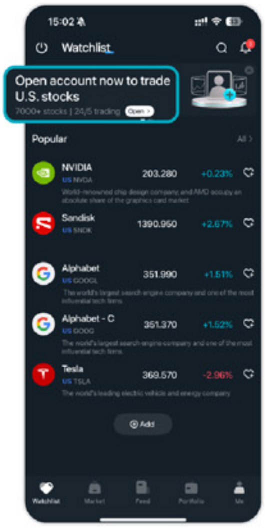
Step 1 · Access Bitget Stock+

Open the Bitget app and tap Stock+ in the upper-right corner of the homepage to enter the U.S. stock trading section.



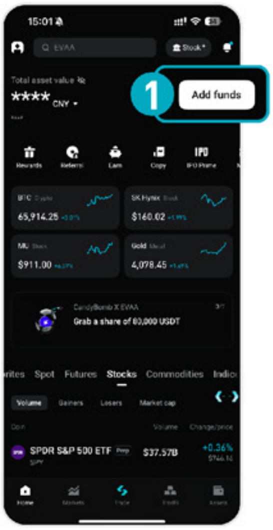
Step 2 · Open a U.S. stock account (first-time users only)

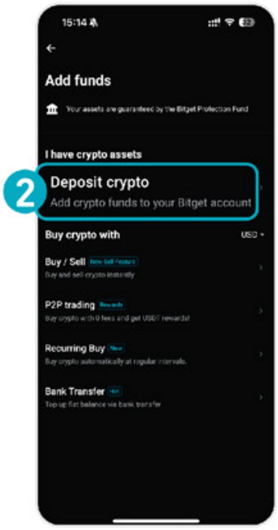
Select Open Now → complete identity verification if you haven't already → fill in your account information.

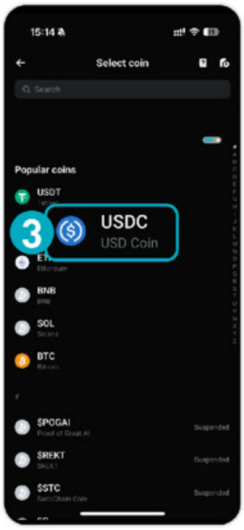


Step 3 · Deposit funds

Go to the app's homepage → select Add Funds → select Deposit Crypto → select USDC → choose a network and complete the deposit.

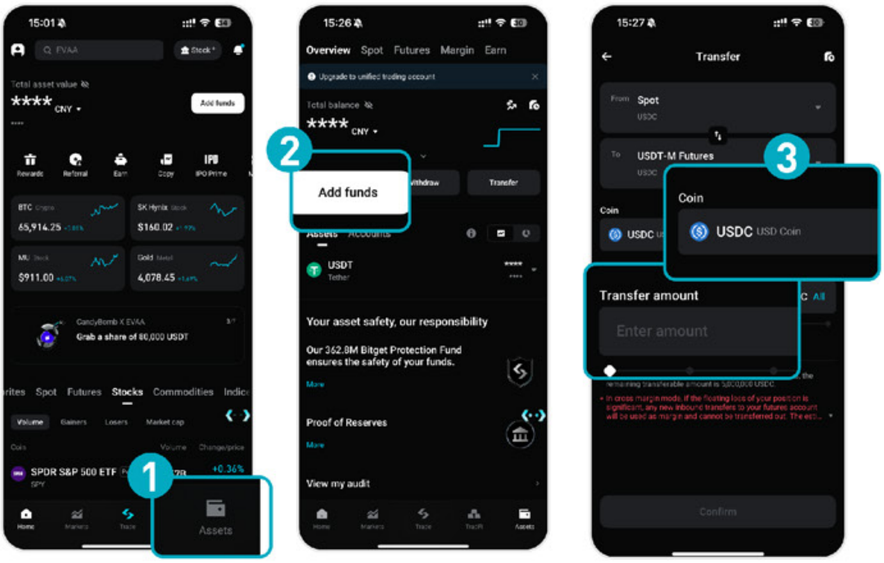






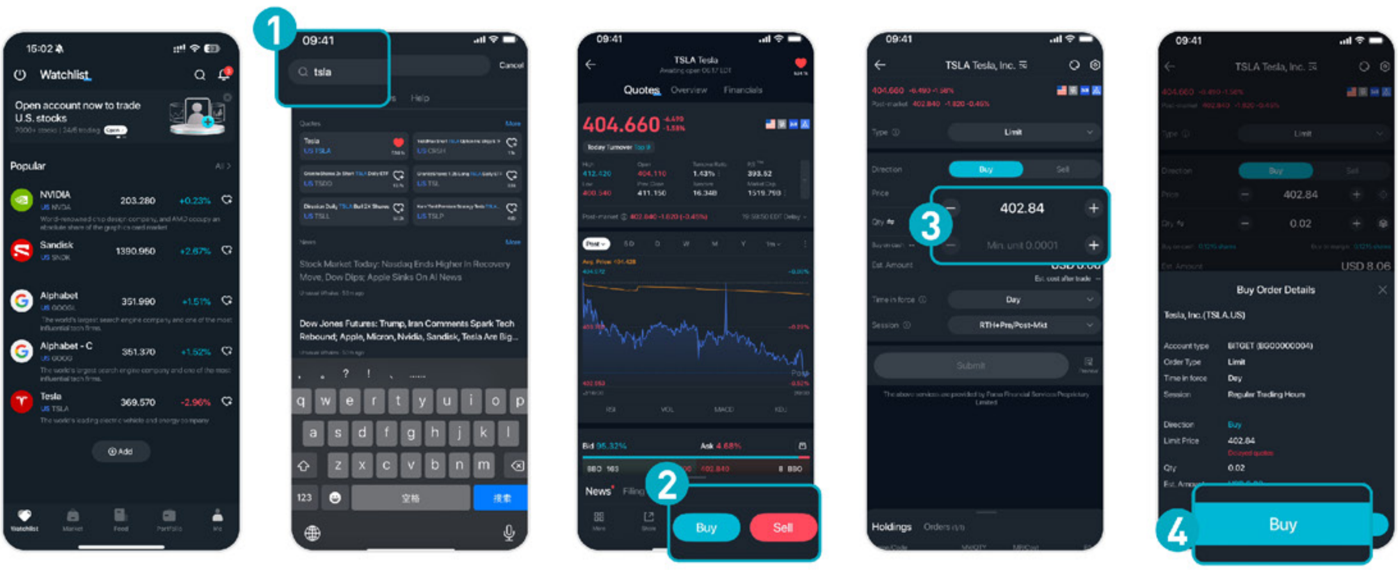
Step 4 · Transfer funds (USDC to your securities account)

Recommended: Go to Portfolio → select Transfer → select USDC and enter the amount → confirm the transfer.



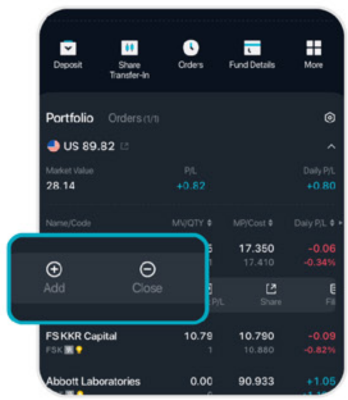
Step 5 · Buy and sell U.S. stocks

Browse the stock list or search a ticker (e.g., AAPL, NVDA, TSLA) → open the details page → select Buy or Sell → enter the quantity/price and submit your order.



Step 6 · View and manage your holdings

Go to Portfolio to view positions and order records. You can increase, reduce, or close positions anytime.

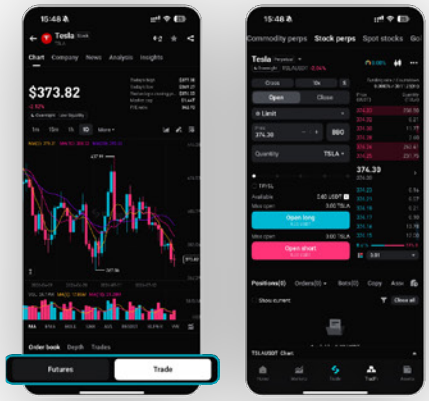


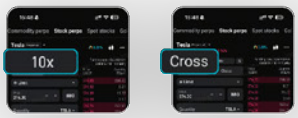
2.4

How to place your first stock perps trade

How to access the Bitget stock perps trading page

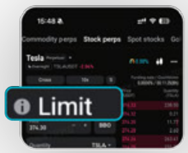
On the stocks tab in the Markets section, select a stock ticker (e.g., TSLA) to enter the perps trading interface (e.g., TSLAUSDT perps).





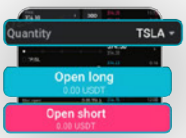
1. Set leverage and margin mode

Default may be 10x; beginners are recommended to start at 1x-5x, up to a max of 25x. Cross, isolated, and unified account modes are supported.



2. Select an order type

Market orders execute immediately for fast entry; limit orders specify a price for precise execution.



3. Opening direction and quantity

Long (bullish) / short (bearish). Position value is calculated automatically (e.g., 100 USDT × 5x = 500 USDT).

4. Set TP/SL

Check TP/SL when placing your order and enter your target prices; enable a trailing stop to protect profits.

5. Place the order

Check all parameters → tap Open Long/Open Short → Confirm. Once placed, monitor real-time PnL, liquidation price, and funding rate on the Positions page.

PRACTICAL TIPS

- Start with a small amount (50–100 USDT) and consider demo trading first.
- Always set a stop-loss and keep risk per trade within 1–2% of your account.
- Watch Bitget announcements: leverage tiers and maintenance margin rates adjust dynamically with market risk.

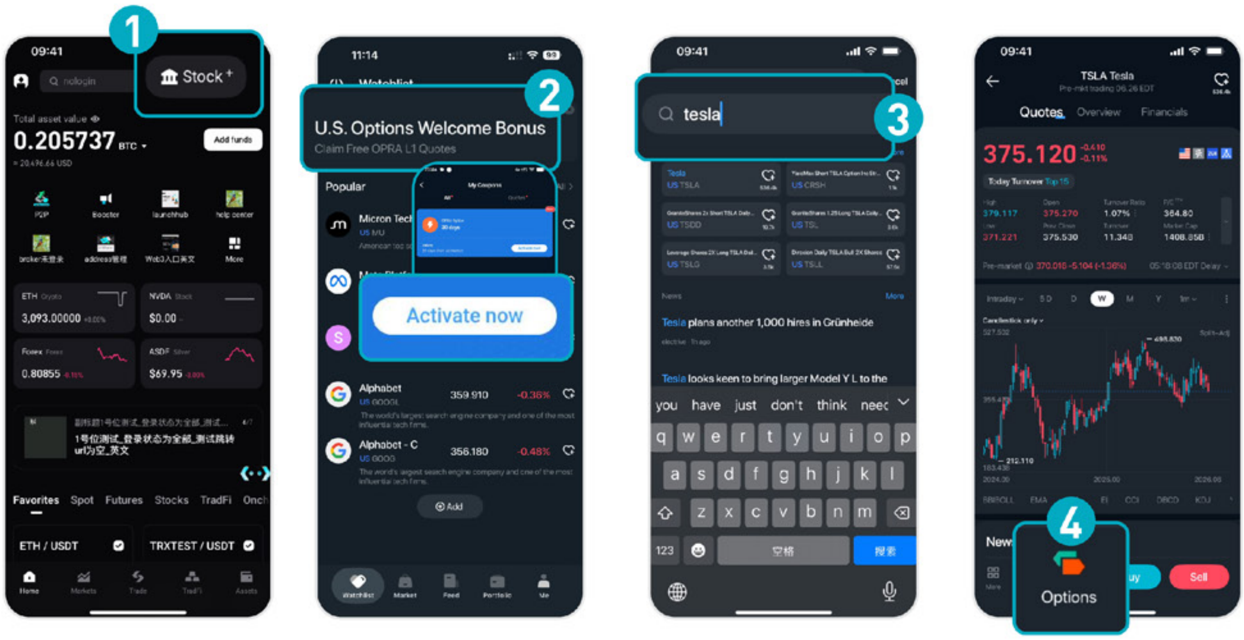
2.5

How to place your first stock options trade

Simply update the app, make sure you've completed identity verification for your Bitget account, and transfer USDC to the corresponding account—then you're ready to trade U.S. stock options.

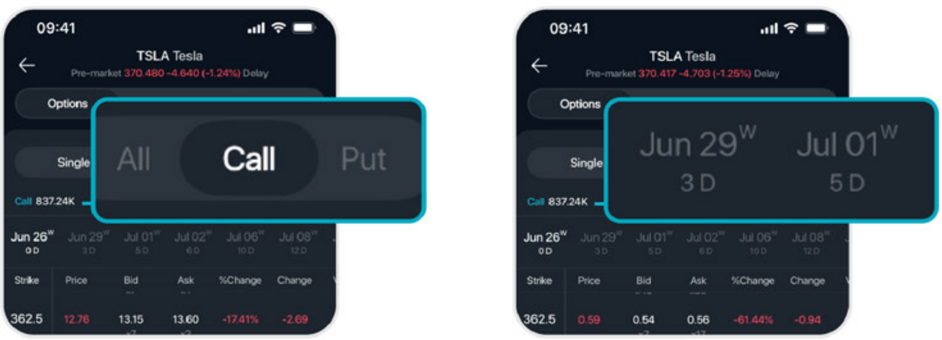
Step 1 · Open the stock options page

Tap Stock+ in the upper-right corner → claim and activate the options market data card → search for a ticker (e.g., TSLA, NVDA, SPY) → tap Options at the bottom of its details page.



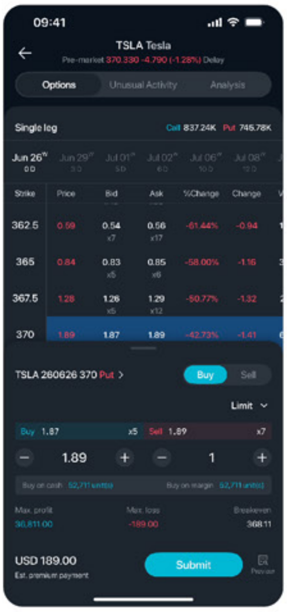
Step 2 · Browse available options

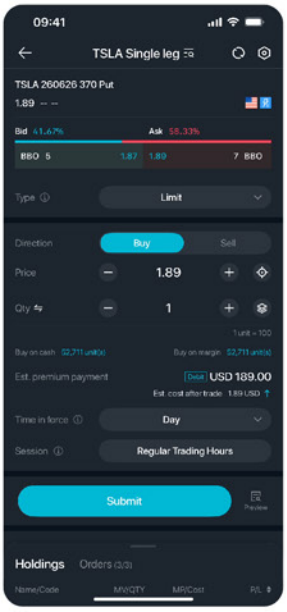
Switch between call and put options; swipe to browse different expiration dates and strike prices; review prices, implied volatility, and the Greeks.

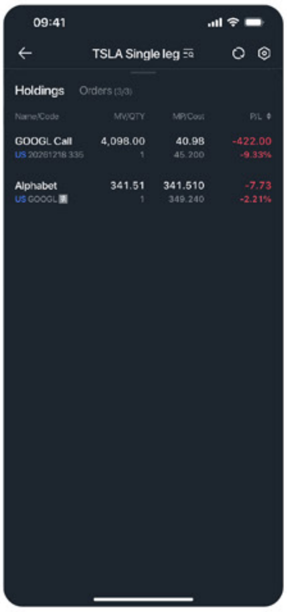


Step 3 · Set up your options order

Select the option contract, choose an order type (limit, market, or conditional), enter the price and number of contracts; swipe up to view current positions and today's orders.

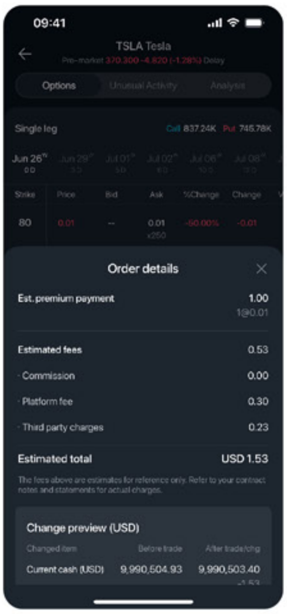






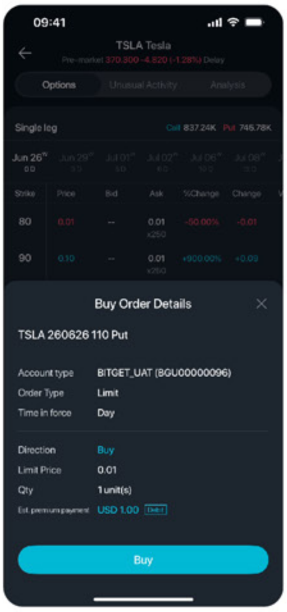
Step 4 · Preview your order

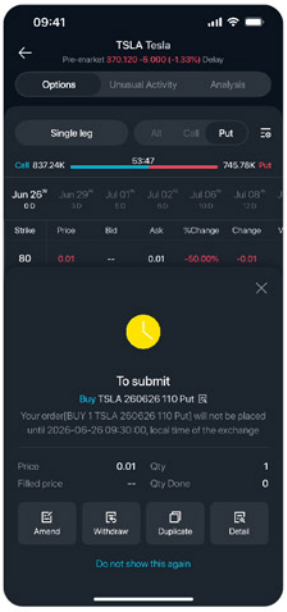
Before submitting, carefully review **the option type (call/put), strike price, expiration date, premium (estimated total payable), and number of contracts and fees** to avoid losses from an incorrect expiration date or direction.

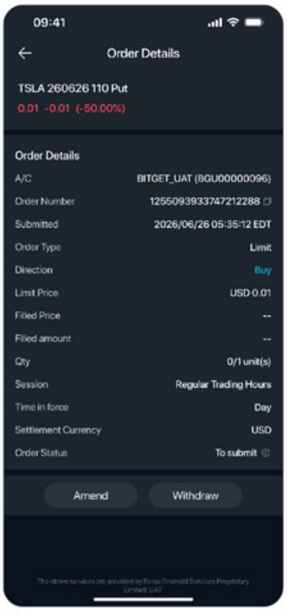


Step 5 · Submit and manage your order

Tap Submit to place your order. Afterward, you can modify the price or cancel at any time (subject to order status); once filled, view and manage your positions on the positions page.







FAQ AND TRADING TIPS

- **Zero commission:** All users currently pay no commission, though premiums and other trading costs still apply.
- **Leverage and margin:** Long calls/puts require 100% margin and support cash trading only (margin financing not yet supported).
- **Risk management:** Options have time decay—set TP/SL levels and factor this into your market analysis.

UNIT

03

Foundational strategies

3.1

Trading earnings season

Stock perps

Bitget stock perps offer up to 100x leverage and 24/7 trading flexibility. If you are confident in a company's fundamentals, you can trade around earnings announcements while using TP/SL orders to manage risk. Most U.S.-listed companies release earnings 2–5 weeks after quarter end.

EXAMPLE · TRADER A

Trader A, familiar with Nvidia's financials, expects earnings to beat expectations on October 19 at 5:00 PM ET:

Strategy: Oct 19, 4:00 PM — NVDA at $185, 25x long, $1000 capital, 2% SL, 6% TP
Order parameters: Entry $185; SL $181.3; TP $196.1

This example shows how stock perps can amplify directional returns during earnings moves. However, stop-loss orders on leveraged perps are vulnerable to gap risk—if the price gap exceeds your SL level, it may fail to execute, resulting in liquidation. If capping your maximum loss matters more than maximizing returns, consider options instead.

EXAMPLE · TRADER B (OPTIONS INSTEAD OF PERPS)

Before earnings, NVDA trades at $185. Trader B expects a beat and buys one call expiring one week later at a $190 strike, paying a $4.50/share premium ($450 total). After earnings, NVDA gaps up to $205; the call rises to about $16.50/share ($1650), for a profit of about $1200 (~267% return).

If NVDA instead falls to $170, Trader B's maximum loss is capped at the $450 premium—no margin call or liquidation risk.

TIP

Stock perps are best when you have strong directional conviction and can tolerate liquidation risk. Options (currently long calls/puts only) are better when you want to cap your maximum loss or have less conviction on direction.

3.2

Basic fundamental analysis

Beginners don’t need complex models—just three things matter:

1

Expectations

How high are market consensus expectations?

2

Trend

Is the company’s growth narrative favorable?

3

Price level

Is it in a trend pullback or emotional peak?

EXAMPLE · TRADER B

Watching TSLA, Trader B notices delivery and margin expectations are relatively high, and TSLA has often sold the news after earnings. Instead of chasing the move at the release, Trader B only trades on confirmation: go long if the price breaks above and holds a key resistance level after earnings; go short if it breaks below and fails to reclaim a key support level. The core idea is using expectation gaps to turn directional risk into conditional, trigger-based trades.

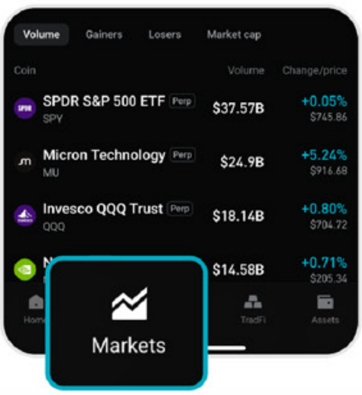
Company valuation feature

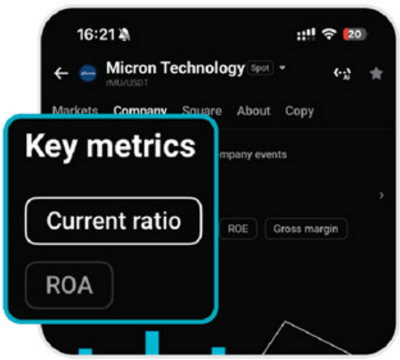
Tap Markets on the bottom nav bar, switch to the Stocks tab, then select a stock to view, e.g., MU (Micron).

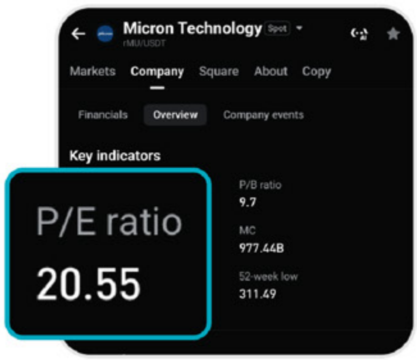
Enter the trading page and tap Company > Overview to view the Key Indicators section, which includes the P/E and P/B ratios. Their formulas are shown below:

P/E (price-to-earnings) = share price ÷ earnings per share (EPS = net profit attributable to shareholders over the last 12 months ÷ total shares outstanding)

P/B (price-to-book) = share price ÷ book value per share (book value per share = shareholders’ equity ÷ total shares outstanding)







3.3

Technical indicators for beginners

Candlestick patterns are among the most practical tools for learning stock analysis. By observing candle shapes and their arrangement, traders can gauge market sentiment. However, patterns only suggest potential price movements and cannot predict direction with certainty—they should be used as a supporting reference tool.

Shrinking body

Uptrend: weakening bullish momentum, often followed by consolidation or a deeper pullback. Downtrend: weakening selling pressure, often followed by consolidation or a rebound.

Color change

A red candle in an uptrend usually reflects a normal pullback. A green candle in a downtrend often reflects a short-lived rebound, not a reversal.

Long wick

Long upper wick in an uptrend: a push higher was rejected, indicating heavy resistance. Long lower wick in a downtrend: a drop was bought back, indicating strong support.

Inverse long wick

Long lower wick in an uptrend: a pullback was bought up, showing valid support. Long upper wick in a downtrend: a rebound was sold into, showing continued resistance.

Inside candle

Uptrend: a pause within the move, often followed by continuation upward. Downtrend: a pause within the decline, often followed by continuation downward.

Momentum candle

A strong bullish candle in an uptrend increases the odds of continuation; a strong bearish candle in a downtrend increases the odds of acceleration. Its key value is confirming breakout quality, not blindly chasing moves.

UNIT

04

Intermediate strategies

Carry trades using stock perps

Under the unified margin system, rToken spot stocks support multi-asset margin and can collateralize products like perps. Stock+, using a separate securities account, typically does not participate. Carry strategies are therefore better suited to structured positions within the same margin pool, with returns driven by funding rates or spreads rather than direction.

EXAMPLE · TRADER C

Anticipating a period of risk events with unclear direction, Trader C wants structural yield: identify a stock perp with a high funding rate, such as TSLA. Build a carry portfolio by buying rTSLA spot stock while shorting an equivalent TSLA perp position, potentially generating attractive stablecoin-like yields.

TSLA FUNDING RATE

+0.0135%

Per 6 hours · 29.565% APR

4.2

Holding real stocks with protective puts

This strategy suits long-term investors who already hold real U.S. stocks through Stock+ and want to hedge their position without selling their shares.

EXAMPLE · TRADER D

Trader D buys 100 shares of AAPL at $220/share ($22,000 total). At the same time, Trader D buys 1 AAPL put with a $210 strike expiring in 3 months, paying about $5/share ($500 total premium):

- If AAPL falls below $210—whether to $180 or $150—the put guarantees a sale at $210, capping the max loss at (220-210)×100+500=$1500, rather than unlimited downside.
- If AAPL rises, Trader D still captures the full upside, losing only the $500 premium.
- There is no liquidation risk throughout, since no leverage is used and no option-selling obligation is involved.

TIP

This strategy uses only long puts, fully aligned with the options buying permissions currently available on the platform.

4.3

Hedging between crypto and stock perps

With a shared margin pool, you can hold BTC futures and stock perps simultaneously, managing both legs within one margin system—well suited for correlation and relative-strength trades.

EXAMPLE · TRADER D

On Oct 10, Trader D observes a major crypto liquidation event and expects continued downside pressure, but wants to hedge systemic risk using tech stocks. Positions opened Oct 13 with $1000 capital:

Strategy: Short BTC (10x), long AAPL (10x)
Order parameters: Short BTC at $115,000 (now $87,000); long AAPL at $247 (now $272)

+2434
BTC short PnL

+919
AAPL long PnL

Result: total unrealized profit ≈ $3353.

Intermediate-level technical indicators

Technical indicators are quantitative tools based on statistical methods to assess market trends. With so many indicators available, prioritizing the most commonly used ones is the first step to using them effectively.

RSI 14

Trend usage: In an uptrend, an RSI pullback to 40-50 often marks the end of a correction; in a downtrend, a rebound to 50-60 often marks the end of a bounce.

Range usage: RSI above 70 suggests a possible pullback; below 30 suggests a possible rebound.

Application: Use RSI to gauge momentum, not as a standalone entry trigger—always combine it with key price levels.

MACD 12,26,9

Zero-axis filter: A golden cross above the zero line is more bullish; a death cross below is more bearish.

Momentum confirmation: Expanding histogram bars after a golden cross confirm strength better than contracting bars.

Divergence: Caution if price makes new highs but MACD doesn't, and vice versa.

Application: Use MACD to confirm whether trend momentum is genuinely developing.

Bollinger Bands (20, 2)

Contraction to expansion: A high-volume breakout above or below the bands after a squeeze increases the odds of a new trend.

Middle band as boundary: Holding above the middle band suggests bullish bias; below suggests bearish bias.

Application: A breakout followed by a pullback that holds the middle band confirms a bullish signal; a breakdown followed by a failed reclaim confirms a bearish signal.

COMBINING THE THREE INDICATORS

Long setup

Bollinger breakout holding the middle band; MACD golden cross strengthening; RSI back above 50

Short setup

Bollinger breakdown below the middle band; MACD death cross strengthening; RSI back below 50

UNIT

05

Advanced strategies

5.1

Trading macro events

Macro trading is about scenario planning: different data outcomes lead to different paths. Stock indices or stock perps offer the most efficient execution, with crypto futures as a correlated leg.

CPI

Higher than expected: Rate-hike expectations rise; growth stocks and the Nasdaq face pressure

Lower than expected: Rate-cut expectations rise, boosting risk appetite

In line with expectations: The market likely reverts to range-bound trading or earnings take over as the main driver

Unemployment rate

Rises significantly: Raises expectations of an economic slowdown, typically reducing risk appetite

Stays low: Supports a resilient-growth narrative, but may also reinforce expectations of prolonged high rates

EXAMPLE · TRADER E TRADES CPI WITH BITGET QQQ PERPS

Approach: Cautious ahead of the release with a small hedge position; once CPI confirms below expectations, switch to a long trend-recovery trade.

Step	Action	Profit
Dec 17, day before release	Short QQQ at $613.06, 10x, $1000 capital, closed at $600.41 (~2.06% drop)	≈ 206 USDT
Dec 18, after CPI release	Long near $607, 20x, $1000 capital, took profit near $612 (~0.824% gain)	≈ 165 USDT

Total profit (both legs): approx. 206 + 165 = 371 USDT

5.2

Managing futures risk

A shared margin pool offers high capital efficiency—but it also demands stricter account-level discipline.

Account level

Stop trading once a max daily loss threshold is hit; reduce leverage and size once a max drawdown threshold is hit

Strategy level

Set a loss quota per strategy to prevent multiple strategies from losing simultaneously

Trade level

Define your max acceptable loss first, then size the position based on your stop-loss distance

EXAMPLE · TRADER F

Before trading QQQ perps, Trader F locks in the risk: $10,000 account, max 1% loss per trade (100 USDT). Long QQQ at $610, SL at $605.12 (~-0.8%). Back-solving from the 100 USDT cap: notional size = 100 / 0.8% = 12,500 USDT; at 20x leverage, margin required is about 625 USDT.

2R TARGET	3R TARGET
+200 USDT	**+300 USDT**
TP at $619.76 (+1.6%)	TP at $624.64 (+2.4%)

Whichever way the market moves, the worst case is a 100 USDT loss, while a winning trade earns at least 200–300—fixing the risk-to-reward ratio at 1:2 or 1:3. This guide progresses by difficulty, letting readers start with foundational strategies and gradually advance to combined and macro-driven approaches, building a repeatable trading skill set.

Appendix

Below is a glossary of the most commonly used terms for Bitget stock perps and options trading, ideal for beginners and daily reference.

Common Bitget stock perps terms

Term	Basic definition
Futures type	Bitget mainly offers USDT-M perpetual futures (like BTCUSDT), Coin-M perpetual futures (like BTCUSD), and Coin-M delivery futures.
Perpetual futures	No expiration date; can be held indefinitely, with a funding-rate mechanism keeping prices aligned with spot.
USDT-M/USDC-M futures	Use USDT or USDC as the margin and PnL settlement asset—the most common and intuitive type.
Long/Open long	Taking a bullish position by buying in anticipation of a price increase.
Short/Open short	Taking a bearish position by selling in anticipation of a price decrease.
Leverage	Common range: 5x–25x, amplifying both profits and risks.
Margin	Funds required to open and maintain a position.
Initial margin ratio	Margin ratio required to open a position, calculated as 1 ÷ leverage.
Maintenance margin rate	The minimum margin rate required to maintain a position. Falling below this triggers liquidation.
Liquidation	The system automatically closes a position at market price when available margin is insufficient.
Mark price	A fair reference price used to calculate unrealized PnL and trigger liquidation, preventing manipulation.
Funding rate	Unique to perpetual futures—longs and shorts periodically exchange payments (typically every 4 hours for stock perps).
Unrealized PnL	Floating PnL based on the current market price, not realized until the position is closed.
Realized PnL	PnL realized after a position is closed.
Open/close position	Open a new long or short position, or close an existing position via the opposite trade.
Market/limit order	Executed instantly at the best price, or only when a specified price is reached.
Take-profit/stop-loss	Set a target price to automatically close the position for profit or to limit loss.
Position mode	One-way mode vs. hedge mode (Bitget supports hedge mode, allowing simultaneous long and short positions).
Margin mode	Isolated: margin is allocated independently per position. Cross: all account funds are shared as margin—more resistant to liquidation but exposes more funds to loss.
Risk limit	Different position sizes correspond to different maximum leverage limits—larger positions allow lower leverage.
Fees	Charged on opening and closing positions; maker and taker rates differ.
Open interest/avg. entry price	The current number or value of contracts held; the average cost after multiple entries.
Liquidation price	The price at which liquidation is triggered (very important!)

Common U.S. stock options terms

Term	Explanation
Call option	Gives the buyer the right to buy the underlying asset at the agreed price on the expiration date. Suitable for a bullish market.
Put option	Gives the buyer the right to sell the underlying asset at the agreed price on the expiration date. Suitable for a bearish market or hedging.
Premium	The cost of buying an option and the maximum possible loss for the buyer.
Strike price	The price agreed in the contract for buying or selling the underlying asset.
Expiration date	The date the option expires. If not exercised by then, it automatically becomes void.
In the money (ITM)	For a call, the strike is below the current price; for a put, the strike is above. The option has intrinsic value.
Out of the money (OTM)	For a call, the strike is above the current price; for a put, the strike is below. If still OTM at expiration, it expires worthless.
At the money (ATM)	The strike price is close to or equal to the current price.
Time value	The portion of value that decays over time, accelerating near expiration—an implicit cost for buyers.
Implied volatility (IV)	The market's expectation of future volatility. Higher IV means a more expensive premium.
Automatic exercise	If in the money at expiration, the OCC exercises the option automatically—no manual action needed.
T+1 settlement	Funds and positions settle one trading day later, unlike the real-time settlement used for futures.
Straddle	Buying a call and put with the same strike and expiration to profit from a large move regardless of direction.
Protective put	Buying a put while holding the underlying shares to hedge downside risk—currently supported on the platform.

In a volatile U.S. stock market, you need a trading system that can navigate every cycle.

This guide draws on Bitget's professional insight to help you build a lasting edge in U.S. stock markets. Whether you're new to U.S. stocks or an advanced trader seeking a breakthrough, you'll find the path forward here.

- **Key concepts and getting started**
- **Combined and macro-driven approaches**
- **Strategy execution logic**

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