M A V E R I C K A I

CONNECT CLAUDE TO ROBINHOOD AND LET IT TRADE FOR YOU

THE FULL AGENTIC TRADING SETUP, EVERY TOOL IT GETS, AND THE PROMPTS THAT RUN IT

Robinhood gave Claude its own trading account. This is how you plug it in, what it can see, what it can actually do, and how to run it so that nothing moves without your say-so.

The exact link from the video, and the three-click connector setup in Claude

The Agentic account: why it's separate, how it's funded, what it can't touch

Every tool Claude gets: portfolio, market data, watchlists, scanner, stocks, options, crypto

The Portfolio X-Ray prompt that builds you an overexposure dashboard

The rebalance prompt with a real approval gate, plus a dip-buy rule and a Friday report

How to connect from Claude Code, ChatGPT, Codex, Cursor and Grok

The guardrails that make this reasonable, and the mistakes that make it dangerous

2026 Edition

Claude Has A Trading Account Now

Robinhood launched something called Agentic Trading. The idea is simple and a little wild: you connect an AI to your Robinhood through a link, Robinhood opens a separate account just for the AI, and the AI can see everything you own and place real trades inside its own account. Claude was one of the first it was built for.

I connected it, asked it to analyze my portfolio and tell me where I was overexposed, and got a breakdown a human advisor would charge for. Then I told it to rebalance me so I wasn't sitting 80% in one stock, gave it the green light, and watched it place the trades.

Here's the part that makes this reasonable rather than reckless. It can only trade inside its own separate account, never your main one. You decide how much money goes into that account. And you approve every order before it happens. Those three things are the whole design, and this guide is built around keeping them true.

1

link to paste

1

separate account it trades in

0

trades without your approval

What it can see versus what it can do

Sees (read-only, all your accounts)	Does (Agentic account only)
Every account, position, balance and buying power	Places, reviews and cancels stock and ETF orders
Full order and transaction history, realized P&L;	Places options orders (at your approved options level)
Your watchlists and scans	Places crypto orders, if you have Robinhood Crypto and your state allows it
Live quotes, fundamentals, financials, earnings dates, technicals	Creates and updates watchlists and scanners
Popular watchlists and market indexes	Never moves money in or out. Never touches your main account.

WHAT THE AGENTIC ACCOUNT IS

Robinhood calls it "a type of self-directed, individual investing account." It sits next to your main account, counts toward your limit of ten individual accounts, and it's the only place the AI can place orders. You fund it by transferring money into it inside the Robinhood app. Whatever you put in is the most the AI can ever work with. That transfer is your risk ceiling.

Step 1: Get The Link And Connect It

The video says Google "Robinhood MCP," click the first link, and copy the link at the bottom. Here's exactly where that goes so you don't have to hunt.

THE TWO LINKS YOU NEED

The page: Robinhood Agentic Trading overview (robinhood.com, Support). The link at the bottom of it, the one you paste into Claude: https://agent.robinhood.com/mcp/trading

STEP 1: Open Connectors in Claude

In Claude (desktop app or claude.ai), on the left side click **Customize**, then **Connectors**. Click **Add** (top right), then **Add custom connector**. That's how Claude talks to any tool with an MCP link. Pro and Max plans.

STEP 2: Paste the link

Name it **Robinhood Trading**. In the URL field paste **https://agent.robinhood.com/mcp/trading**. Leave the advanced settings alone. Click **Add**.

STEP 3: Sign in to Robinhood

Click **Connect** on the new Robinhood card. A robinhood.com login page opens in your browser. Sign in there, on Robinhood's own page (check the address bar says robinhood.com), and approve the connection. You never type your Robinhood password into Claude.

STEP 4: Open and fund the Agentic account

During that sign-in, Robinhood prompts you to open your Agentic account and accept its agreement (**desktop browser** required). Then, in the Robinhood app, transfer the amount you want the AI to work with into the Agentic account. Start small; a few hundred dollars is plenty to learn on.

STEP 5: Turn it on in the chat

In a new Claude conversation, open the tools menu by the message box and switch Robinhood Trading on. Say "Read my Robinhood accounts and tell me what you see." If it lists your accounts, positions and buying power, you're connected.

HEADS UP

Troubleshooting. Nothing happens on Connect: pop-ups are blocked, allow them for claude.ai. "Not connected" after it worked yesterday: the login expired, click the card and sign in again. Reads accounts but won't place orders: the Agentic account isn't opened or funded, or the market is closed and you asked for a market order (after hours, limit orders only).

Every Tool Claude Gets

Once connected, Claude has around sixty tools from Robinhood. You never call them by name, you just ask, but knowing what's in the box tells you what you can ask for. Here's the whole box in plain English.

Family	What Claude can do with it	Example ask
Account and portfolio	List accounts, portfolio value, buying power, realized P&L;, trade history, and search.	"What's my realized P&L; this year, by ticker?"
Market data	Price history, fundamentals, financial statements, price and book data, technical indicators, earnings results and the earnings calendar, indexes.	"Show me the 200-day trend and next earnings date for everything I hold."
Watchlists	See yours and Robinhood's popular lists, create and update lists, add or remove stocks and options.	"Build a watchlist of dividend ETFs with expense ratios under 0.1%."
Scanner	See filter options, create a scan, run it, update its filters and settings.	"Scan for S&P; 500 stocks down 10% this month with rising revenue."
Stocks and ETFs	Positions, tax lots, quotes, order history, tradability check, review an order, place it, cancel it.	"Review a $100 buy of VTI and show me the estimated fill."
Options	Chains, quotes, historicals, positions, orders, your options level, review, place, cancel.	"What would a covered call on my 100 AAPL shares pay this month?"
Crypto	Tradable pairs, quotes, positions, orders, preview, place, cancel. No transfers, staking or lending.	"Preview buying $50 of BTC in the agentic account."

THE PATTERN THAT MATTERS: REVIEW, THEN PLACE

Every order family has a review tool and a place tool. Review returns the real estimated price, cost and any warnings without doing anything. Place is the real thing. The prompts in this guide always make Claude review first, show you the result, and wait. That's the approval gate.

TIP

The tax-lots tool is quietly one of the most useful things here. Ask Claude which lots to sell to keep a gain long-term, or to harvest a loss, before you trim anything in your main account by hand.

Prompt 1: The Portfolio X-Ray

This is the "tell me where I'm overexposed" prompt from the video, expanded so the answer is specific instead of vibes, and so it builds you something you can click.

PROMPT 1: WHERE AM I OVEREXPOSED

```
Read my Robinhood accounts through the connector.
Analyze my whole portfolio and tell me where I'm
overexposed: single-stock concentration, sector
concentration (look through my ETFs to what they
actually hold), and how correlated my holdings are
with each other over the last year of daily prices.
Use real data from the connector, not guesses, and
say when a number is an estimate. Then build me an
interactive artifact called Portfolio X-Ray: one
card per position with its weight, a concentration
meter, a sector breakdown, a correlation table, and
a plain-English risk grade with the ONE change that
would lower my risk the most. Do not place any
trades. This is analysis, not advice; I decide.
```

What came back

On my test account (four holdings, one of them 60% of the total), the X-Ray graded it a D. It showed the big position was 3.6 times the next one, that looking through the S&P; ETF I was actually 82% tech, and that all four holdings moved together on about seven days in ten. The one change was a specific trim into a broad, non-tech ETF, with the note to check cost basis and holding period first. The artifact had a meter that turned red above 25%, a sector bar with the ETF decomposed, and a card per position you could expand.

WHY "LOOK THROUGH MY ETFS" IS IN THERE

If you hold a big tech stock and an S&P; 500 fund, you own that stock twice. Most people's real concentration is higher than the position list suggests. The connector doesn't expose fund holdings, so Claude pulls those from public fund data and should say so.

HEADS UP

Claude's read of your risk is a model's read. It can be wrong about a sector, miss a correlation that only shows up in a crash, or grade on incomplete data. Treat the X-Ray as a second opinion that's fast and free, not a verdict. Robinhood's own line: you are responsible for every trade the agent places.

Prompt 2: Rebalance, Then Wait For The Green Light

Now the part where it trades. Same chat. This is built so Claude designs the whole thing, reviews every order with Robinhood for real prices, and then stops dead until you say a specific phrase. Fill in the targets.

PROMPT 2: THE REBALANCE

```
Design a rebalance for my AGENTIC account only. Use
the cash in it; my main account is context, never
touch it. Targets: no single stock above [25]% of
the agentic account, at least [half] of the invested
amount in broad index ETFs, keep [$200] cash. Use
broad ETFs unless I name a stock. Show me the exact
orders as a table: ticker, side, dollars, order
type, and why. Review every order with the
connector's review tool so I see real estimated
prices, cost and warnings. Then STOP and wait. Do
not place anything until I reply with the exact
words PLACE THE ORDERS.
```

What happens on screen

Claude reads the agentic account, builds a table of orders that hit your targets, runs each one through Robinhood's review tool, and shows you the estimated fills, total cost and any warnings (dollar-based fractional orders fill as market orders during regular hours, for example). Then it stops. When you type **PLACE THE ORDERS**, it places exactly those lines, then reads the account back and shows you the fills.

YOU ARE ALWAYS THE LAST CLICK, TWICE

First, the phrase. "GO" is too easy to type by accident, which is why the prompt uses PLACE THE ORDERS. Second, Claude itself asks permission before running a tool that changes something. When the place-order prompt appears, choose allow **once**. Never pick "always allow" for a tool that places or cancels orders, or you've removed the gate.

TIP

Want to change one line? Say "swap XOM for a broad energy ETF and re-review." It redoes the table and waits again. You can go around as many times as you like before the phrase.

Prompt 3 And 4: Rules And Reports

Robinhood's own example of what an agent can do is "buy $100 every time the price drops 2%." Here's that rule written so it's safe, and the honest version of how it runs.

PROMPT 3: THE DIP-BUY RULE

```
Set up a rule for my agentic account: on any
trading day where [SPY] is down [2]% or more from
the previous close when you check at [3:30pm ET],
prepare a $[100] buy of [SPY], at most once per
day, and only if cash after the buy stays above
$[200]. Review the order and show it to me with the
price, then wait for my approval. Never place it on
your own. If the connector is not signed in, tell me
and do nothing.
```

In a normal Claude chat this rule only runs when you say "check the rule." To make it run by itself, turn it into a scheduled task in the Claude desktop app (Claude Code, then Routines, or Cowork's scheduled tasks): weekdays at 3:30pm, with the Robinhood connector attached to the task. Each run checks the price, reviews the order if the rule fires, and pings you. You reply to approve. If you don't, nothing happens. Scheduled runs are hourly at most, so this is not a real-time trigger, it's a once-a-day check, which is the point.

PROMPT 4: THE FRIDAY REPORT

```
Every Friday at [5pm ET], build me a one-page
report on my agentic account as an artifact I can
reopen at the same link: what you traded this week,
realized and unrealized P&L; per position, anything
I hold that reports earnings in the next two weeks,
and one thing you'd change and why. Update the same
artifact each week, don't make a new one. If it's a
market holiday, use Thursday's close and say so.
```

HEADS UP

The one thing that breaks scheduled rules: the Robinhood login expires. When it does, every tool call fails and the rule quietly does nothing, usually on the volatile week you set it up for. That's why prompt 3 says "if the connector is not signed in, tell me." When you get that ping, click the Robinhood card in Connectors and sign in again.

Bonus Prompts

Three more that use tools most people never touch. No trades in any of them.

BONUS: EXPLAIN EVERY POSITION TO ME

```
For each position I hold, in both accounts, tell me
in three sentences what the company or fund actually
does, how it made money last quarter, when it next
reports earnings, and whether I'm up or down on it
and by how much. Use the fundamentals and earnings
tools. Flag anything I hold that you'd struggle to
explain in one sentence.
```

BONUS: THE TAX-LOT CHECK

```
Before I sell anything in my main account, look at
my tax lots for [TICKER]. Tell me which lots are
long-term, which are short-term, the gain or loss
on each, and which specific lots I'd sell to trim
[X] shares with the smallest tax hit. Don't place
anything; I'll do the sale myself.
```

BONUS: BUILD ME A SCANNER

```
Create a scan in Robinhood called [NAME] that finds
[what you want, e.g. large-cap stocks down 15% or
more from their 52-week high with positive revenue
growth and a dividend]. Run it, show me the top ten
with one line each on why they showed up, and add
the three you'd research first to a watchlist called
[NAME]. No trades.
```

TIP

Everything above works with the connector's read-only tools, which means it works even if you never fund the agentic account. The analysis alone is worth the setup.

The Other Ways To Connect

The same link works in every MCP-compatible tool. Robinhood lists these on the overview page. Same Agentic account, same rules, different front door.

Where	How
Claude (this guide)	Customize, then Connectors, then Add, then Add custom connector, paste the link.
Claude Code (terminal)	claude mcp add robinhood-trading --transport http https://agent.robinhood.com/mcp/trading (the --transport http part matters; without it Claude Code thinks it's a local command)
ChatGPT	Settings, then Security and login, turn on Developer Mode, then add the MCP link under plugins.
Codex (app)	Settings, then MCP servers, then Streamable HTTP, add the link.
Codex CLI	codex mcp add robinhood-trading --url https://agent.robinhood.com/mcp/trading
Cursor	Settings, then Cursor Settings, then Tools and MCPs, then Connect.
Grok	In a chat, the plus button, then Add connector, then Custom, add the link.

WHY CLAUDE FOR THIS

Two reasons I'd start here. Claude asks permission before running tools that change something, which is your second approval gate for free. And it builds artifacts, so the X-Ray and the Friday report are things you can open, not walls of text.

TIP

Claude Code is the one to use if you want the dip-buy rule running unattended on a schedule with full logs. Cowork's scheduled tasks are the easier version of the same thing.

The Guardrails That Make This Reasonable

Robinhood's own disclosure says agentic trading "involves significant risk, including the possible loss of your entire investment," that agents "can make errors, misinterpret instructions, act on incomplete or outdated information," and that you assume all of the risk. They're right. Here is how you use it anyway without getting hurt.

Guardrail	How
Fund it with money you could lose entirely	The transfer into the Agentic account is the only limit that can't be argued with. Make it small until you trust the setup.
Approval on every order, in two places	Your phrase in the prompt (PLACE THE ORDERS) and Claude's own tool permission. Allow once, never always.
Write the rules into every trading prompt	Per-trade cap, cash floor, once-per-day, ETFs unless you name a stock. An agent with no rules trades headlines.
Know the off switch	Customize, then Connectors, click the Robinhood card, remove it. Thirty seconds. Also: Robinhood sends a push notification per trade, leave those on.
Never paste your password into a chat	Sign-in only happens on robinhood.com in your browser. If anything asks for it in the chat, stop.
Market hours	Market orders only fill during regular hours. Ask for limit orders if you're trading at night, or you'll get "won't trade" and think it's broken.
Margin is off	Agentic accounts can't borrow yet. Cash accounts wait a day for sales to settle before that money buys again.
It's not advice	Claude is a very fast analyst with no license and no memory of your goals unless you tell it. You decide. Every time.

HEADS UP

Crypto through the agent isn't available in every state (New York included), needs a separate Robinhood Crypto account, and the agent can trade coins but never transfer, stake or lend them. Options need the level you're already approved for; the agent can't upgrade you.

Mistakes That Make It Dangerous

Mistake	Fix
Funding the Agentic account like it's your main one	Start with an amount you'd spend on a nice dinner. Add more after a month of watching it behave.
Clicking "always allow" on a place-order tool	Allow once, every time. That click is the whole safety model.
"Rebalance me" with no numbers	Give it the caps: max per stock, ETF share, cash floor. Otherwise it improvises something plausible.
Using GO as the approval word	Use a phrase you'd never type by accident.
Assuming a chat rule runs by itself	Chats don't run on a schedule. Use a scheduled task with the connector attached, or check manually.
Letting the login expire	When a scheduled run says "not signed in," reconnect that day, not next week.
Trusting the sector math blindly	Ask it which numbers came from the connector and which from public fund data. It'll tell you.
Trading on the first day	Run the X-Ray, the position explainer and the tax-lot check first. They're free and they teach you what the tool sees.

The one-page version

Step	Where	What
1	Robinhood overview page	Copy the MCP link at the bottom: agent.robinhood.com/mcp/trading
2	Claude, Customize, Connectors	Add, Add custom connector, name it, paste the link, Add, Connect
3	robinhood.com (desktop browser)	Sign in, approve, open the Agentic account, transfer in a small amount
4	New chat, tools menu	Turn Robinhood Trading on. Paste prompt 1. Read the X-Ray.
5	Same chat	Prompt 2 with your targets. Read the reviewed orders. Type PLACE THE ORDERS. Allow once.
6	Scheduled task	Prompt 3 (rule) and 4 (Friday report) with the connector attached.

DO THIS TODAY

Open the Robinhood Agentic Trading page, copy the link, add it in Claude under Customize and Connectors, sign in on robinhood.com, and run the X-Ray before you fund anything. You'll learn more about your portfolio in ten minutes than you have in a year.

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Let it analyze everything. Let it trade a little. Approve every click.