MCP SERVER | NO CODE | CLOUD HOSTED

IBKR (Interactive Brokers) MCP

Execute trades & monitor brokerage accounts.

IBKR (Interactive Brokers) gives your AI agent direct access to manage your brokerage account. You can execute trades, modify open orders, and cancel positions instantly through natural conversation. It also fetches real-time market snapshots for specific contracts, tracks portfolio balances by currency, and generates deep financial reports using pre-configured Flex Queries.

A+ Quality Score 100/100

trading | brokerage | portfolio-management | market-data | investing | financial-api

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vinkius.com/mcp/ibkr-interactive-brokers

SCAN TO VIEW

The infrastructure that powers AI agents in the real world.

Vinkius connects AI to the world's software through secure, enterprise-grade infrastructure — enabling real-world execution at scale, built on the Model Context Protocol (MCP).

Your AI Connections Run Through Vinkius Cloud

The world's largest managed MCP catalog

Vinkius is the cloud infrastructure where AI agents connect to the software your business already runs. We handle the hosting, the security, the credentials, the uptime — you get agents that actually do things.

We operate the world's largest managed MCP catalog. Major SaaS platforms, CRMs, databases, and cloud providers — running, monitored, production-ready. This MCP server is hosted and maintained by the Vinkius Cloud for AI Agents.

> *The agent doesn't manage credentials, doesn't manage uptime, doesn't manage security. Vinkius does.*
>
> — Architecture principle

Four Pillars of the Vinkius Runtime

01 — Security by design

Credentials stay encrypted at rest via AES-256. The AI agent never touches raw keys — they're injected into a sandboxed V8 isolate at runtime. Actions are logged, and connections have an emergency kill switch.

02 — Built on MCP Fusion

This MCP server was built with **MCP Fusion**, the open-source framework (Apache 2.0) that powers the entire Vinkius catalog. Schema-as-firewall strips undeclared fields, compiled PII redaction runs at zero overhead, and cryptographic lockfiles produce git-diffable audit trails.

03 — Deterministic observability

Eight immutable metrics per endpoint: request volume, p95 latency, error rate, active connections, cost attribution. A live payload feed logs every tool call with mutation detection.

04 — Autonomous operations

Servers are deployed, monitored, and patched autonomously. New capabilities and security patches ship weekly. Zero-downtime deployments ensure continuous availability across all managed MCP servers.

AES-256	Ed25519	24h TTL	V8 Isolate
Encryption at rest	PKI vault signatures	Ephemeral session keys	Sandboxed execution

One Token. Instant Access.

Every MCP server on Vinkius is accessed through a **Connection Token**. Tokens are generated in the cloud dashboard and produce a unique MCP endpoint URL. Paste this URL into any MCP-compatible client — no SDK required.

A single token can serve **multiple AI clients simultaneously**, or you can issue separate tokens per client for granular access control. Each token tracks its own request count, last activity timestamp, and can be individually enabled or revoked.

MCP ENDPOINT

```
https://edge.vinkius.com/{token}/mcp
```

Claude · Cursor · VS Code · Windsurf · Grok · Gemini

Security Is the Architecture

Security in Vinkius is not a feature — it's the foundation of the runtime. The gateway enforces multiple independent protection layers between AI agents and third-party APIs.

01 — Ed25519 PKI Vault

Every workspace has an Ed25519 Master Key. Session keys are generated ephemerally (24h TTL) and signed by the Master Key. Credentials never leave the vault boundary.

02 — V8 Isolate Sandboxing

Tool code runs inside isolated-vm V8 isolates with 64 MB memory caps and per-request timeouts. No filesystem access, no network access except through the SSRF-guarded fetch bridge.

03 — SSRF Guard

All outbound HTTP requests are DNS-resolved and validated before execution. Private IP ranges (10.x, 172.16-31.x, 192.168.x, AWS metadata 169.254.x) are blocked at the network layer.

04 — DLP & PII Redaction

A ResponseGuard pipeline intercepts every tool response. Configurable redaction patterns strip sensitive fields (emails, SSNs, card numbers) before data reaches the AI agent.

05 — Cryptographic Audit Trail

Every request is signed into a SHA-256 hash chain with Ed25519 signatures. Events form a tamper-proof, SIEM-exportable forensic record.

06 — Honeytoken Trap System

Phantom credentials are injected into isolated environments. If a honeytoken is used outside Vinkius infrastructure, the server is quarantined instantly.

Emergency Kill Switch

EU AI Act Art. 14(1) Compliant

The kill switch is an **emergency halt** mechanism — not a simple toggle. When triggered, it executes three actions atomically:

01 — Server deactivated

The MCP server is immediately taken offline across the entire cluster.

02 — All tokens revoked

Every connection token is invalidated. Total lockout — reconnection blocked until new tokens are issued.

03 — WebSocket connections killed

Active connections terminated via Redis pubsub broadcast. Propagates to every runtime node in the cluster.

Full Visibility. Zero Guesswork.

The Vinkius cloud dashboard includes a full MCP Governance suite — real-time analytics and security controls for production AI operations.

Control Plane

KPI dashboard with request volume, latency, success rate, token consumption, and AI-generated operational briefings.

Agent Activity

Which AI clients are connecting, how often, and what they're doing — real-time session tracking.

FinOps

Cost tracking per tool, payload compression savings, budget optimization signals, and consumption trends.

Tool Health

Slowest and most error-prone tools, with actionable root-cause insights and performance baselines.

Firewall & DLP

PII redaction activity, sensitive data protection counters, and security event timeline.

Incident Log

Error trends, failure rates, status-code breakdowns, and forensic audit trail access.

> Get started at **cloud.vinkius.com** — connect your AI agent in under 60 seconds.

IBKR (Interactive Brokers) MCP

9 tools available
Cloud-hosted on Vinkius

Connect your Interactive Brokers account via this MCP to automate the tedious parts of trading and finance management. Instead of logging into several separate web portals just to check a balance or submit an order modification, your agent handles it all. You can use natural language commands to place new orders, modify existing ones, or cancel anything instantly. Need to know what's happening right now? Fetch real-time snapshots for specific contracts to inform your decisions before you trade. The system also keeps track of your entire financial picture, letting you monitor cash balances and view comprehensive account summaries. If deep analysis is required, the agent can generate Flex Query reports that pull together complex data points for auditing or reporting. All this functionality lives under one roof on Vinkius, meaning you connect once from any compatible client and get immediate access to your entire brokerage workflow.

Core Capabilities

01 — Manage Trades

Place new orders, modify existing ones, or cancel positions using natural language commands.

02 — Check Account Status

Retrieve the current account summary, including total cash balances and margin metrics for immediate financial oversight.

03 — Fetch Market Data

Get real-time price snapshots for specific contracts to base trading decisions on live data.

04 — Generate Reports

Programmatically request and retrieve deep financial analysis using pre-configured Flex Query reports.

05 — Monitor Ledgers

View detailed portfolio ledgers to track every transaction against your account history.

One Click on Vinkius — From Prompt to Execution

Available at **vinkius.com/mcp/ibkr-interactive-brokers** — connect your AI agent in three steps.

01 Subscribe to this MCP and provide your IBKR Client Portal API URL, along with any required Flex Web Service Token.

02 Your AI client uses the credentials to maintain an active connection session with the brokerage portal.

03 You simply tell your agent what you need—like 'Get the market data for AAPL' or 'Cancel order 1001'—and it executes the action.

The bottom line is that your AI client talks directly to your broker account, executing complex financial tasks without you touching a single dashboard.

Built For

This MCP is for professional traders and quantitative analysts who spend too much time switching between multiple web interfaces just to execute a strategy or run a report. If your job involves tracking assets across different currencies and needing real-time data feeds, this is built for you.

Day Trader

Executes rapid buy/sell cycles by placing new orders or modifying open positions without switching tabs.

Financial Analyst

Automates the retrieval of historical portfolio ledgers and generates deep Flex Query reports for quarterly compliance checks.

Portfolio Manager

Monitors cash balances across multiple currencies and reviews comprehensive account summaries to manage risk exposure.

What Changes When You Connect

01 Never switch between tabs again. Instead of manually navigating to place an order, you tell your agent to 'place a limit sell on XYZ,' and the `place_order` tool handles the entire execution.

02 Get instant visibility into your funds by using `get_account_summary`. You immediately know your net liquidation value and total cash balance without checking multiple statements.

03 Need deep financial auditing? Instead of downloading massive data files, use `send_flex_request` to build a report reference code, then pull the results with `get_flex_statement` for focused analysis.

04 Stay informed on live price changes. The `get_market_data_snapshot` tool gives you immediate pricing intelligence on specific contracts before you commit to a trade.

05 Keep your work flowing without interruption. The built-in session maintenance tools ensure that your connection remains active so your agent can execute complex workflows consistently.

Real-World Applications

Quickly reacting to market dips

A day trader sees a dip and needs to act fast. Instead of checking the manual, they tell their agent: 'Check the current snapshot for AAPL' (`get_market_data_snapshot`), then immediately follow up with 'Place a market buy order for 100 shares' (`place_order`). The whole sequence happens in seconds.

Preparing end-of-quarter compliance reports

A financial analyst needs to audit the last quarter's performance. They tell their agent: 'Generate a Flex Query report for Q2' (`send_flex_request`), wait for the reference, and then retrieve the finalized data using `get_flex_statement`.

Adjusting an open trade due to news

A portfolio manager spots unexpected volatility. They ask their agent to 'Modify order ID 500,' changing the limit price from $180 to $175 using `modify_order`, preventing a bad execution.

Investigating an unusual transaction

An account holder notices a discrepancy. They ask their agent to 'Show me the detailed ledger for last week,' using `get_portfolio_ledger` to pinpoint exactly when and why the funds moved.

Patterns to Avoid

Using market APIs for general research

✗ AVOID

Trying to use this MCP to build a theoretical pricing model or predict future trends based on simple historical data points.

✓ INSTEAD

This MCP is built for direct account actions. Use `get_market_data_snapshot` for current prices, but if you need predictive modeling, look at dedicated quantitative analysis tools instead.

Ignoring session time limits

✗ AVOID

Running a long series of trades and having the connection fail halfway through because the API session timed out.

✓ INSTEAD

Always use the `tickle_session` tool in your workflow to keep the API connection active. This prevents frustrating failures mid-task.

Trying to place multiple types of orders at once

✗ AVOID

Telling the agent, 'Place 50 shares of stock and also modify my bond trade' in a single non-structured prompt.

✓ INSTEAD

Break complex actions into distinct steps. First, use `place_order` for the stocks, then call `modify_order` separately with the specific details for the bonds.

The Right Fit

Use this MCP if your workflow requires direct interaction with a live brokerage account—placing trades, checking real-time balances, or generating auditable financial statements. It's essential when you need to act on money right now. Don't use it if you are merely doing general market research (use dedicated data providers for that) or if your goal is purely academic modeling without connection to a live account. If your task involves deep Python development and state management, you might prefer an agent framework like LangChain;

but when the requirement is 'I need my money moved,' this MCP is the direct path.

Tracking Brokerage Activity Used to Be a Manual Nightmare

Before having this MCP, tracking your account meant jumping between three or four different websites. You'd log in to check if you had enough cash for a trade, then switch over to view the current market price, and finally click through complex menus just to submit an order modification. It was slow, error-prone, and exhausting.

Now, your agent handles that entire sequence naturally. You ask it to 'Place a new limit order,' and it manages the balance check, the real-time data pull, and the submission—all within one conversation. The result is speed without sacrifice.

IBKR (Interactive Brokers) MCP Gives Instant Order Execution

The most tedious part was often the sequence of getting an order placed, and then needing to immediately change it. You'd submit `place_order`, realize a price point was wrong five minutes later, and have to manually find that open order ID just to use the modify button.

Now, you tell your agent what needs fixing. It uses `modify_order` instantly. The entire process is contained; you don't leave the chat window until the status is confirmed.

IBKR (Interactive Brokers) - 9 Tools

These tools let you manage specific actions within your brokerage account, including placing trades, checking balances, and generating required financial documentation.

#	TOOL	DESCRIPTION
01	`get_account_summary`	Retrieves the current status of your brokerage account, including equity values and cash balances.
02	`cancel_order`	Sends a request to cancel an existing order ID on your account.
03	`get_flex_statement`	Pulls and retrieves a specific, pre-generated financial report (Flex Query).
04	`get_market_data_snapshot`	Fetches the current trading price data for a specified contract.
05	`modify_order`	Changes parameters of an existing, open order, like adjusting quantity or price.
06	`place_order`	Submits a brand new trade order based on the defined specifications.
07	`get_portfolio_ledger`	Retrieves a comprehensive list of all transactions and balances for your account history.
08	`send_flex_request`	Initiates the process to generate a complex financial report, providing a reference code.
09	`tickle_session`	Keeps your API connection active and prevents session timeouts while working with your account.

See It in Action

Real prompts you can use once this MCP is connected to your AI agent through Vinkius Cloud.

U Get a market data snapshot for ConId 265598.

I've retrieved the market data for ConId 265598 (AAPL). The last price is $185.92 with a daily change of +1.2%.

U Show me the account summary for account U1234567.

For account U1234567, your Net Liquidation Value is $50,230.45, with a Total Cash Balance of $12,400.10 and Maintenance Margin of $15,000.00.

U Cancel order 1001 for account U1234567.

I have successfully sent a cancellation request for order ID 1001 on account U1234567. The status is now 'Cancelled'.

Frequently Asked Questions

01 **Can I use IBKR (Interactive Brokers) MCP to get historical data?**

No, this MCP focuses on real-time and generated reports. While you can pull detailed portfolio ledgers with `get_portfolio_ledger`, it doesn't function as a historical archive search tool.

02 **What is the difference between placing an order and modifying one using IBKR (Interactive Brokers) MCP?**

Placing an order uses `place_order` to submit something brand new. Modifying an order requires you to use `modify_order` and specify an existing, open order ID.

03 **Do I need a special token for IBKR (Interactive Brokers) MCP?**

Yes, depending on your account setup, the process may require an optional Flex Web Service Token to generate advanced reports via `send_flex_request`.

04 **How do I check my current cash balance with IBKR (Interactive Brokers) MCP?**

You simply ask your agent to retrieve the account summary. The `get_account_summary` tool provides an immediate overview of all available funds and margin metrics.

05 **Does this MCP support multiple currencies for tracking?**

Yes, the system is designed to monitor cash balances by currency, giving you a comprehensive view of your total assets across different denominations.

Go Live in 60 Seconds

Get your connection token from **cloud.vinkius.com**, then paste the endpoint URL into any MCP-compatible client.

YOUR MCP ENDPOINT

```
https://edge.vinkius.com/[TOKEN]/mcp
```

CLIENT	WHERE TO CONFIGURE
Claude AI	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
Cursor	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
VS Code	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add `"ibkr-interactive-brokers": { "url": "…" }`
Windsurf	MCP Settings → `mcp_settings.json` → Add endpoint URL
ChatGPT	Settings → Tools & plugins → Add MCP server → Paste endpoint
Gemini	Extensions → Add MCP Server → Paste endpoint URL

ASK AN AI ABOUT THIS

Let your preferred AI explain this MCP server

- Ask ChatGPT
- Ask Claude
- Ask Perplexity
- Ask Gemini
- Ask Grok

READY TO CONNECT

IBKR (Interactive Brokers) is live on Vinkius Cloud.

Get your connection token, paste it into your AI agent, and start building. No SDK. No deployment. Just results.

Start at cloud.vinkius.com →

vinkius.com · support@vinkius.com

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