

Zoltar Financial Value Proposition

Stock Market is the perfect imperfect mechanism to apply
Machine Learning, Statistical and Optimization methods to...



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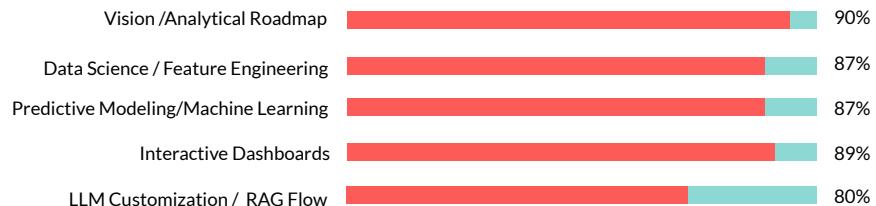
Team



CEO

About Me

For over 20 years, my passion has been to use Computational Math and Statistics to uncover knowledge about cause-effect relationships and use derived solutions to capitalize on this knowledge. When passion meets expertise, magic happens!



Overview

We created a **self-service platform** that educates users on current stock market trends and predictions to let users form **better trading decisions** through access to our proprietary Zoltar Ranks combined with hyper-specialized AI assistant.

We developed a Retrieval Augmented Flow (**RAG**) to empower an uber-helpful **Zoltar Chat Assistant** with up-to-date and timely knowledge; and gave it the ability to provide guidance to users on methodology and use of Zoltar Ranks to generate returns from the market.

We achieve **outstanding prediction results** through systemic and streamlined production of **Zoltar Ranks** that challenge the traditional technical and momentum trading with advanced data science and analytical techniques.

We created a well **documented, recurring, self-monitoring RPA processes** for data cleansing and transformation, feature engineering, machine learning and optimization, designed to generate 92 Machine Learning models and over 500 time series sub-models that are translated into Zoltar Ranks.



Problems to solve

1

Today's retail traders have easy access to free trading tools, but many lack expertise in portfolio selection and management, with decisions often driven by speculation and social media, often leading to losses.

2

Wealthier portfolios get professional paid help, but many traders with under \$10k rely on themselves. Choosing a resource requires trust, which takes a long time to build and maintain, especially if money is involved.

3

Many trading simulation platforms aim to enhance traditional technical trading experience, but lack sophisticated quantitative analysis to assist in stock selection, which complicates the use, limits target audience, and may reduce the accuracy and timeliness of predictions

4

Many novice and expert traders alike can attest to the time and effort needed to perform quantitative analysis and research on equities; hence shortcuts are made to extrapolate the near future expected price paths and a reliance on others' research.



Mission Statement

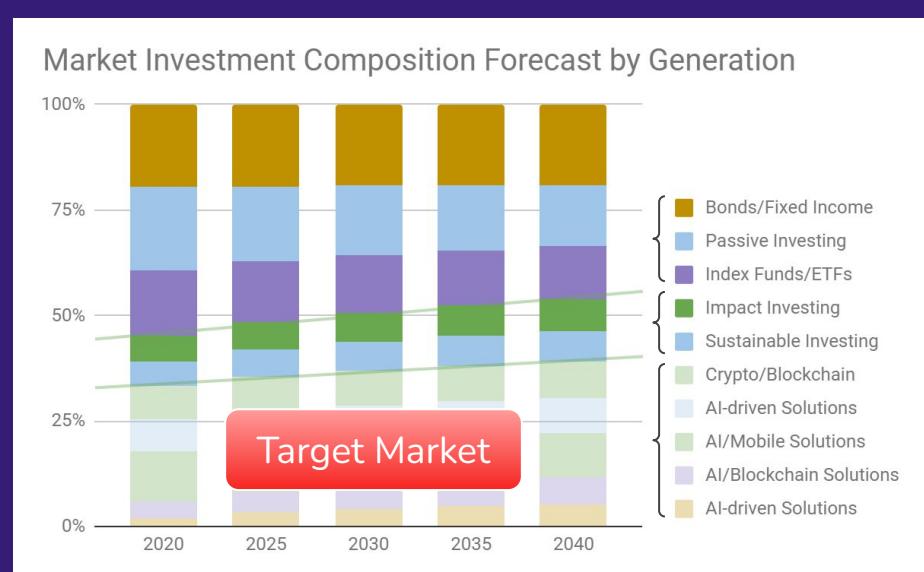
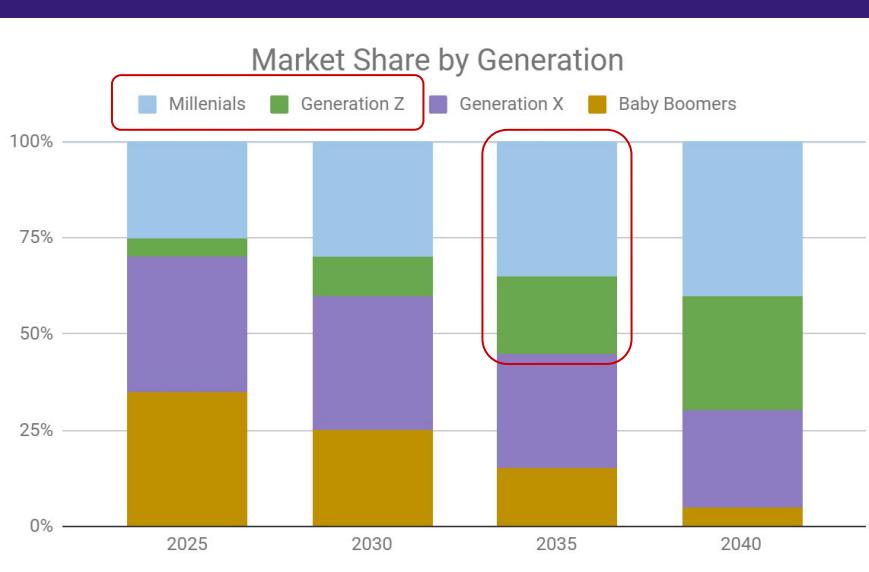
We strive to have our platform users form trading strategies that are uniquely theirs. Our mission is to ensure they consistently outperform S&P 500.

We use the power of advanced analytics to derive Zoltar Ranks, that together with strategy levers, simulation engine and the uber-helpful Zoltar Chat assistant, make it possible.



Trend analysis

The number of trading platforms that claim AI / automated / robotic trading has grown significantly in the recent 3 years, with more room to grow as the young generation becomes more prevalent investor group by 2035





**"Any sufficiently advanced
technology is indistinguishable
from magic."**

Arthur C. Clarke



Market Analysis

01

The breadth of available software platforms exist today that game-ify the trading experience, which helped trading gain popularity during COVID-19 pandemic

The advances in software (LLM) and hardware(GPUs) accelerate progress

Many new applications on the market today take advantage of AI hype to advertise “Robotic” trading assistance. Many provide technical triggers and simulations. Larger corporations have teams but move slow, so the smaller newcomers have more advanced tools.

AI-Powered Best Stocks Strategy

Danelfin AI Best Stocks S&P 500

4%-8% MONTHLY RETURNS WITH THIS ALGORITHMIC TRADING BOT

\$20K to Invest? Start Here. See how this Quant Trading Bot hits a 71-250% win rate. For real investors with 20K liquid.

Sponsored by NURP

Quantbase

Data-Driven Investing

Invest with our SEC-registered robo-advisor in cutting edge quantitative portfolios and strategies to supercharge your long-term capital growth

Get started

Stop Trading in the Past. Start Trading in the Future.

Unleash Your Full Trading Potential With Our Advanced Algorithms, Insights, And Support.

Quantbase Portfolio: \$14,970.41

Flagship funds: Our premier and highest performing funds.

Quantbase Crisis Flagship

Ann. Return: 24.28% Risk Score: 4

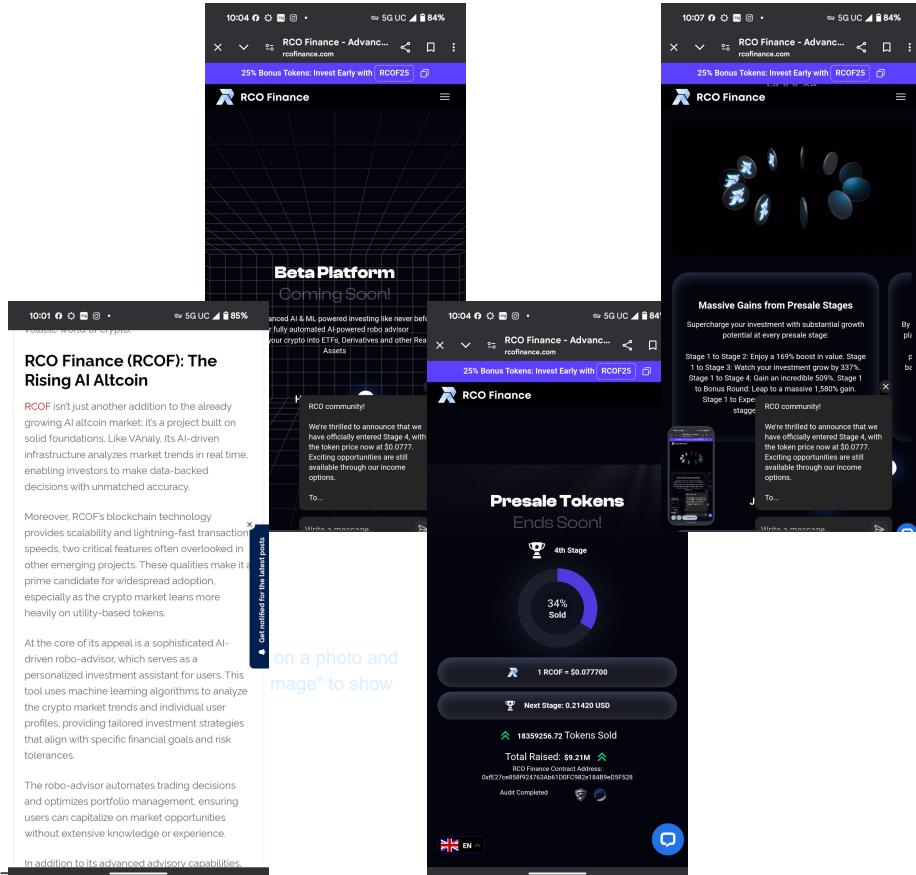
Market Analysis

02

The closest competition comes from RCOF in Crypto space, with working models of Machine Learning integrated into robo-advising system. They also have a promising build-out for Front-end token distribution and a similar technical ‘feel’.

RCOF Finance offers a Stage approach to token ownership in pre-sale, already surpassing \$400MM in market cap.

This is an example of what Zoltar Financial (ZF token) may look like in the future, with similar progression within the Equities market.





Market analysis

03

Tools available today show that technology can be successfully integrated to develop robust automated trading solutions.

The AI assisted trading market is still in the early stages

The young generation of investors have shown to be more open to technological solutions that can give them an advantage in the market.

Most young traders rely on social media for sentiment aspect of the trading. The technical aspects are not as easily attained and that's where these tools can help.





Target audience

We serve the Retail and B2B markets. Our retail app is aimed at the underserved - those with very limited trading experience, but Zoltar Ranks have a broader appeal to seasoned traders and Hedge Funds hungry for latest industry predictive solutions to achieve the 'edge'.

- 01 | Millennials and Generation Z
- 02 | No prior trading experience required
- 03 | Prioritize self-service and independence for a unique experience
- 04 | Research-minded individuals that embrace science
- 05 | Value real-time AI curation availability throughout the app





Proposed solution

Empower Zoltar Assistant with knowledge to educate users on how to find undervalued commodities on the platform to generate profits, regardless of their skill level



Process



Data and Features

- API to Exchange for quotes/volumes
- Feature engineering / transformations

Daily Model Build/Zoltar Ranks

- Overnight scoring on daily data
- Documentation for records/transparency



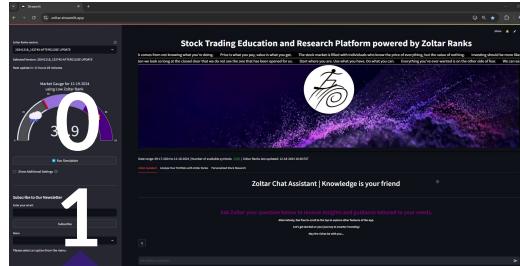
Live Scoring/App Update

- API to exchange for quotes/volumes
- Full Scoring with selected model (triage)





Zoltar Community Retail App Features

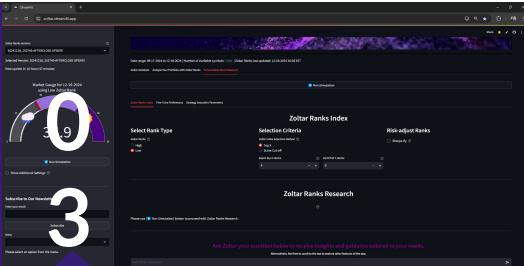
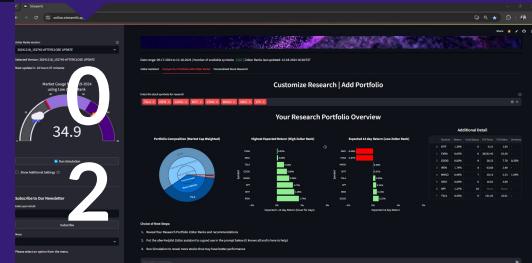


Zoltar Chat Assistant

RAG Flow empowered with all recent stock trends through now, capable of educating users with reliable information, and also seamlessly available throughout the app

Research Your Portfolio

Ask Zoltar for perspective stocks and enter them into your portfolio for further research, or enter your own symbols; then ask Zoltar to analyze your portfolio and make recommendations



Personalized Stock Research

Enter strategy levers and run simulations to see impact on Alpha; then further filter and fine-tune the chosen Zoltar Ranks with interactive plots and share results (including your Zoltar chat)



Results

Viewing production results on the platform is one thing, but proving to the market that the platform is capable of gains that outperform S&P 500 is best done with live trading over a long timeframe. We have done just that with a non-trader using the platform to generate returns that far outpace the market. The longer timeframe for the comparison will be available as time passes.

Starting Capital

xxK

We used our own funds to test
and fine-tune methodologies

3-month Capital

xxK

xx% return, with forecasted
xx% annualized return

Average Annualized Alpha

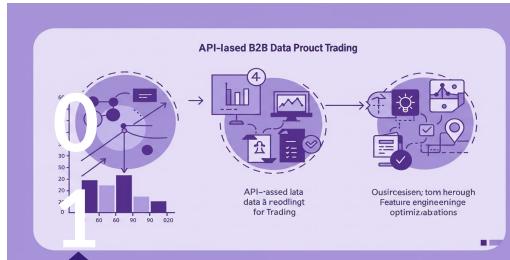
+150-450%

Over the same time period,
S&P 500 generated xx% or
projected xx% annualized



B2B Solution: Zoltar Ranks API

COMING
SOON

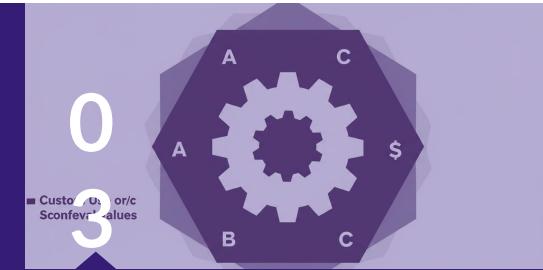


API data stream integration

Data stream incorporates easy to use Flags/Triggers for automated portfolio allocation management

Analytical Retro Services

Zoltar Financial provides analytical services to help with assessment of incremental value for the business from integrated solution.

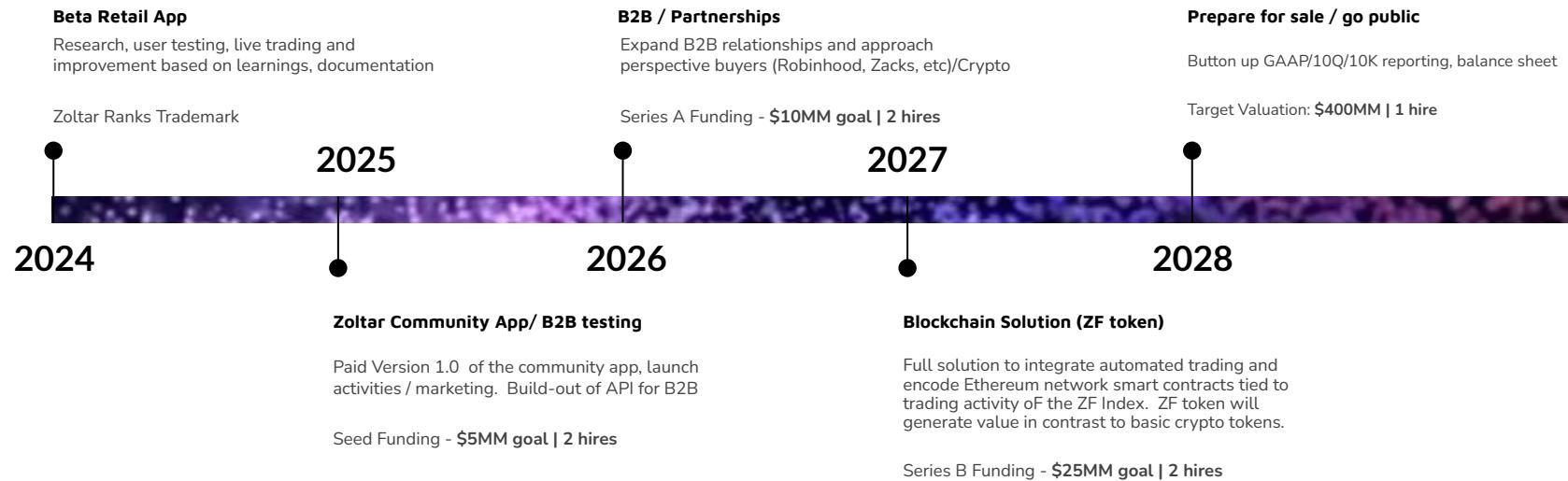


Customized Zoltar Rank API

While High and Low Zoltar Ranks are available today, the strategies that businesses deploy may require a more unique use of the available prediction field.



Vision





Pricing

Zoltar Community Retail App

\$2.99/mo

Users will have the option to buy the app outright after 3 months of use (\$100)

We are building three unique products/revenue streams. The Retail App is the most affordable option to start using Zoltar Ranks and targets non-traders and retail traders. Our more advanced API solution is aimed at businesses/traders with more sophisticated capabilities. Financial Blockchain solution requires further assessment and planning to optimize path to profit.

Zoltar Ranks B2B Sales

\$100/mo

Hedge Funds and other institutions can purchase API use to integrate Zoltar Ranks into existing strategies

Financial Blockchain (ZF token)

?

With proper SME support we will design a smart contract to spearhead the technology for novel use of Zoltar Ranks



We are Building a Team

Our passion for making money is what unites us, our skills make it possible. We win together!

In search of the team we seek passionate individuals with high degree of ownership and a 'can-do' attitude. The sum of our individual achievements pales in comparison to what we can build together.

Each person on the team is eager to contribute to the final solution as large part of our incentives are tied to the company performance.

Positions Opening Soon

- Web/mobile/desktop front-end dev
- Product Designer
- Web3/Solidity dev



Thank you.

<https://zoltarfinancial.com>



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