

# FORTUNA

AN AI INVESTMENT PLATFORM



## MISSION STATEMENT

Fortuna is driven by a singular mission: Reshape the investment landscape for retail investors using AI and social sentiment to foster inclusive investing.

## PROBLEM STATEMENT

GenZ and Millennial retail traders are overwhelmed by market noise, leading to reliance on meme stocks and unclear trends. Absence of Gen AI forecast tools hamper guided investment decisions.

\$1.5 B

is poured into the stock market Daily by retail investors

61%

consider social media for investment advice

51%

feel existing platforms don't cater investment advice to retail investors

# TEAM



**Sanjana Raj**

CEO + FOUNDER

EX-PLAYSTATION; SOFTWARE DEV  
MASTERS IN COMPUTER SCIENCE(AI)



**Insia Fatima**

BOARD ADVISOR

FRACTIONAL PRODUCT LEADER  
FORMER VP OF PRODUCT(FINANCIAL SERVICES)

## IMMEDIATE PIPELINE HIRES



TECHNICAL LEAD  
FULL STACK + AI EXP



MARKETING LEAD  
SALES AND MARKETING EXP

## TRACTION

+290% MoM

SITE VISTS

+1340% MoM

WAITLIST CONVERSION RATE

80

EARLY USER INTERVIEWS

Q2 2024 Product Award Nominee for  
Products that Count (Fintech category)

## MARKET OPPORTUNITY

### Market Size

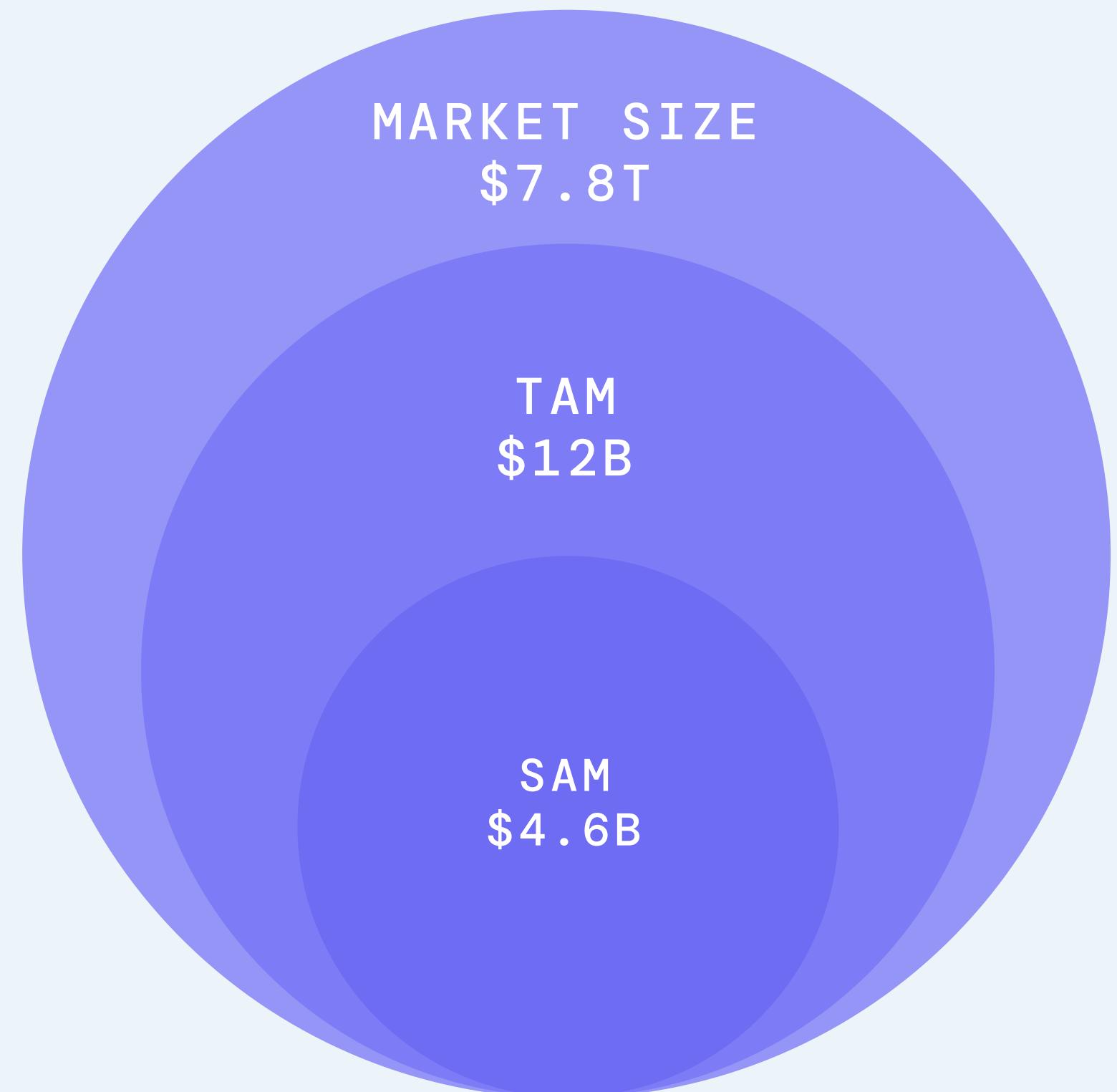
As of Q3 2024, the individual investor market size is \$7.8 Trillion.

### Total Addressable Market (TAM)

Over 100 Million retail investors in the US contributing to 25% of the total investor trading volume in the market.

### Serviceable Addressable Market (SAM)

Gen Z and Millennials constitute 38% of the retail investors market as of Oct 2024.



## SOLUTION

Fortuna is an investment platform that uses GenAI for copilot investing with social sentiment, creating custom ETFs and for mirroring real-time profitable trades boosting retail investors' returns and fostering Wall Street transparency.



### Market Forecast

Fortuna leverages different social media data to transform them into actionable insights and creates custom ETFs



### Fintech Social Media

Fortuna also acts as a unique social media platform solely for fintech enthusiasts and investors.



### Portfolio Comparison

Compare your friends' portfolio (with asset value masking) and Finfluencer's real time trades to mirror and grow your assets.

## WHY NOW?

In the wake of the GameStop phenomenon, a paradigm shift was witnessed with Reddit retail investors disrupting Wall Street.

Despite the growing interest in AI among retail traders, a significant

**49.5% want to learn how to integrate AI into their research.**

Now, seizing the opportune moment, we're harnessing AI and social media to invest better.

## TARGET AUDIENCE

Retail investors

Age: Gen Z and Millennials  
(20-36 yrs)

Location: United States

# Generative AI prompts for jargon free investing.

Get earnings, historical data summarized with just a simple question!

## FEATURE ONE

The image shows two side-by-side mobile phone screens. The left screen displays a stock price chart for 'META' with a purple line showing price movement from approximately 482 to 484. Below the chart are two summary boxes: one for '484.03 USD +10.75 (2.27%) today' and another for '484.03 USD +10.75 (2.27%) today'. A section titled 'AI RECOMMEND' shows a bar chart with a downward arrow labeled 'DOWN'. The right screen shows a navigation bar with 'Analysing META' and a back arrow. It contains a text input field with the placeholder 'Summarise the company outlook as presented in the Q3 earnings report for META'. Below this is a detailed breakdown of Meta's P&L statement for Q3, presented in a table:

Category	Amount (in millions)
Total Revenue	X,XXX
Cost of Goods Sold (COGS)	-X,XXX
Gross Profit	X,XXX
Operating Expenses	-X,XXX
Operating Income	X,XXX
Interest and Other Income/Expenses	-XXX
Pre-Tax Income	X,XXX
Income Taxes	-XXX
Net Income	X,XXX

At the bottom of the right screen is a text input field with the placeholder 'Enter your prompt here' and a blue send arrow icon.

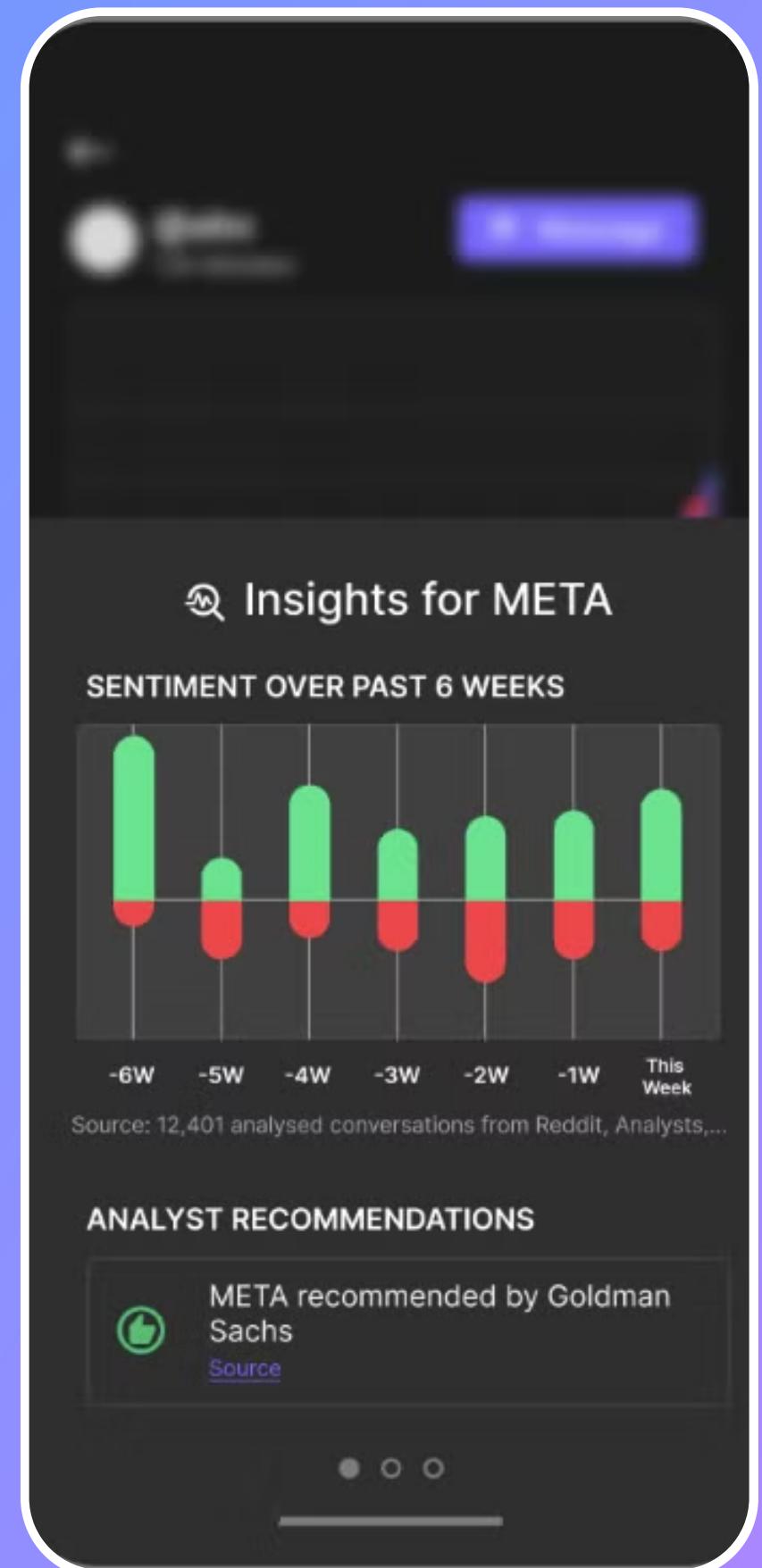
## FEATURE TWO

### Public sentiment trackers

News; Social Media: Reddit, Twitter, Discord; Newsletters;

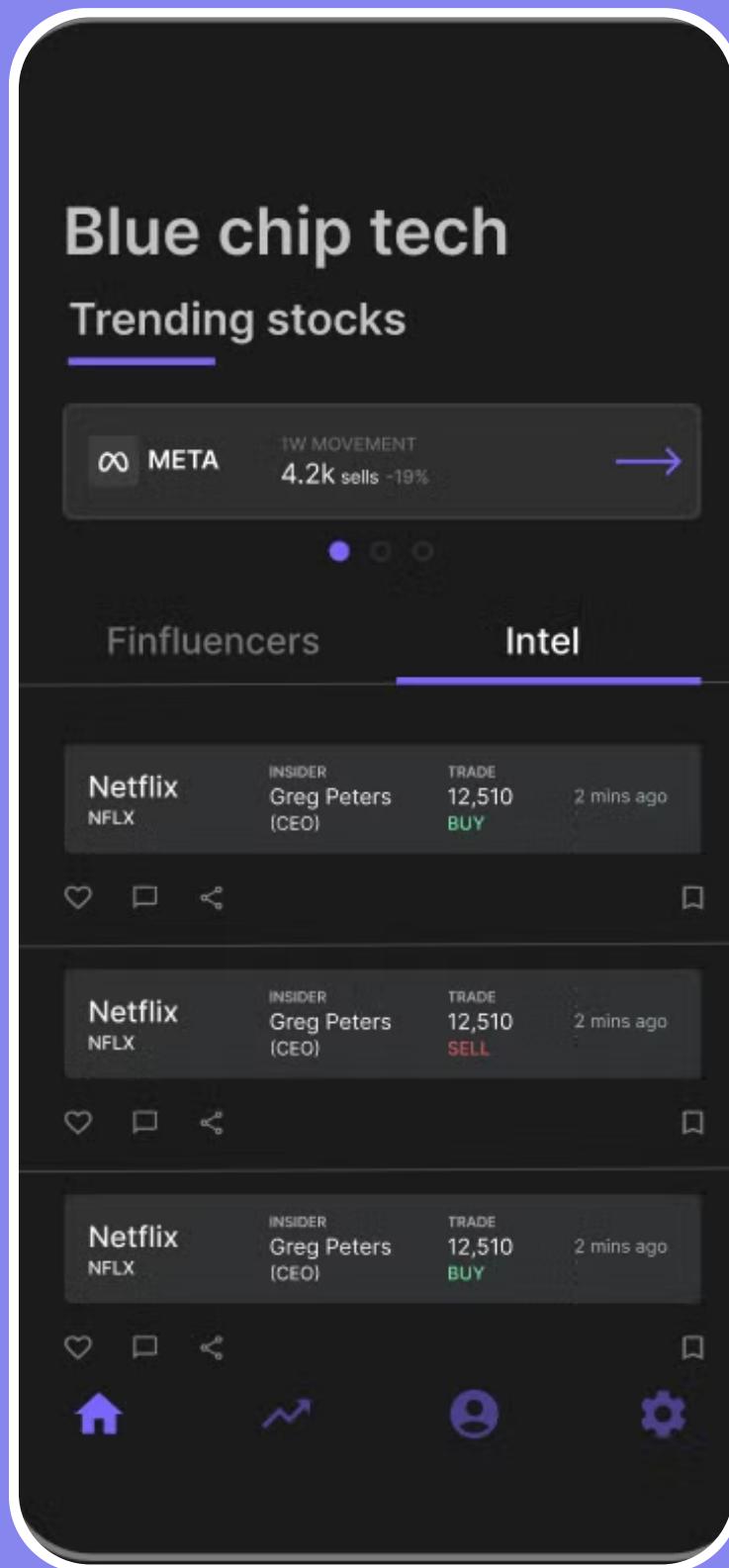
Analyst Reviews;

All sources transformed into actionable insights!



## FEATURES THREE AND FOUR

### Insights



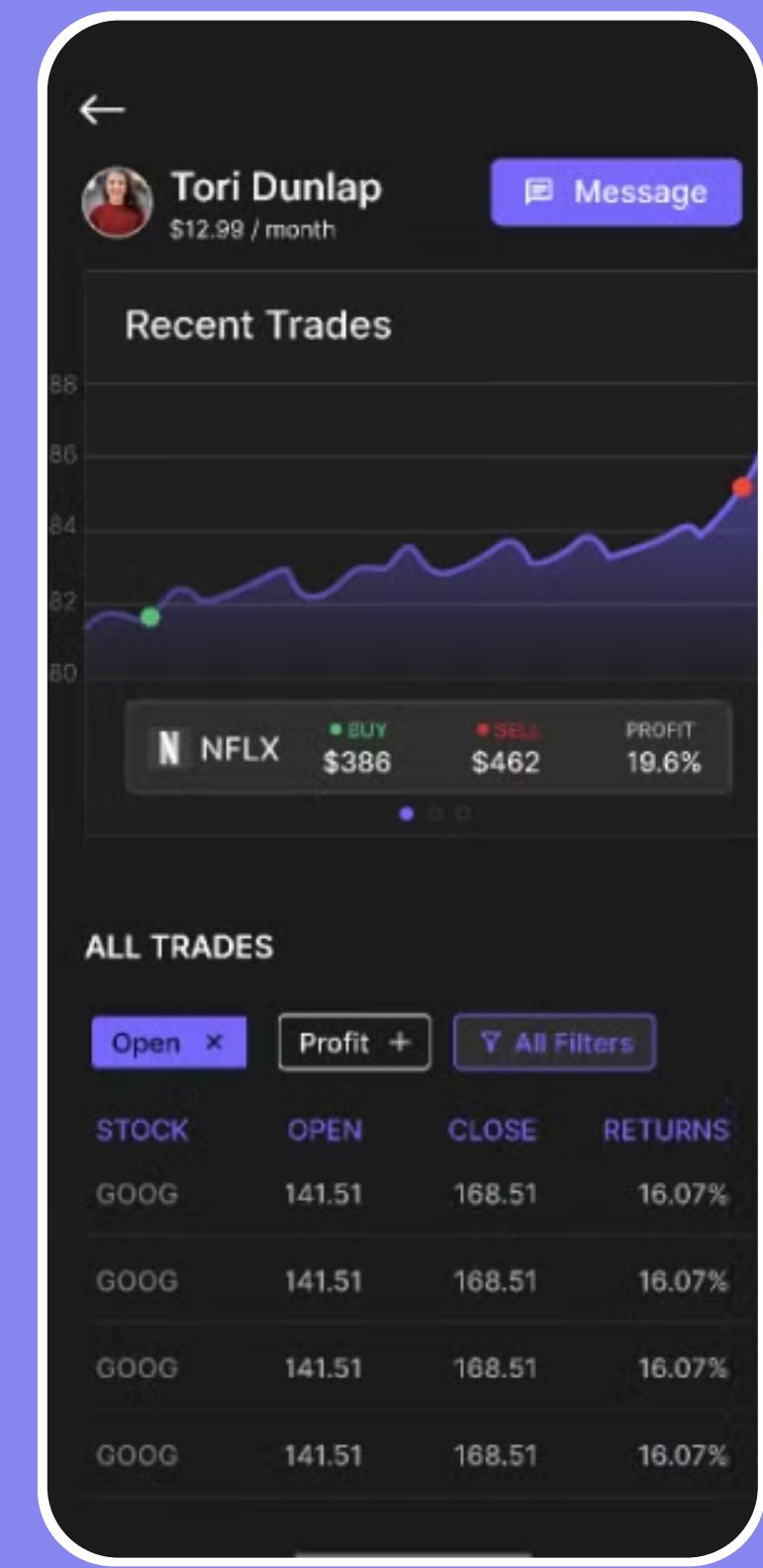
Market Movers

Try Pitch

### Portfolio tracking



Social Feed



Mirror real-time finfluencer trades

# GO-TO-MARKET

## SOCIAL CHANNELS



## UNIVERSITY AFFILIATIONS



*UCI, CSUF, CSULB, UCSD campaigns  
in Q4*

## INFLUENCER MARKETING



*@rahulrai, @yourrichbff, and others*

## REFERRALS AND GIVEAWAYS



*Refer 5 friends for lifetime free  
access to Finfluencer trades*



*Get 1 free month upon signup*

# BUSINESS MODEL

## SUBSCRIPTION MODEL

**\$9.99/MO**

- AI Driven Market Forecast
- Gen AI Insights
- Robinhood Integration

**Custom Pricing**

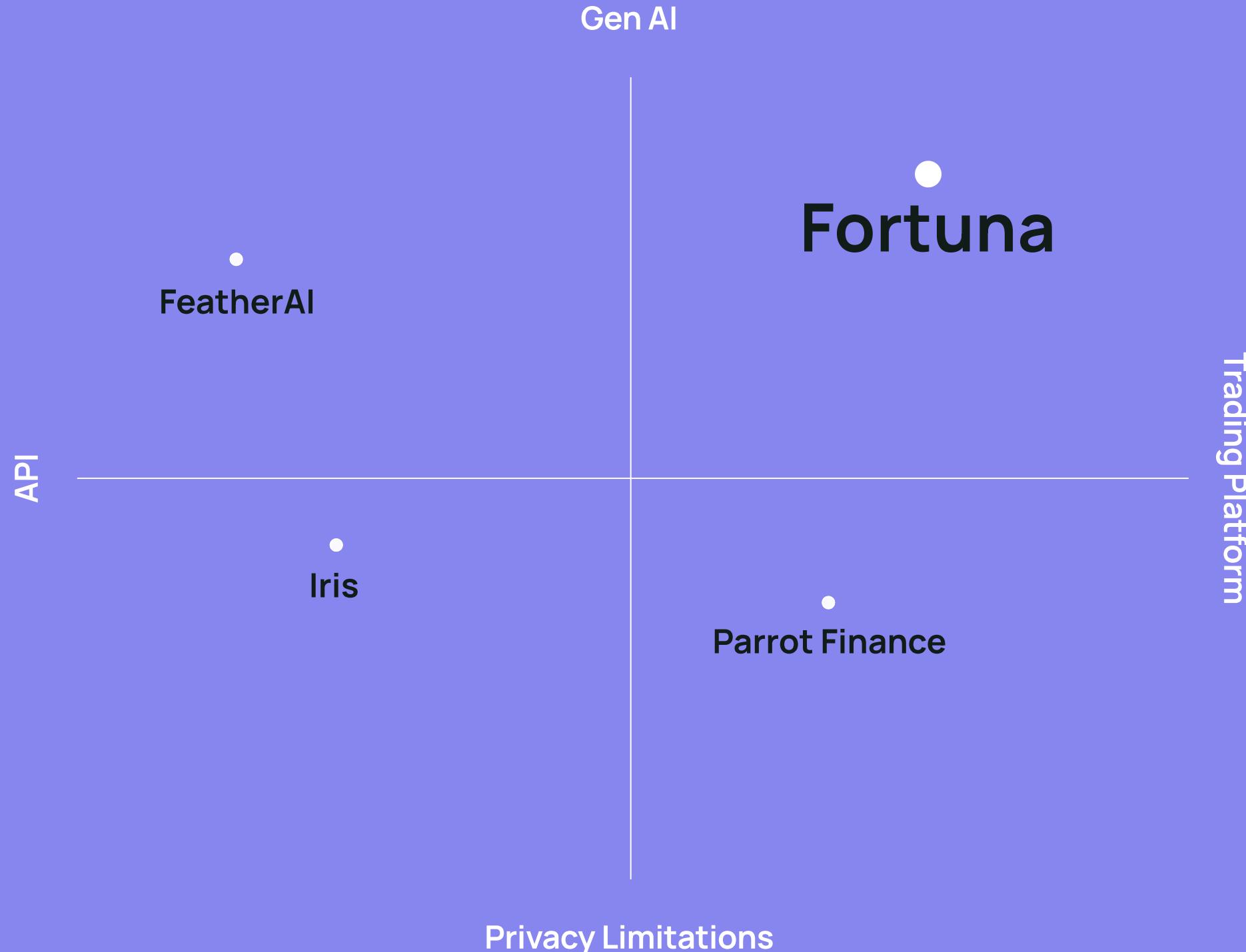
- Each Finfluencer sets their own subscription share live Trades

## ROADMAP

**Transaction Based**

- Equities PFOF
- ETFs

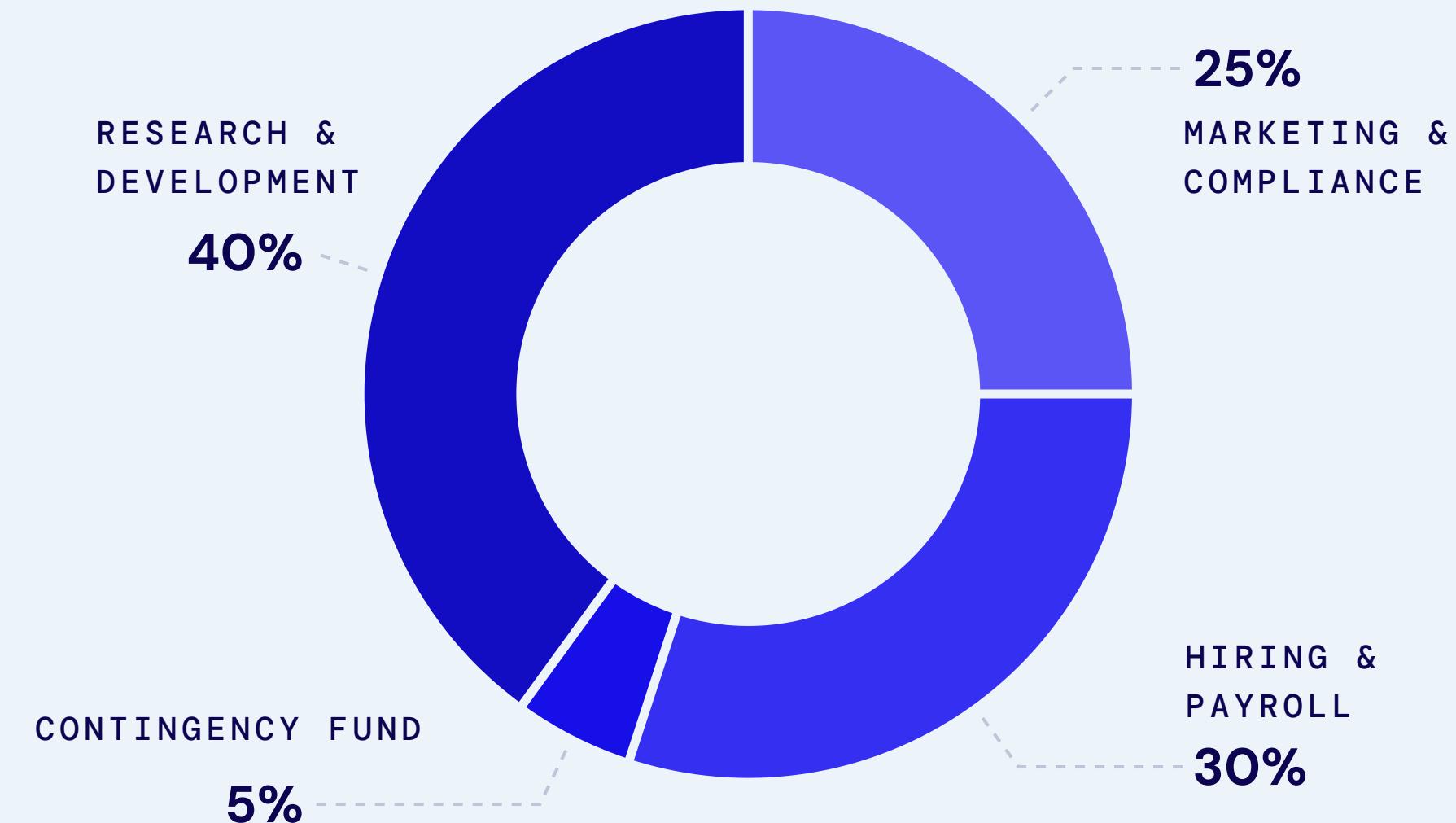
## COMPETITOR ANALYSIS



- **Feather AI** is a GenAI hedge fund money manager API. (YC'23)
- **Iris** is a platform for sharing assets with friends and investing together. Currently in Beta
- **Parrot Finance** is an app that lets you mimic others' trades. (Techstars'21)

## DEAL TERMS

\$250K at 5M  
(Pre-Seed)



# THANK YOU