



Bridging TradFi and DeFi through Ethereum and EVM: A Pathway to Innovation



Agenda

- 1. Opening Remarks (10'')**
- 2. TradFi Going DeFi (30'')**
- 3. Case Studies: New EVM-Compatible Rails for Cross-Border, FX, and Securities Settlement (30'')**
- 4. The Journey from Permissioned EVMs to Ethereum Mainnet (30'')**
- 5. Q&A (15'')**
- 6. Closing (5'')**



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Opening Remarks

**Abhinav Goel**

Client Solutionslead @ Partior

**Bruno Batavia**

Director of Emerging Technologies @ Valor Capital Group

**Bruno Moniz**

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**Camila Rioja**

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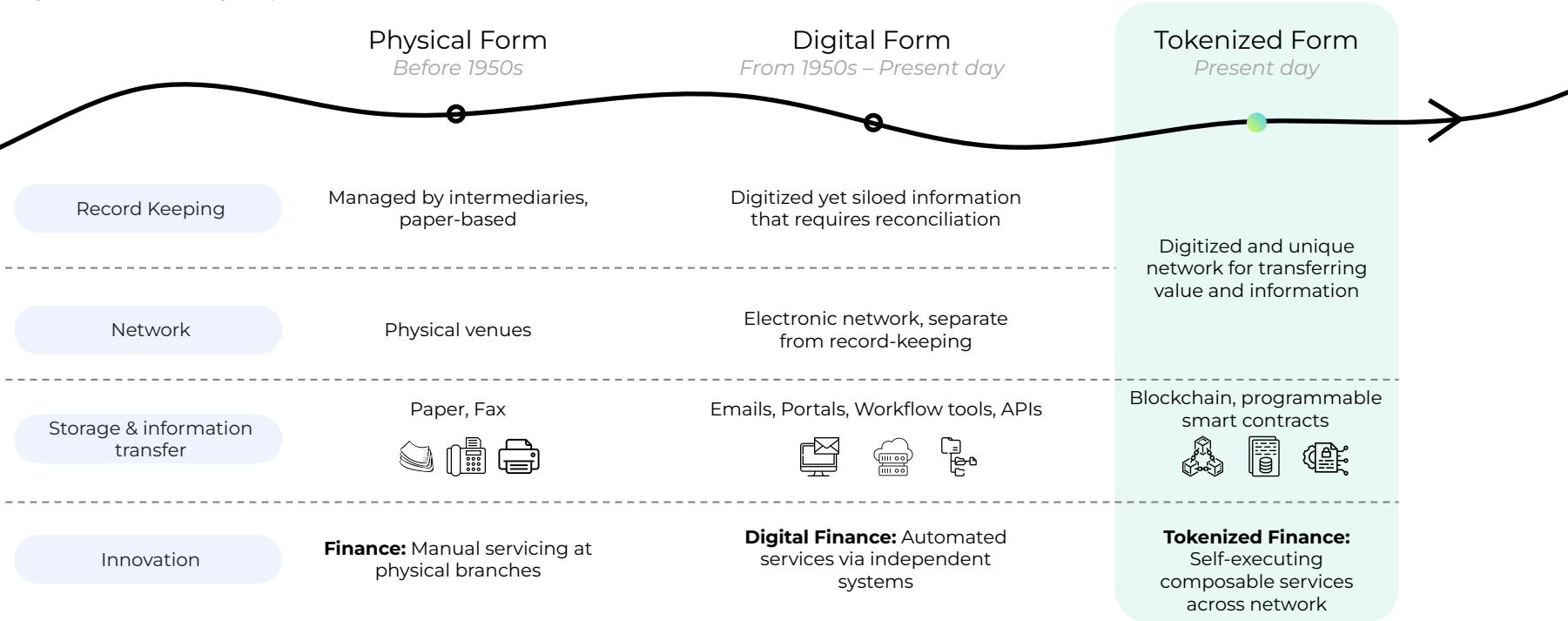
**Wee Kee Toh**

Executive Director @ JPMorgan & Kinexys Digital Payments

Financial rails are at an inflection point

Traditional Financial Infrastructure will undergo radical changes and blockchain will play a key role

History of Asset/Money Representation



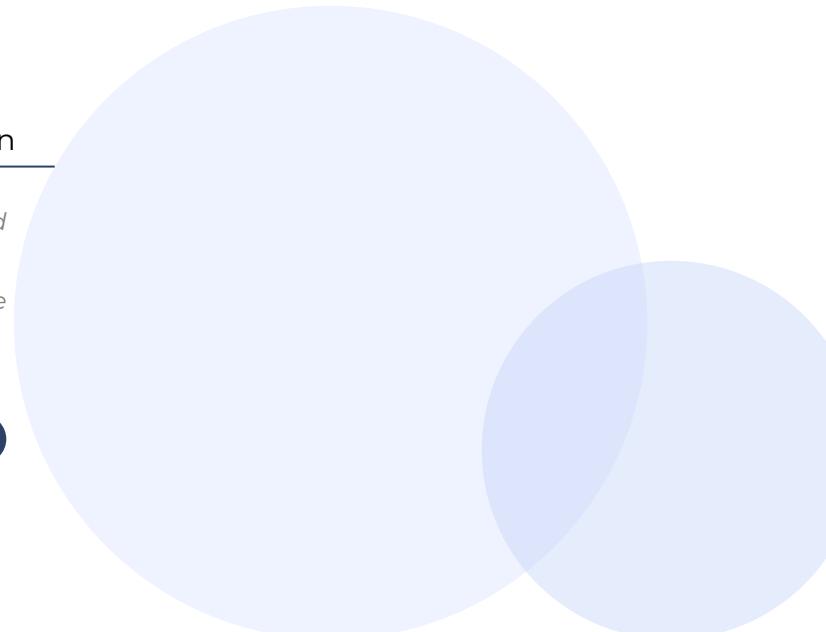
Blockchain as New Financial Rails: Financial Market Infrastructure and Real World Asset Tokenization

The migration of financial rails to blockchain will upgrade the financial system and enable a new wave of innovation

1 Real world Asset Tokenization

- Tokenization and integration between all currently disconnected asset classes
- Similar to money digitization in the 1950s - 1990s
- CBDC enabled; Regulatory unlock

Asset Class Potential Size: \$1,437 Tn



2 FMI¹ optimization

- Migration of Financial market infrastructure to more efficient blockchain rails
- Similar to cloud migration in the 2010s
- Enabled by private initiative

Estimated Market Size: \$3.2Tn+

1 Real World Asset Tokenization: Opportunity Sizing

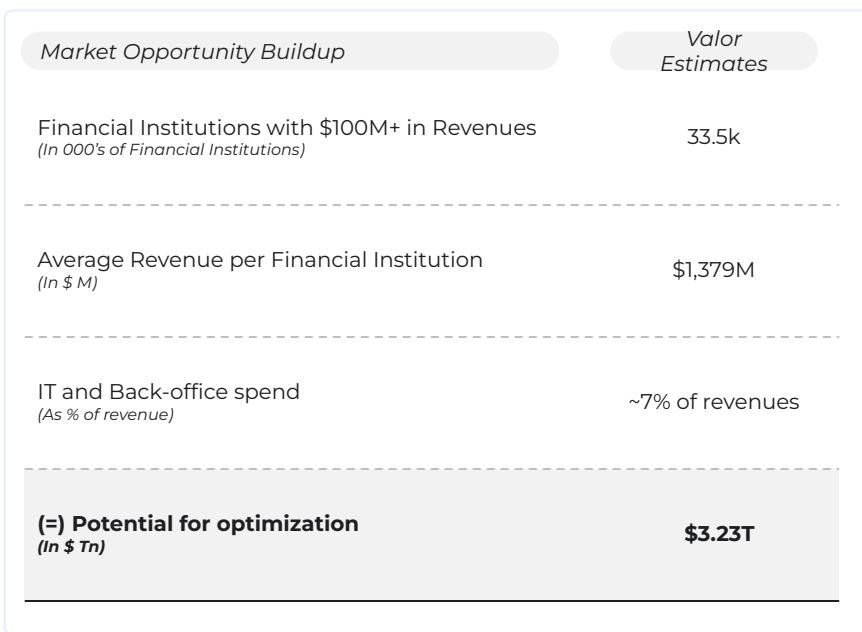
The tokenization of money and different asset classes will drive massive efficiency and enable new business models

	Balance or the current value Global	Balance or the current value Brazil	Asset in tokenized form
Currency (M1)	\$7 Trillion	\$120 Billion	Stablecoins currently represent ~97% of all tokenized assets
Government bonds + Private Debt	\$277 Trillion	\$4.2 Trillion	
Derivatives	\$667.1 Trillion	\$1.9 Trillion	
Commodities	\$116 Trillion ²	\$2.4 Trillion	
Real Estate	\$280.6 Trillion	\$6.4 Trillion	
Stock market	\$89.5 Trillion	\$860 Billion	
	\$1,437.2 Trillion	\$15.9 Trillion	Regulators, Financial Institutions and Fintechs and are joining the DeFi bandwagon to drive a new wave of financial innovation on top of blockchain-based rails

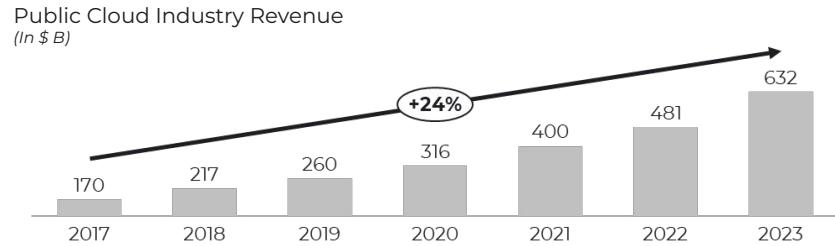
2 Financial Market Infrastructure: Opportunity Sizing

Financial services is the industry with the largest spend in IT & infrastructure technology. Blockchain is set to disrupt this market in a similar way to cloud technologies

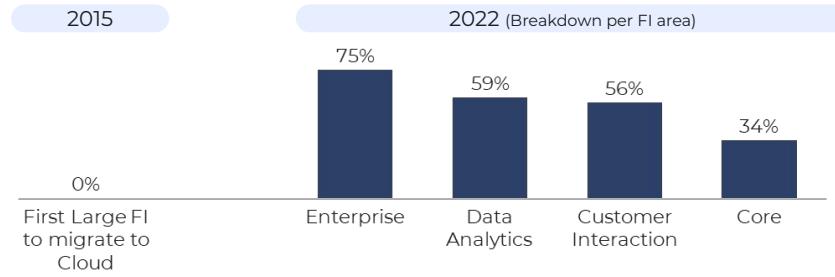
Blockchain will disrupt the \$3T+ Financial Services Technology market



Parallel to Cloud adoption in Financial Services - Blockchain is close to a similar tipping point



Financial Services Cloud Migration
(As % of North American Financial Institutions)



Leading institutions are migrating to Blockchain

Blockchain technology brings a layer of intelligence and programmability via smart contracts – a secure, transparent and efficient back-end infrastructure for financial markets

Blockchain has been adopted across the major financial institutions



JP Morgan has an entire division to develop an instant transfer and clearing solution using blockchain

BlackRock has launched both retail and institutional solutions with blockchain technology.

Development of a tokenization stack

Financial institutions that Valor has ongoing conversations to assist senior management with digital assets strategy



Larry Fink
CEO
BlackRock



We believe the next step going forward will be the tokenization of financial assets – Every bond and every stock will be tokenized”

Regulators are promoting tokenization

Selected Central Banks with advanced Digital Assets Initiatives



Monetary Authority
of Singapore



EUROPEAN CENTRAL BANK
EUROSYSTEM



RESERVE BANK
OF AUSTRALIA



HONG KONG MONETARY AUTHORITY
香港金融管理局



BANK OF ENGLAND



Central Bank of the UAE

Other industries and selected companies with blockchain adoption

Supply Chain



AngloAmerican

pepsi

Heineken

Media



SONY

FOX

T-Mobile

Insurance

Prudential

United Healthcare

USAA

The Convergence of DeFi and CBDCs and the role of EVM

Public EVM chains are the perfect test bed for technologies and business models that will power CBDC rails

"Brazil [Drex] is perhaps the most advanced initiative towards making unified ledgers a reality"



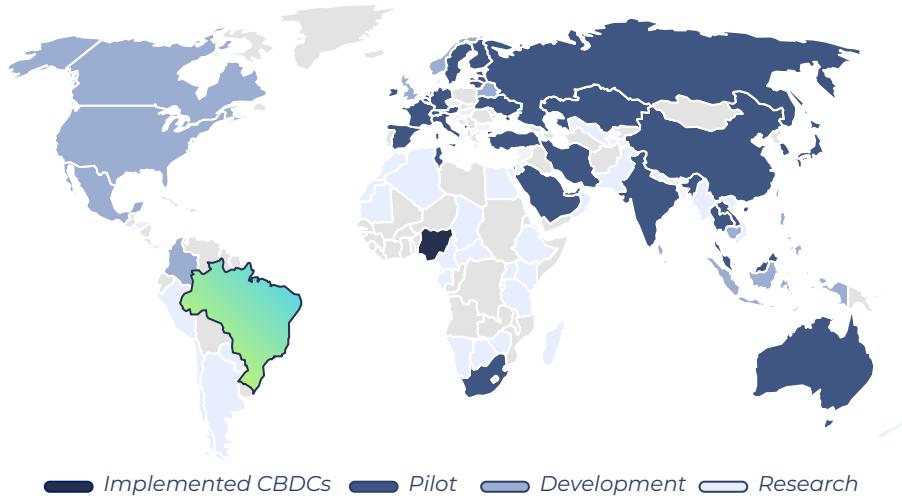
"The IMF sees Brazil's CBDC project as distinct from others. Drex introduces an additional layer of innovation."



➢ **98% of global GDP** is exploring a CBDC

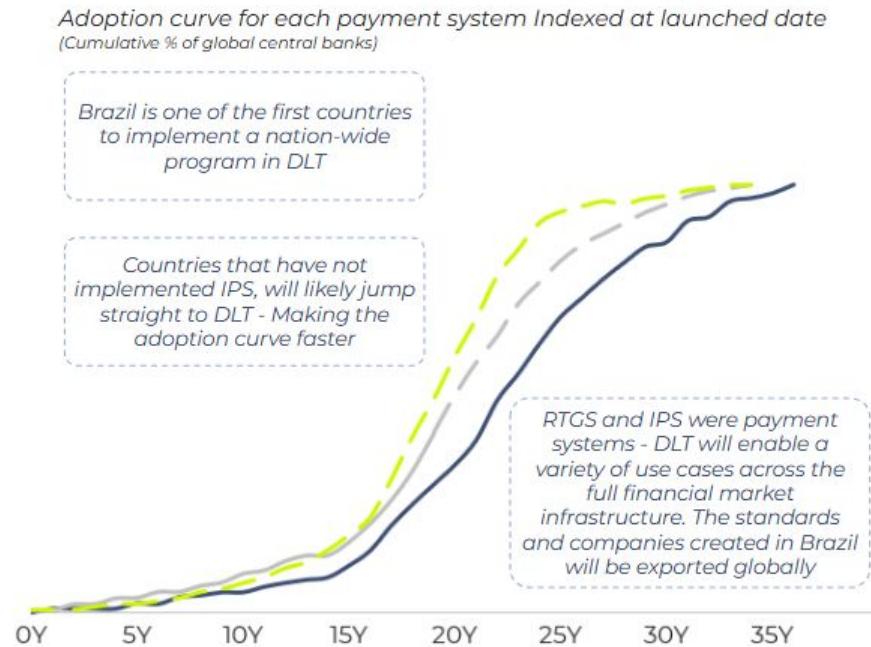
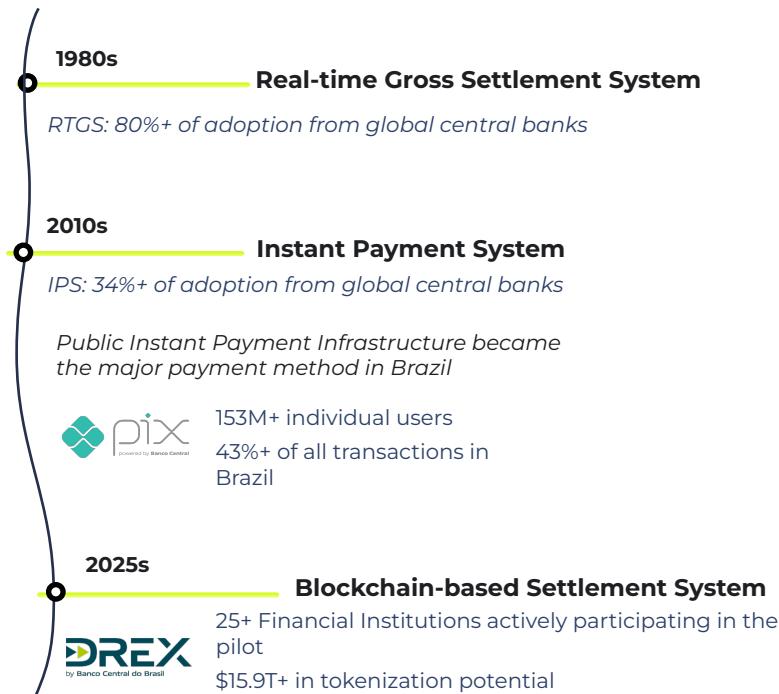
➢ **134 countries are exploring a CBDC** – Up from only 35 in May 2020

DeFi and CBDC-driven innovations will converge to form the foundation of a global blockchain-based financial infrastructure



Trends in the Evolution of Financial Rails

With Real-time gross settlement systems and Instant Payments Systems, the technology scaled in the same adoption curve - The next wave Blockchain infrastructure will also behave the same way



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TradFi Going DeFi

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Case Studies: New EVM-Compatible Rails for Cross-Border, FX, and Securities Settlement

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The Journey from Permissioned EVMS to Ethereum

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Q&A

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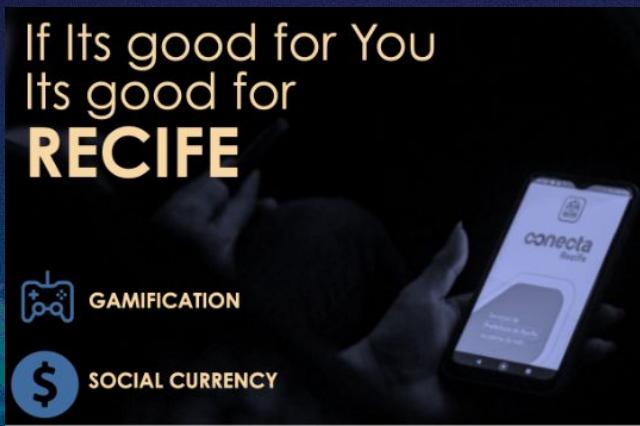
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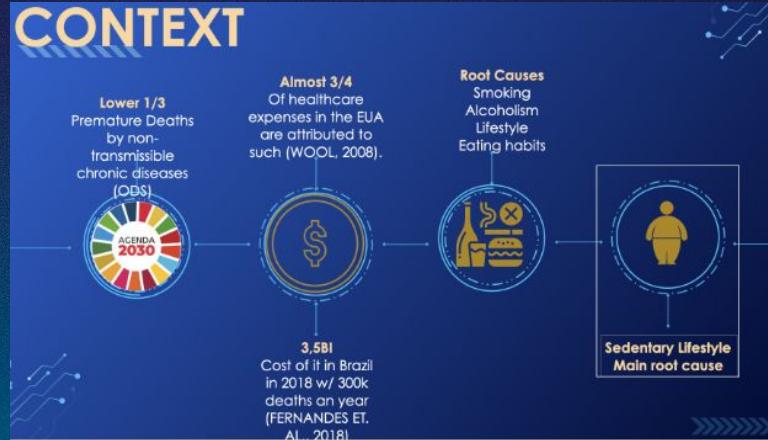
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The Capiba Project



CONTEXT



Project born at the secretariat of sports headed by Gabriel Perrusi in August 2023

- Public gyms, for free, with personal trainer
- Citizen books using Super App that managers most of public services
- Gets loyalty bonus that can be exchange by prizes offered by private and public initiatives
- 20k people exercising regularly

- Large success sparked interest in
- Expanding to other social use cases
- Exploring paying social benefits through a community currency
- Leveraging emerging tech for amplified results, including for other services of the superapp (e.g. identity)

Holding space to collab in real world implementation of open source and decentralized

Digital Public Infrastructure for Managing Public Goods

NEWS



SCIENCE, TECHNOLOGY AND INNOVATION | 04.07.24 - 15H05

Recife City Hall and Plexos Institute sign technical cooperation agreement to develop and strengthen the use of new technologies

The focus will be on the use of blockchain, a technology that has the potential to revolutionize several public services

"Among the advantages of adopting blockchain in municipal services, the following stand out: improved data management, allowing for more precise and secure control of citizens' information, and the automation of bureaucratic processes, reducing the need for intermediaries and streamlining services. With blockchain, property records, financial transactions and health data, for example, can be stored in an immutable and securely accessible way, which increases public trust in the services provided by the municipal government", explains Recife's Secretary of Science, Technology and Innovation, Rafael Figueiredo.

An Open Call to Explore Community Currencies in Recife, Brazil

Here's the timeline

Product Initial Assessment

- Tech & Infra
- Economics
- Community
- Law and
- Sandbox

Phase completed!

Collaborative Study

You are **MORE** than are invited!!!

- Gather suggestions
- Build on experience



Regulatory Sandbox and Pop up City

- Hackathon
- Demos
- MVP
- PoC

Want to sponsor,
brainstorm or
collab?

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