

# Investment Portfolio Management System

For The Energy Sector

*Long-Term Portfolio Strategy For  
Organizations And Companies  
Operating In The  
Energy Sector*



# Energy Sector Investment Portfolio Management System

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### III. Advantages of a dedicated portfolio management system for the Energy Industry - Proposed Lab2Market Product

1. *Unique positioning* in the market & prospective customer base - *utilization of advanced AI, environmental and government data.*
2. *Cost reduction* based on a dedicated industry system.
3. *Promoting green energy* and *sustainable development* via a traditional portfolio management solution.

### IV. Potential Customers

1. Reflection on a potential customer base - *everyone in the Energy Industry can benefit*

# Investment Management In The Energy Sector Today

## Private Sector - Current Investment, Risk Management and Advisory Services

### Portfolio Management Systems

aladdin  
morningstar  
seekingalpha  
bloomberg

- The platforms are industry agnostic - not dedicated to the Energy Sector.
- *Active trading requires strategy management and a portfolio manager with in-depth experience in the Energy Sector.* This is usually expensive.
- The portfolio management platforms do not support or incorporate industry information about government incentives for investments in green energy or sustainable development.

### Asset Management and Advisory Services

j.pmorgan  
marakon  
statestreet  
vanguard  
  
blackrock  
fidelity

- Advisory services are the most common option for customers that need in-depth, comprehensive and reliable industry analysis in the Energy Sector, however two main factors impact the access to those services:
  - 1) *High costs*
  - 2) *Time to produce reports and recommendations* that fit the needs of the customer - the due diligence process of onboarding and serving a customer takes time and is associated with ongoing fees.

# Investment Management In The Energy Sector Today

## Public Sector - Government Energy Programs and Policies Incorporating Long-Term Strategy of Diversification and Green Energy

### National Renewable Energy Laboratory



- The National Renewable Energy Laboratory is a national laboratory of the US Department of Energy. The NREL:
  - *Transforms energy through research, development, commercialization, and deployment of renewable energy and energy efficiency technologies*
  - *Accelerates the transition of renewable energy and energy efficiency technologies to the marketplace through partnerships.*

### Vision 2050



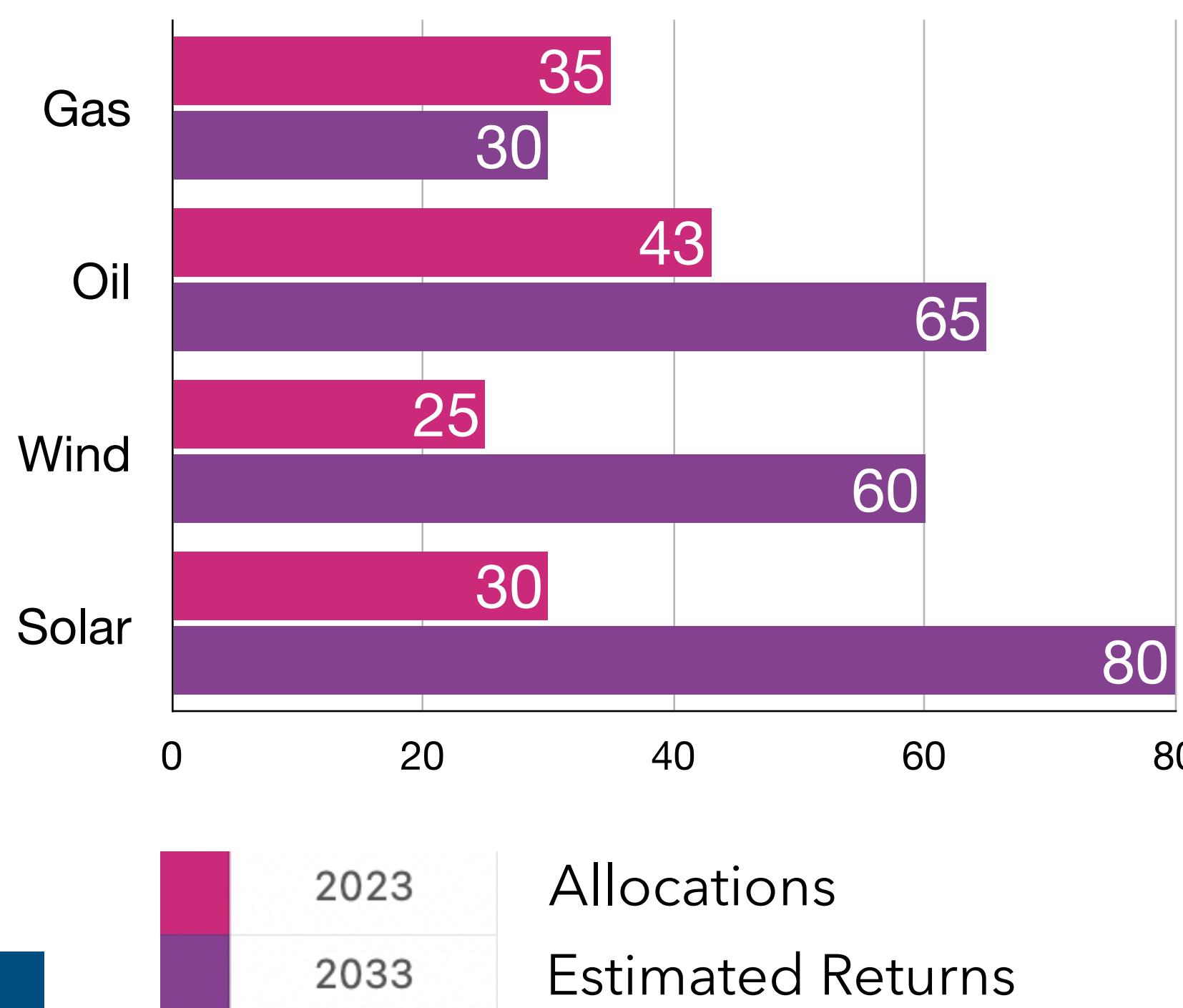
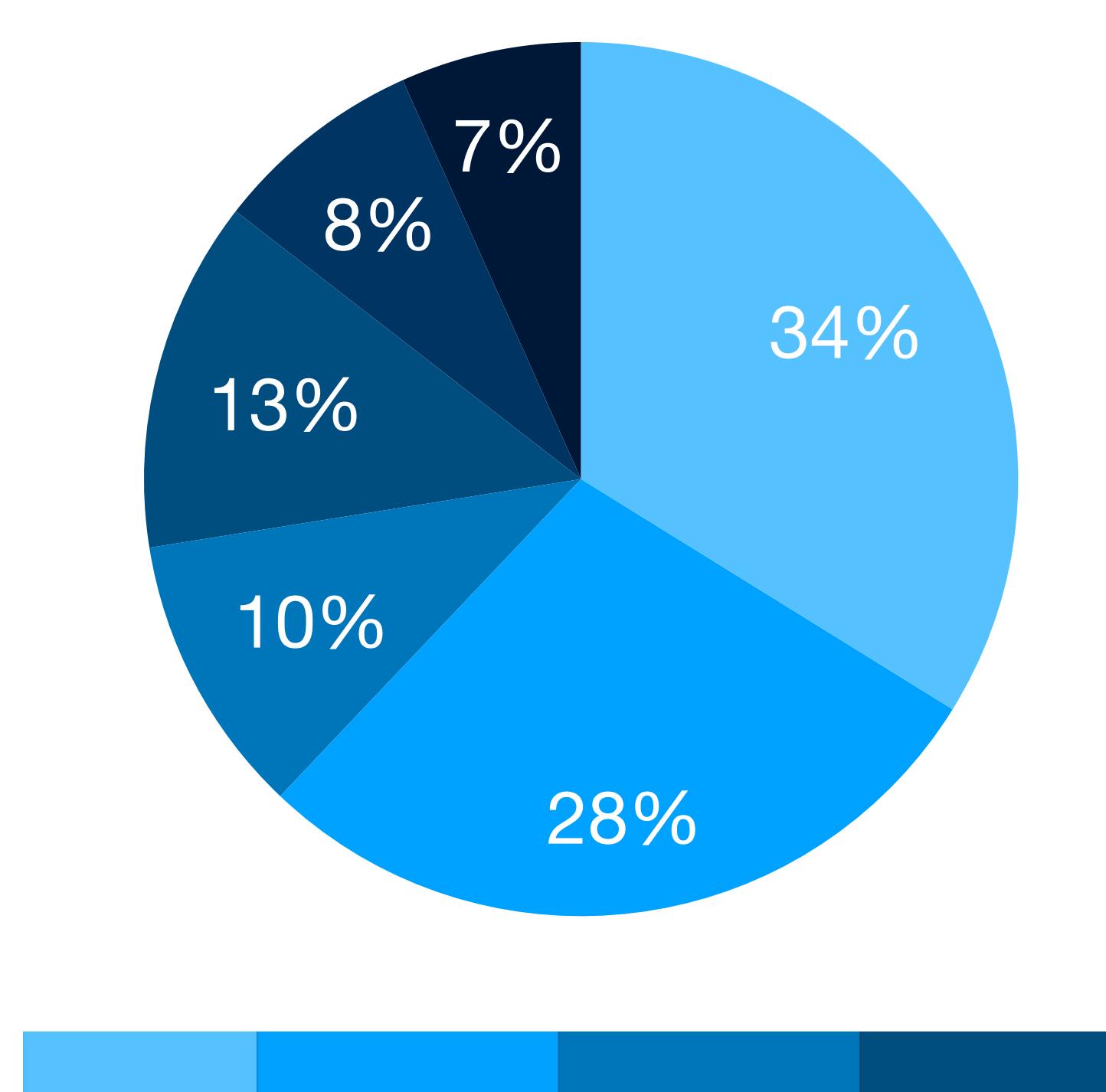
- '*Vision 2050 centers on a commitment to renew the electricity system through the optimal evolution of electricity supply and demand, so as to deliver maximum value to customers and citizens, and to contribute to a lower carbon economy.*' Vision 2050 offers recommendations regarding the following financial instruments:

- North American *carbon price*
- Operator subsidy programs, A capital subsidy, Loan Guarantees
- Energy efficiency programs

# Proposed Lab2Market Product

## Portfolio Management System For The Energy Industry - Investment Component

### Sample Portfolio Profile | Long-term strategy (5-10yrs)



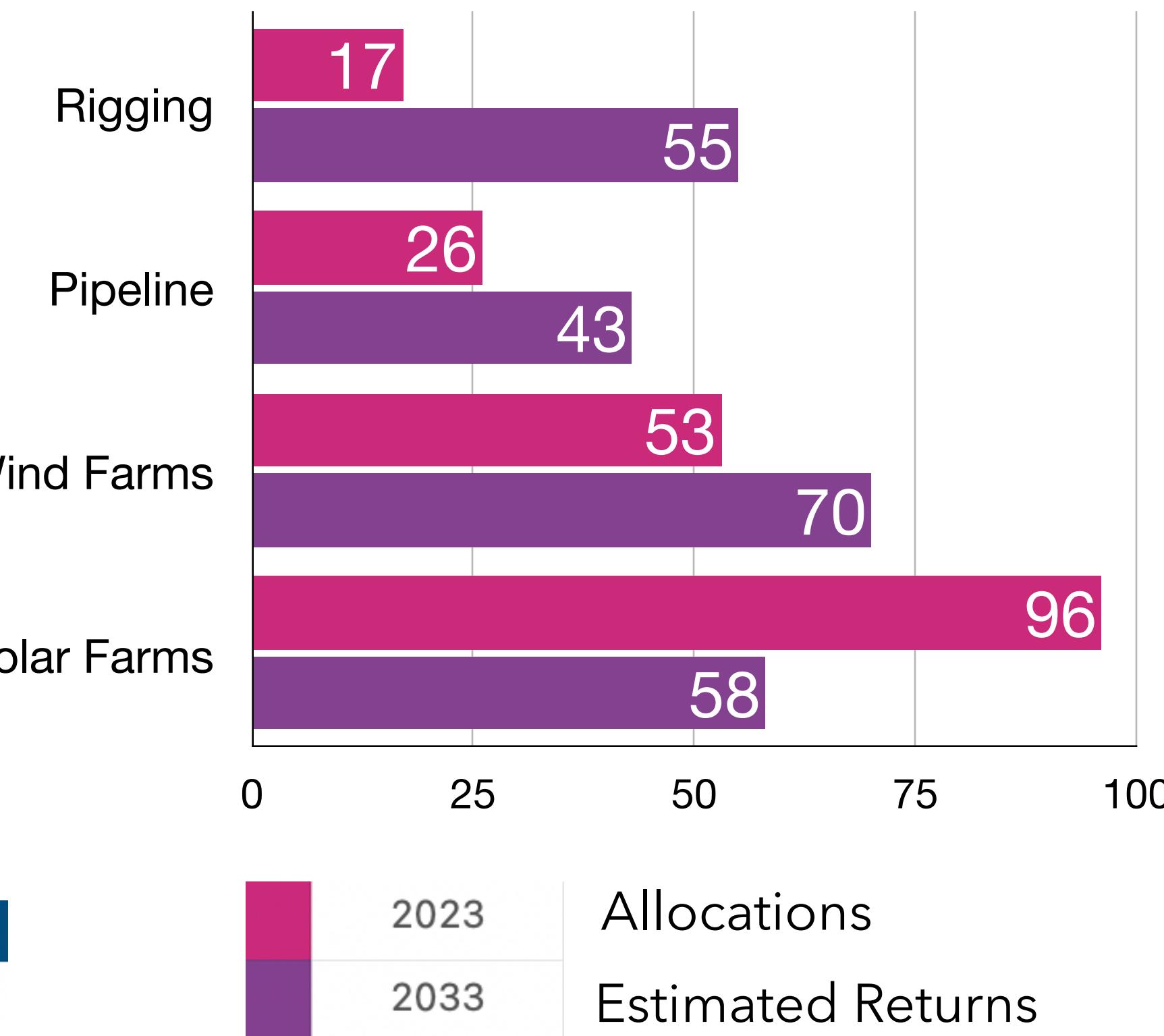
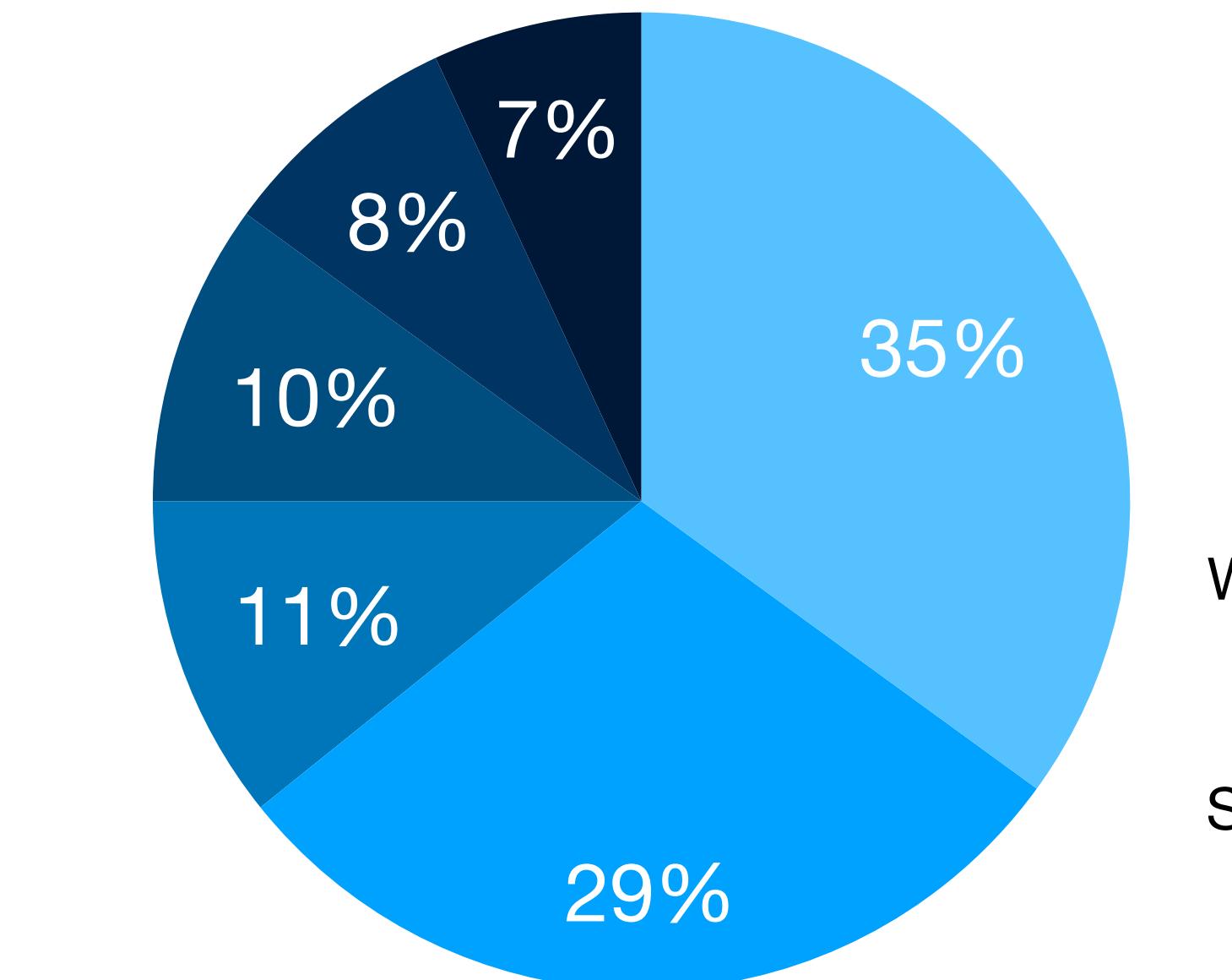
Existing Regional Opportunities

Region	North & South Americas
<i>Portfolio Green Rating</i>	8 (Max 10)
<i>Government Incentives</i>	4 positions in Green energy (10yr and move) with <i>Carbon Tax impact</i>
<i>Nuclear &amp; Other Environmental Hazards</i>	Low (Nuclear PP Decommissioning in progress - 2 sites near oil investments)
Insurance Rating	AAA (Futures contracts)
Required Hold Period	Minimum 5yrs
Purchasing Options	Bonds, Equity, Currency, Crypto (from certified exchanges only)

# Proposed Lab2Market Product (Continued)

## Portfolio Management System For The Energy Industry - Investment & Development Component

### Sample Portfolio Profile | Long-term strategy



Region	North & South Americas
<i>Portfolio Green Rating</i>	8 (Max 10)
<i>Government Incentives</i>	For All Development Investments through Energy Programs
<i>Nuclear &amp; Other Environmental Hazards</i>	Low (Decommissioning in progress - 2 sites near oil investments)
Insurance Rating	AA+ - Non-Seismic, Low-Conflict areas
Ownership	Partnership or Full
Purchasing Options	Bonds, Equity, Currency, Crypto (from certified exchanges only)

# Advantages Of A Dedicated Portfolio Management System

## Benefits Not Available From Currently Existing Portfolio Management Systems

1. *Unique positioning* in the market based on the utilization of advanced technology for data processing, such as, *machine learning and artificial intelligence*.
  - Platform that combines the Energy industry market data with government and environmental data in order to enhance sustainable development and investment is *positioned uniquely to win the market and retain a loyal customer base*.
2. *Cost reduction* based on the adoption of a dedicated technologically advanced system for the Energy Industry.
  - No need to hire experts in portfolio management with long-term investment experience in the Energy Industry.
  - High fees for advisory services can be avoided.
3. A dedicated portfolio solution including external analysis of the *green energy* industry and *sustainable development in the energy markets*. Utilization of data reflecting government policies *promoting the future vision for the development of the Energy Industry*.
  - Taken as a whole, the product has no rivals. Custom or in-house solutions may exist, but they are not open to everyone.

# Advantages Of A Dedicated Portfolio Management System (Cont.)

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## Benefits From New Features That Are Not Part Of Traditional PM Products

### 1. *Environmental Hazards Rating*

The platform will provide estimates of the characteristics of the terrain and the overall environmental conditions under which energy companies operate.

- The assessment will accompany all portfolio profiles generated by the system. Its intent is to incentivize responsible and informed investment and development in the Energy Industry.

- In the long-run, investors profit from such information by avoiding the pitfalls of decisions based only on short-term profit forecasts and revenue numbers.

### 2. *Green Rating*

The intent is to build an investment platform that, for the first time, *rates a portfolio as Green for being truly Green*. The Green portfolio is a mix of positions that to great extent represents the next generation of energy sources in the industry. Truly Green rating is about the ROI too, and more specifically, it is about increasing revenue based on:

- *Safety*
- *Reduced Carbon Footprint*
- *Future Sustainability Targets in the Energy Industry*

The goal is not to rate or grade the market but to demonstrate how truly Green investments mean smart decisions.

# Advantages Of A Dedicated Portfolio Management System (Cont.)

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## Benefits From New Features That Are Not Part Of Traditional PM Products

### *3. Sustainable Development*

The proposed platform will integrate data that shows opportunities in terms of overall long-term outcomes.



The intent is not only to offer the most sustainable and profitable options to investors but also to *educate* them to make decisions that reflect the changes in the Energy Industry.

*Using hybrid strategies for investment* that have not only more stable ROI but also represent a global vision for Greener future and alternative energy sources, *investors can achieve long-term goals they are not offered via traditional investment platforms.*

# Reflection On The Customer Base

## Everyone In The Energy Industry Can Benefit

### Government Organizations



### Private Companies



The proposed Lab2Market product is an advanced technological solution focused on the future vision of the Energy Industry that will:

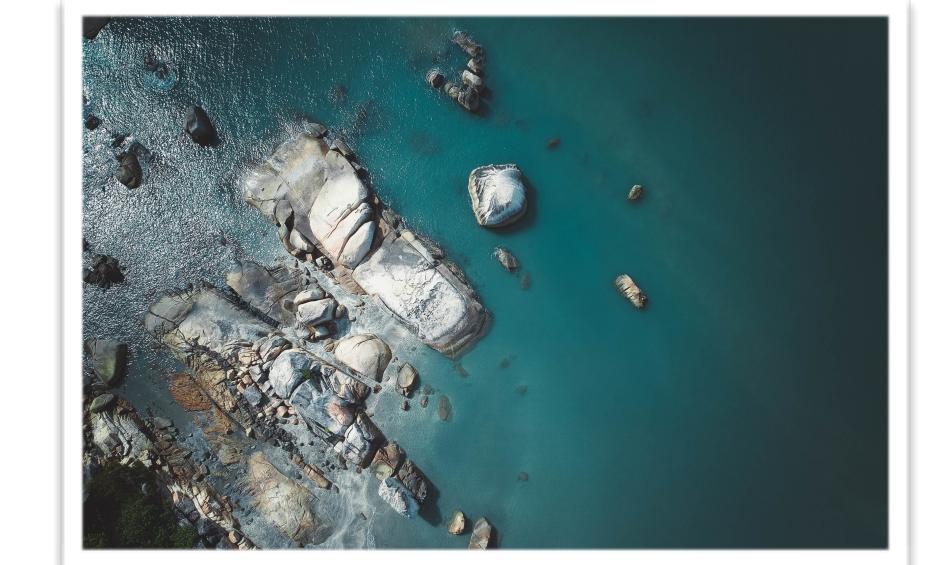
- *Provide an advanced financial analysis based on Machine Learning and Artificial Intelligence technologies*

- *Reduce operating costs*

- *Promote and educate*

- *Incentivize the investment in the future vision of the Energy Sector.*

### NGOs



### Worldwide





Thank you!