

ETCHA COMPANY

SKETCH CONNECTIONS BETWEEN PREDICTION MARKETS AND OTHER INVESTMENTS

PREDICTION MARKETS ARE TAKING OFF

- ❑ IN NOVEMBER 2024, THE "FRENCH WHALE" MADE \$30M ON POLYMARKET BETTING ON TRUMP'S WIN
- ❑ IN 2025, THE TRUMP ADMINISTRATION MADE IT LEGAL FOR AMERICANS TO TRADE ON POLYMARKET AND KALSHI
- ❑ [MAYBE HAVE THIS PAGE BE A CHART OF MAUS FOR PREDICTION MARKETS, WITH THE PREVIOUS TWO BULLET POINTS AS CALLOUTS]
- ❑ [THIS COULD BE A TIMELINE OF VENTURE ROUNDS IN KALSHI, POLYMARKET, AND OTHERS, WITH CALLOUTS]
- ❑ [IT COULD BE A CHART OF VALUATION ON Y-AXIS FOR KALSHI OR POLYMARKET OR BOTH, WITH CALLOUTS]

LARGE INVESTORS USE PREDICTION MARKETS FOR OTHER INVESTMENTS

"MY CONCLUSION IS THAT INCORPORATING BOTH A BETTING MARKET LIKE @POLYMARKET ALONG WITH STRUCTURED, INFORMED JUDGEMENT IS PROBABLY THE BEST COURSE."

-BILLIONAIRE HEDGE FUND MANAGER DANIEL LOEB, NOVEMBER 2024

BUT CONNECTING THEM TO INVESTMENTS IS HARD

[?]

WE ARE THE EXPERTS IN CONNECTING ODDS FOR EVENTS TO ODDS FOR INVESTMENTS

- ❑ FOUNDER PETER MOORE LEARNED DECISION TREES AS STANFORD MBA
- ❑ HE APPLIED THEM TO EVENT-DRIVEN INVESTING IN RISK ARBITRAGE AND CONVERTIBLE ARBITRAGE
- ❑ HE TRIED TO APPLY THEM IN VENTURE CAPITAL & PRIVATE EQUITY AT \$20B APAX PARTNERS BUT FOUND THEM UNSCALABLE
- ❑ HE WON \$1.5B IN NATIONAL SCIENCE FOUNDATION GRANTS TO APPLY ONTOLOGY RESEARCH FROM STANFORD MED SCHOOL
- ❑ BUILT SaaS TO CONNECT QUANTIFY STORIES IN SCENARIOS, REPRESENTING INVESTMENTS AS CONNECTED EVENTS
- ❑ APPLIED IT TO RUN A HEDGE FUND WITH 3% ANNUALIZED ALPHA OVER 7 YEARS
- ❑ APPLIED IT TO CO-MANAGE A \$1 BILLION "CENTER BOOK" AT THE HARVARD ENDOWMENT, CONNECTING TO OTHER INTERNAL PORTFOLIOS
- ❑ APPLIED IT TO WORK WITH PRIVATE EQUITY INVESTORS ON OVER 100 PRIVATE INVESTMENTS OVER MORE THAN 5 YEARS

OUR PATENTED ONTOLOGY PROVIDES THE PERFECT FORMAT FOR CONNECTING

- ❑ WE PATENTED AN ONTOLOGY TO HELP INVESTORS ANTICIPATE FUTURE CHANGES IN OTHER INVESTORS' ODDS FOR ANYTHING
- ❑ WE APPLIED THIS IN SAAS THAT HELPS INVESTORS ANTICIPATE FUTURE RETURN ON INVESTMENTS IN COMPANIES
- ❑ THAT SAAS HAS BEEN USED TO MAKE OVER 100 INVESTMENTS IN PRIVATE AND PUBLIC COMPANIES
- ❑ NOW WE PROVIDE AN INTERFACE TO CONNECT PREDICTION MARKETS TO SCENARIOS FOR COMPANIES' FORECASTS & VALUATION