

AI Trading Platform

Democratizing AI-Powered Trading for Everyone



Market Opportunity

Algorithmic Trading Market

\$31.5B

Projected market size by 2028

12.7%

Annual growth rate (CAGR)

Key Market Trends

- Democratization of trading technology
- Rapid AI adoption in financial services
- Exponential growth in market data volume
- Shift toward remote digital trading platforms

Algorithmic Trading Market Growth



AI Adoption in Financial Services



Problem & Solution

Key Challenges for Traders

⚠ Complexity Barrier

Advanced trading strategies require programming expertise and deep financial knowledge, limiting access for most traders.

⚠ Data Overload

Traders struggle to process the exponentially growing volume of market data and identify actionable insights.

⚠ Emotional Trading

Human emotions lead to impulsive decisions, deviations from strategy, and poor risk management.

⚠ Limited Backtesting

Retail traders lack access to institutional-grade backtesting tools that accurately model market conditions.

Our Platform Solutions

✔ Visual Strategy Builder

Intuitive interface allows traders to create sophisticated strategies without coding, democratizing advanced trading techniques.

✔ AI-Powered Analysis

Machine learning models process vast amounts of market data to identify patterns and generate actionable trading signals.

✔ Automated Execution

Rule-based and AI-driven execution removes emotional bias and ensures consistent strategy implementation.

✔ Comprehensive Backtesting

Institutional-grade backtesting with accurate modeling of transaction costs, slippage, and market impact.

Platform Overview

Core Platform Capabilities



AI-Powered Strategy Builder

Visual interface for creating sophisticated trading strategies combining traditional rules with AI models. No coding required.



Comprehensive Backtesting

Institutional-grade backtesting with accurate modeling of transaction costs, slippage, and market impact across multiple timeframes.



AI Chatbot Assistant

Context-aware AI assistant providing personalized support, market insights, and educational content throughout the trading process.



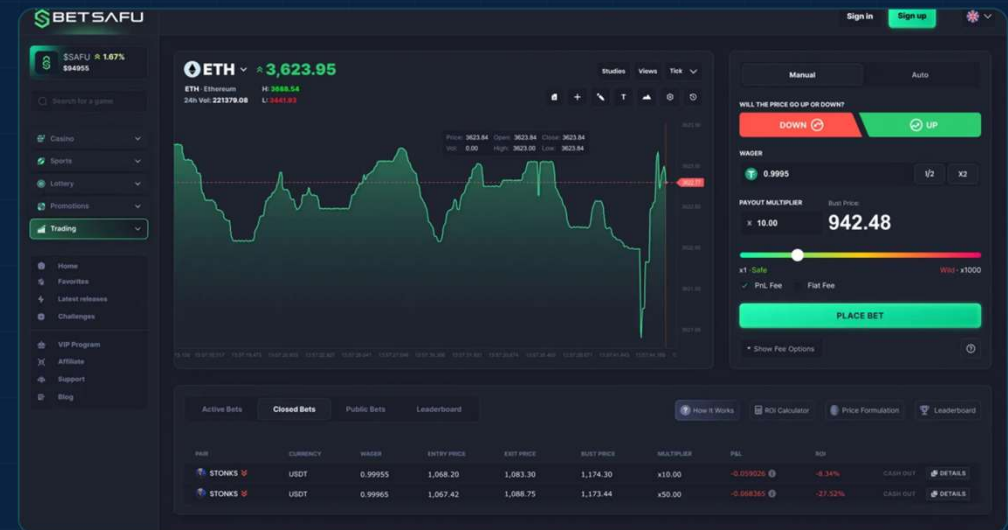
Reinforcement Learning Models

Advanced RL agents that adapt to changing market conditions and optimize position sizing for maximum risk-adjusted returns.



Risk Management Controls

Comprehensive risk controls including position sizing recommendations, automated stop-loss functionality, and portfolio diversification analysis.



Intuitive User Interface

Sophisticated capabilities with an accessible design that grows with user expertise

100+

Technical Indicators

5+

AI Model Types

10+

Asset Classes

20+

Data Sources

The AI Advantage

Our AI Technology Stack

📈 Supervised Learning Models

LSTM and GRU neural networks trained on historical market data to predict price movements and identify trading opportunities with up to 68% directional accuracy.

🤖 Reinforcement Learning Agents

DQN agents that learn optimal trading strategies through market interaction, with planned expansion to PPO and SAC algorithms for enhanced performance in volatile markets.

💬 Natural Language Processing

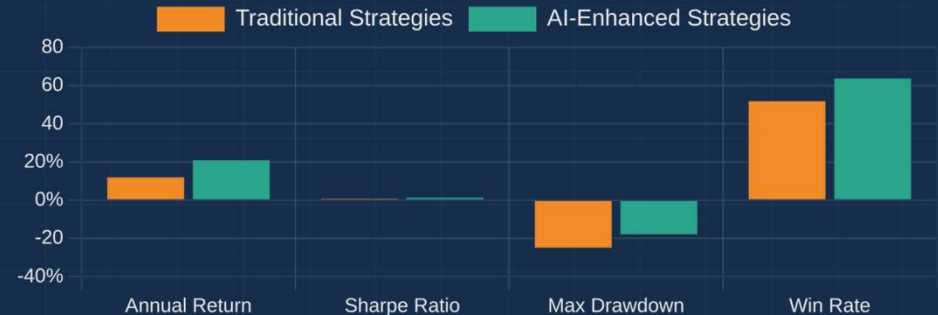
Advanced NLP models power our context-aware chatbot assistant, providing personalized guidance and translating complex financial concepts into actionable insights.

🧠 Hybrid Intelligence System

Our proprietary system combines multiple AI approaches with traditional

AI Performance Advantage

Performance Comparison (Backtest Results)



Key Differentiators

✓ Transparent AI

Our models explain recommendations rather than operating as black boxes, building user trust.

✓ Multi-Model Integration

Different AI models work in concert, providing more robust analysis than single-model approaches.

✓ Continuous Learning

Models improve with platform usage and new market data, adapting to changing conditions.

✓ Customizable AI





Users can adjust AI parameters to match their trading style and risk tolerance.

Business Model

Subscription Tiers

Basic \$49/month	Professional \$149/month	Institutional \$499+/month
<ul style="list-style-type: none">✓ Core platform access✓ Limited strategy complexity✓ Standard data feeds✓ Basic AI models	<ul style="list-style-type: none">✓ Full platform access✓ Advanced AI models✓ Premium data feeds✓ Priority support	<ul style="list-style-type: none">✓ Enterprise features✓ API access✓ Custom model support✓ Dedicated resources

Additional Revenue Streams

 Premium Data Specialized market data and alternative data feeds	 Educational Content Advanced courses and strategy templates
 API Access Customized data feeds for integration	 White-Label Solutions Customized platform for financial institutions

Financial Projections

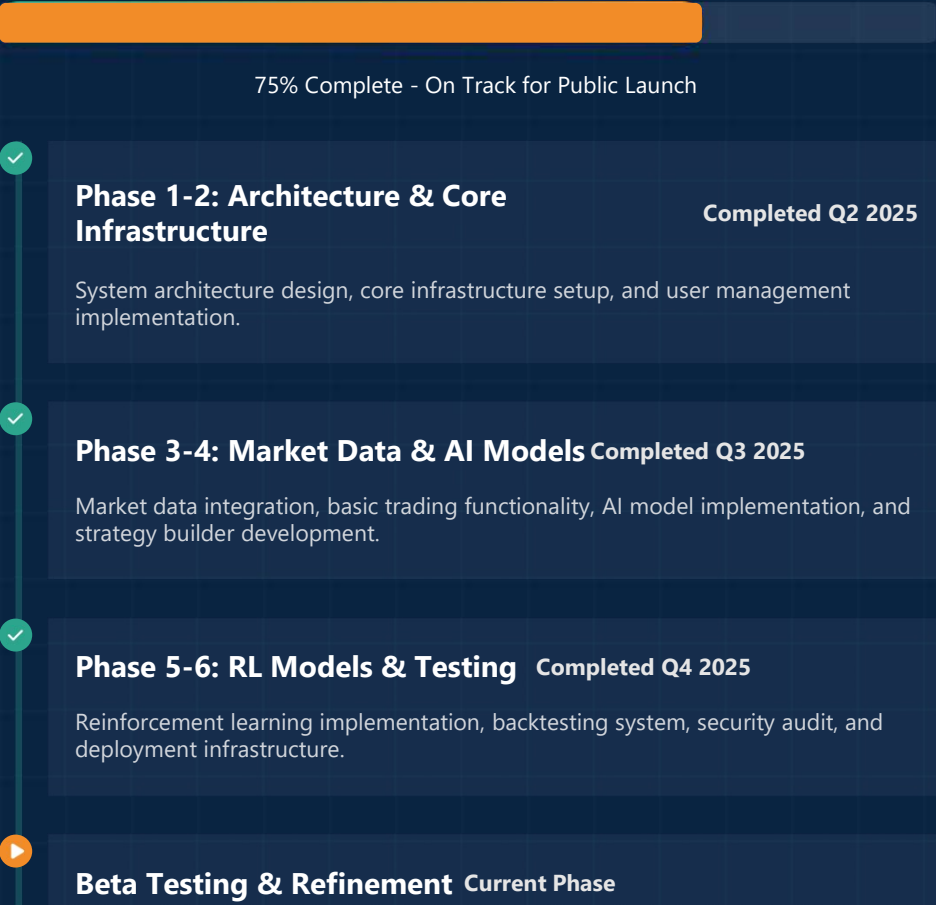


Market Expansion Strategy


- Sophisticated Retail Traders**
Initial focus on experienced individual traders seeking advanced tools
- Financial Institutions**
Expand to wealth management firms and investment advisors
- White-Label Partners**
Develop solutions for brokerages and financial advisors
- International Markets**
Expand globally with localized versions and regional data

Development Status

Development Timeline




Upcoming Milestones

- 


Jan 2026

Beta Testing Launch

Initial beta release to selected testers with comprehensive feedback collection framework.
- 


Apr 2026

Public Beta Release

Expanded beta access with refined features based on initial testing feedback.
- 


Jul 2026

Official Platform Launch

Full public release with complete feature set and subscription model activation.
- 


Q3 2026

Advanced AI Models (PPO/SAC)

Implementation of advanced reinforcement learning algorithms for enhanced performance.
- 

Q4 2026

Mobile Application Release

Native mobile applications for iOS and Android with core platform functionality.
- 

Q1 2027

Institutional Features Expansion

Enhanced enterprise capabilities and white-label solutions for financial institutions.

Our Team

Leadership Team



Dr. Jennifer Davis

CEO & Co-Founder

Former quantitative researcher at Goldman Sachs with 12+ years of experience in algorithmic trading. PhD in Financial Engineering from MIT. Led the development of multiple successful trading systems managing over \$2B in assets.

Advisory Board



Robert Blackwell

Former CIO, Bridgewater Associates



Dr. Sarah Lin

Professor of Finance, Harvard



Elena Johnson

Former SEC Commissioner



Thomas Patel

Founder, FinTech Ventures



David Martinez

CTO, Global Exchange Group

Team Expertise

Technical Expertise

- Machine Learning
- Reinforcement Learning
- Cloud Architecture
- NLP
- Real-time Systems

Financial Expertise

- Algorithmic Trading
- Risk Management
- Portfolio Optimization
- Market Microstructure

18

Team Members

12

PhDs & Masters

85+

Years Combined Experience

Investment Opportunity

Investment Highlights



Market Timing

Entering a rapidly growing algorithmic trading market at an inflection point in AI adoption, with projected CAGR of 12.7% reaching \$31.5B by 2028.



Proven Technology

Six completed development phases with working platform ready for beta testing. Proprietary AI models demonstrate significant performance advantages in backtesting.



Experienced Team

Leadership combining deep financial expertise with AI and technology backgrounds. 85+ years of combined experience in quantitative finance and machine learning.



Scalable Business Model

Subscription-based revenue with high margins and multiple expansion opportunities. Additional revenue streams from premium data, educational content, and white-label solutions.



Clear Exit Potential

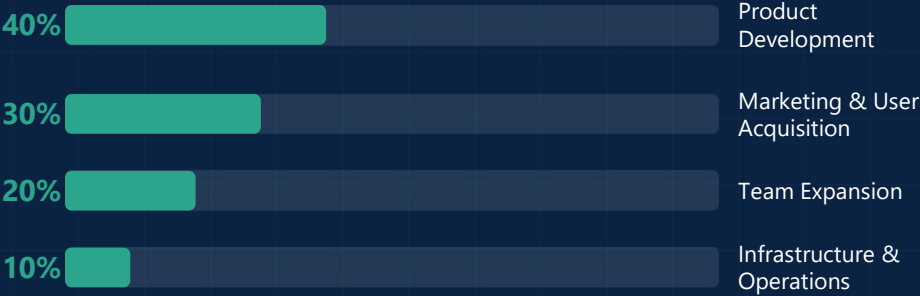
Strategic acquisition target for financial institutions, trading platforms, or fintech leaders. Recent comparable acquisitions valued at 8-12x ARR.

Funding Request

\$5 Million

Series A Funding

Use of Funds



Key Financial Metrics

\$3.75M

7,500

Next Steps

90-Day Roadmap



Immediate Actions

- Due Diligence**
Schedule technical and financial due diligence sessions to review platform architecture, AI models, and financial projections in detail.
- Platform Demo**
Arrange live demonstration of the AI Trading Platform with hands-on exploration of key features and AI capabilities.
- Term Sheet Discussion**
Begin term sheet negotiations to establish investment structure, valuation, and governance framework.

Key Milestones

