

INVEST SMARTER. LIVE BETTER.

# CAPITALVESTS INVESTOR PRESENTATION

CapitalVest: The Future of Investing Subtitle: Blending Behavioral Science  
with Quantitative Strategy

[www.capitalvests.com](http://www.capitalvests.com)





# THE GREATEST THREAT TO RETURNS IS YOU (HUMAN BIAS)

- **Panic Selling:** Exiting the market at the low point (Fear).
- **FOMO Buying:** Entering the market at the high point (Greed).
- **Understanding the Mindset Behind Each Investor Type**
- **The Reality:** Traditional platforms provide data, but offer zero defense against cognitive biases.

**The Gap:** Despite access to information, individual investors consistently underperform the market due to emotional decisions.

# INTRODUCING THE BEHAVIORAL-QUANT (B-Q) ENGINE

Definition: A proprietary, dual-layer investment framework designed to optimize asset allocation while enforcing investor discipline.



## The Quantitative Core (The Brain):

Dynamic, factor-based portfolio optimization.

## The Behavioral Shield (The Guardrail):

Science-backed tools to mitigate emotional trading.

Beyond providing capital, supportive investors can help accelerate growth, open market opportunities, and strengthen a company's credibility in competitive industries.

**Various Ways  
Investors Fund  
Startups**

# DYNAMIC PORTFOLIOS, NOT STATIC RULES



## ● **Adaptive Asset Allocation (AAA):**

Moves beyond fixed MPT. Our algorithms continuously monitor thousands of data inputs (macroeconomic, sentiment, volatility) to dynamically re-weight portfolio components.

## ● **Factor-Based Indexing:**

We target academically proven sources of return (Value, Momentum, Quality) instead of relying solely on market-cap weighting.

## ● **Machine Efficiency:**

Trades are executed and rebalanced based purely on optimized risk/return metrics, removing human latency and emotion.

# ENFORCING DISCIPLINE WITH DATA

- **Bias Detection:** Real-time monitoring of user activity (e.g., increased frequency of logins during dips) flags potential emotional trading events.
- **The Nudge System:** Instead of blocking trades, the system provides contextual, educational nudges (e.g., "Review your long-term goal probability before confirming this trade.")
- **Goal-Anchored Interface:** The primary measure of success is the Probability of Hitting Your Financial Goal, shifting focus away from daily portfolio value volatility.



Attracting the right investors means identifying partners who share our vision.



# BUILT ON TRUST AND ENTERPRISE ARCHITECTURE

**Security:** Industry-leading encryption (SSL/TLS) for data in transit and at rest; multi-factor authentication (MFA).

**Scalability:** Cloud-native infrastructure ensures seamless performance and high availability, even during extreme market volatility.

**Regulation:** Full compliance with KYC/AML regulations. Custody and brokerage services handled by regulated third-party partners.

**Backtesting:** Every B-Q model is rigorously backtested against decades of historical data for reliability and validation.

# CAPITALVEST VS. THE COMPETITION

| Feature               | Robo-Advisors (Traditional) | Self-Directed Brokerage | CapitalVest (B-Q Engine)            |
|-----------------------|-----------------------------|-------------------------|-------------------------------------|
| Portfolio Rebalancing | Static/Annual               | None (Manual)           | Dynamic/Adaptive                    |
| Bias Mitigation       | None                        | None                    | Integrated Behavioral Shield        |
| Fee Structure         | AUM Fee                     | Transaction Fee         | Transparent AUM Fee                 |
| Core Focus            | Low Cost                    | Execution Speed         | Risk-Adjusted & Disciplined Returns |

Beyond market factors, investors must also consider operational risks such management effectiveness, competitive pressures.



# INVEST SMARTER. LIVE BETTER.

Our Promise: CapitalVest helps investors close the performance gap created by human emotion.

**Request a live demo of the B-Q  
Engine in action.**



**Review our full White Paper for  
technical specifications.**

# TEAM BEHIND OUR INVESTOR

Our investor team consists of experienced professionals who bring expertise, strategic insight, and dedicated support to ensure successful partnerships and drive.



## **Experts Driving Investment Success**

Skilled Professionals Steering Investment



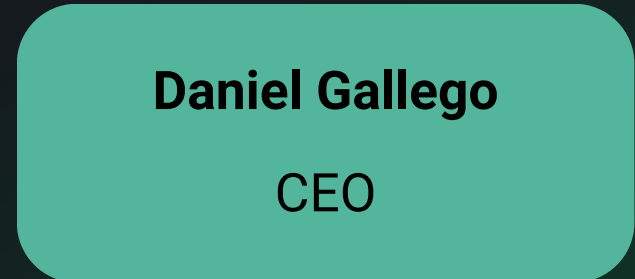
## **Our Dedicated Investor Relations Team**

Building Partnerships Through Transparent



**Juliana Silva**

Manager Finance



**Daniel Gallego**

CEO



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# THANK YOU FOR ATTENTION



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