

Leveling the quant playing field for independent investors



quantconnect.com Miami FL

Technology Software Fin Tech Finance Engineering

Highlights

- 1 📈 QuantConnect's award-winning platform trades over \$750M/mo, up 12.5x since 2018
- 2 📈 Reached \$1M in revenue (cash basis) in 2021 with 2.5x year-on-year growth
- 3 👤 1,500 paying clients and a community of 200k+ write over 1M lines of code each month
- 4 🌟 LEAN, our open-source framework, is in the top 0.4% on Github with 6,000+ stars
- 5 👤 LEAN features contributions from 150+ engineers
- 6 👤 Led by a passionate team of product and algorithmic software experts
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Our Team



Jared Broad CEO & Founder

A biomedical engineer with roots in product development and humanitarian consulting. 15+ years working with corporations and organizations to create community-enhancing software.

The world's top financial institutions operate in a system that favors the privileged few. QuantConnect solves this problem with a platform that empowers anyone with a brilliant idea to create quantitative trading strategies at just 1% of the cost.



Gustavo Aviles CXO

LEAD INVESTOR

Chris Kramvis Chief Investment Officer

I am investing in QuantConnect as Jared and his team have done a phenomenal job making quantitative trading software both accessible and affordable. I first joined the platform as an individual user in 2013, after a career in high frequency trading and have been developing and trading strategies on the platform ever since. In 2018 I started my own quantitative trading firm, DropShot Capital Management. The fund executes all of its live trading via the platform and we continue to expand our use of the cloud based services and data. DropShot has been a consistently top performer in the BarclayHedge Balanced Index. QuantConnect is uniquely positioned in the market and is a natural choice for startup quant firms and individual investors to get up and running quickly, without having to spend years building zero IP internal infrastructure. Jared and his team have also built and nurtured a fantastic community that further helps users and quickly calls attention to any needed features or upgrades. QuantConnect's overall potential is massive. It has the ability to capture the individual trader market but it also competes feature wise with products that cost 10's or 100's of thousands of dollars more and are only available to institutions. The product is a testament to both great development and the power of open source.

Invested \$25,000 this round



An industrial engineer self-taught in UX practices and tech. 10+ years as a developer and software engineer at QuantConnect and has built our entire UX from the ground up.



Martin Molinero CTO

A software engineer specializing in C++ language. 8+ years developing software for major tech corporations specializing in algorithmic modeling challenges.

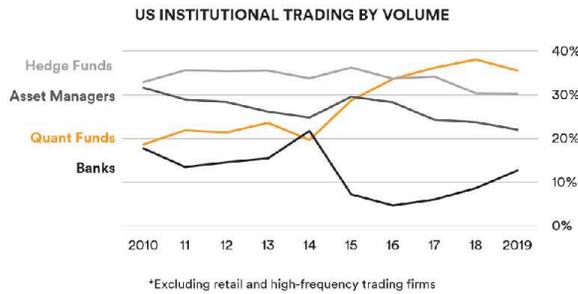
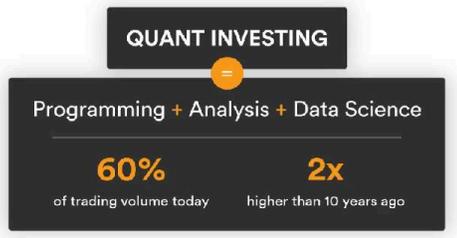


Alex Catarino Quant Team Lead

A core community team member since 2015. 7+ years as a quantitative developer, we initially reached out to contribute Bovespa backtesting to LEAN.

QuantConnect levels the playing field by making quant investing simple, affordable, and accessible.

Quant trading is the most common way to invest.



With the right tools, the right data, and the right knowledge, anyone can learn to create and trade with quantitative strategies. The result is a more level playing field and an overall healthier market where everyone benefits.

But, quant investing is impossibly hard for most investors.

Quantitative trading is complicated, costly, and unattainable. Tech barriers to setting up a quant system are high, SIP data feeds cost \$15,000-20,000+ per month, and education opportunities are limited and expensive.



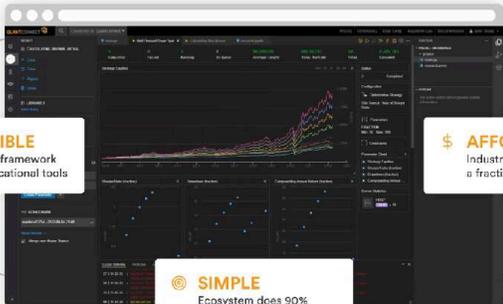
Born out of a desire to give people with brilliant ideas worldwide access to more opportunities – QuantConnect is making quant investing a true meritocracy.

In the quant world, investors live or die based on the success of their ideas, their trading, and their models. But, top funds that hold exclusive access to tools, platforms, and systems limit their client rosters to ultra-high net worth individuals – leaving independent investors to fend for themselves.

QUANTCONNECT

Democratizing finance since 2012.

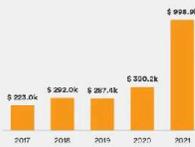
We are making quant investing simple, affordable, and accessible with an ecosystem that handles 90% of the complicated math and data processing.



Equities Futures Options Forex Index Crypto

- ACCESSIBLE**
Open source framework with free educational tools
- AFFORDABLE**
Industry-leading tools at a fraction of the cost
- SIMPLE**
Ecosystem does 90% of the boring heavy lifting

QuantConnect users trade over \$750M in live volume and write 1M lines of code, every month. We have over 1,500 paying clients and reached \$1M in revenue (cash basis) in 2021 with 2.5x year-on-year growth. More than 99% of all site traffic is organic and from word-of-mouth referrals.

| <p>SINCE LAUNCH IN 2014</p> <ul style="list-style-type: none"> \$7M+ funding raised \$1M ARR in 2021 2.5x YoY growth | <ul style="list-style-type: none"> \$750M volume/mo 1,500 paying clients 1M lines of code/mo 99% of traffic is organic | <p>LARGEST CLIENT</p> <p>\$1.4B AUM ETF firm</p>  | <p>5-YR HISTORICAL REVENUES</p>  <table border="1"> <tr><th>Year</th><th>Revenue</th></tr> <tr><td>2017</td><td>\$ 203.0k</td></tr> <tr><td>2018</td><td>\$ 292.0k</td></tr> <tr><td>2019</td><td>\$ 287.4k</td></tr> <tr><td>2020</td><td>\$ 300.2k</td></tr> <tr><td>2021</td><td>\$ 998.9k</td></tr> </table> | Year | Revenue | 2017 | \$ 203.0k | 2018 | \$ 292.0k | 2019 | \$ 287.4k | 2020 | \$ 300.2k | 2021 | \$ 998.9k |
|---|--|--|--|------|---------|------|-----------|------|-----------|------|-----------|------|-----------|------|-----------|
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 We offer industry-leading tools at 1% of the cost that institutions are paying.

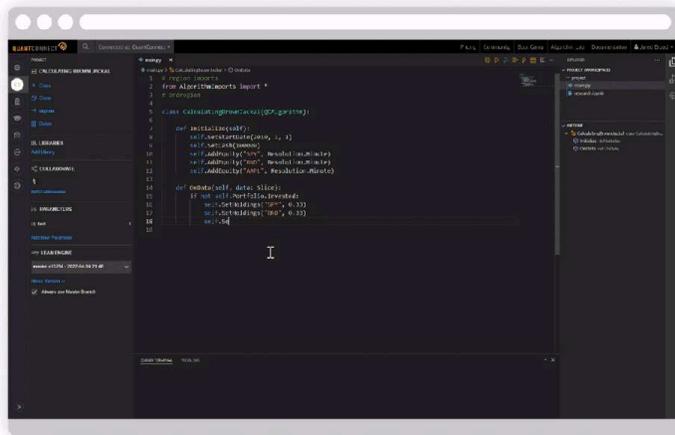
| | DATA | RESEARCH | BACKTESTING | LIVE TRADING |
|---|---|----------|-------------|--|
| QUANTCONNECT  |  | | | |
| Bloomberg |  | | | QUANTCONNECT PRICING \$336 User / Year |
| aws FinSpace |  | | | COMPETITOR PRICING |
| beacon |  | | | |

Our end-to-end ecosystem super-charges every part of a quant team. This includes everything from onboarding and training, to scaling a cloud infrastructure, and even preparing and maintaining datasets. Lastly, our system also helps perform analysis, run back-testing, and can also execute live trades.



Our platform empowers quant traders to evolve at light speed.

QuantConnect handles all of the data plumbing and infrastructure so you can focus on what matters most without worrying about foundational systems. Data processing and connections, and brokerages are all there - all you need to do is dream and make your ideas a reality.



9 Asset classes supported with portfolio margin models



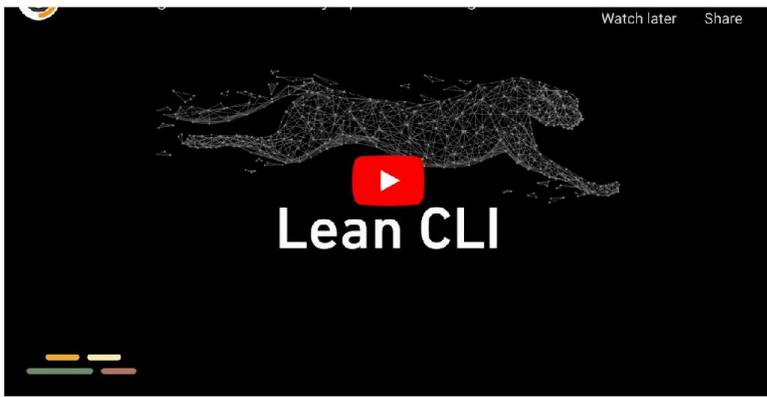
Research, Backtest, Optimize, and Live Trade



LEAN ingests hundreds of data streams from Reddit to futures

QuantConnect's open-source framework, LEAN, is in the top 0.4% of all GitHub projects with 6,000+ stars.

Our entire platform runs on LEAN, an open-source framework that anyone can learn to use thanks to our free educational tools and courses.



LEAN handles 90% of the heavy lifting, letting you focus on your strategy's secret sauce. Common challenges with quant trading are handled for you, and there is a large community of engineers familiar with the codebase.

| | |
|--|--|
| Deploy Algos Live Execute strategies on any of the 15 brokerages/exchanges supported or via popular order routers. | Easy Universe Selection Use predefined filters to search and filter through thousands of tradable assets; avoiding selection bias. |
| Cross-Asset Portfolios Simultaneously trade or analyze stocks, foreign currencies, futures, commodities, cryptos, and more. | Ultra-honest Backtesting Realistically simulate your strategy's historical performance and deploy the same code to live trading. |
| Multi-platform, Multi-lingual Integrate your tools by running LEAN from any environment imaginable while coding in C# or Python. | Tap Community Experience Feel confident in an open-source platform with over 150+ contributing engineers from around the world. |

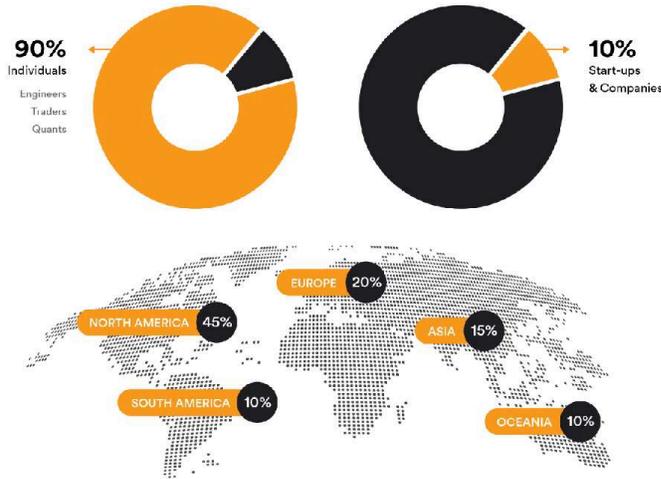
LEAN has more than 500,000 lines of code and was built over eight years with contributions from 160 engineers around the world.

- ✓ 6K GitHub Stars and contributions from 160+ engineers
- ✓ Open-source runs on-premise or in QuantConnect cloud
- ✓ Feature-set surpasses the world's top institutions

🌐 An active community of 200,000 quants and trading firms.

We're on a journey to power the next stage of open-source quant investing. Every week we see more businesses choose to start up on QuantConnect and LEAN. Our community is made up of sophisticated individuals and the next generation

of quant funds, from around the world.



As a company that is built on the shoulders of its 200,000+ community members, crowdfunding is the obvious next stage.



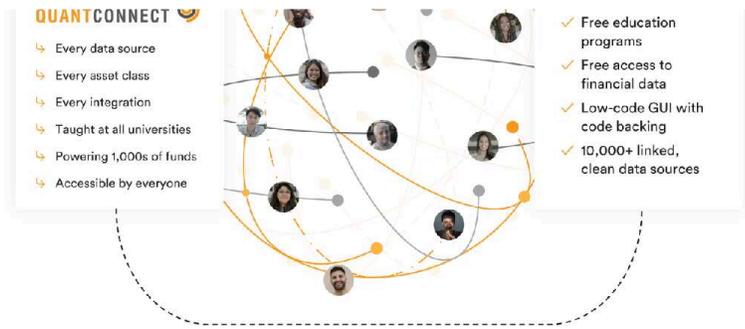
Our community means everything to us and we believe that the future of QuantConnect's success will depend on YOU. Leveling the playing field in investing won't just take a village, it will take a movement.

QuantConnect was built to help give millions of people with brilliant ideas a better shot at building wealth from the markets, it's only logical that we invite those same people to walk the path alongside us as investors.

QuantConnect will become the OS that underpins every investment on the planet.

Imagine this: by 2030, every brokerage in the world is integrated with LEAN, QuantConnect's fully open-source framework. Every integration you can think of was contributed by the open-source community and the brokerages themselves, saving developers years of wasted time reimplementing the same REST API plumbing.





In the future, QuantConnect will offer tens of thousands of datasets all updated in real-time. Datasets are easily installed with a single line of code virtually eliminating ETL (Exchange Transform Load) for every alt-data source in the world.

As our community library of code snippets grows, quants can prototype and test even faster than before. A no-code quant strategy builder has enabled millions more to build, test, trade, and share their ideas.

Getting to tomorrow starts right now.



Forward-looking projections cannot be guaranteed.

Addressing a multi-billion-dollar market opportunity.

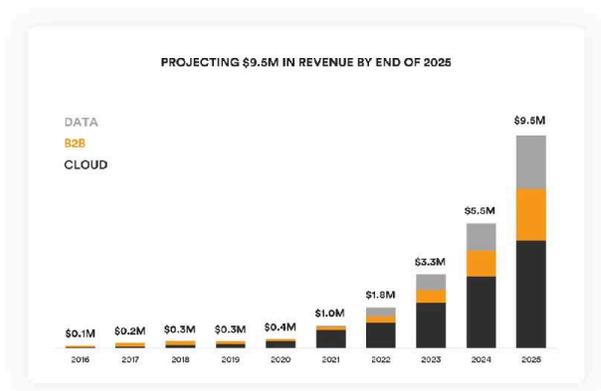
QuantConnect sits at the intersection of three major market opportunities.

- 1. Cloud Financial Analytics - Companies that seek to perform financial analysis in the cloud for faster research and lower overall costs (a \$100B global market in 2022)
- 2. Financial Data - Firms that are regularly purchasing datasets for on-premise analysis (a \$37B global market in 2022)
- 3. Asset Management - Assisting users to raise assets and monetize strategies, earning a share of management fees (management fees totaled \$2.14T globally in 2022)



Forward-looking projections cannot be guaranteed.

We are projecting our revenues to increase seven-fold over the next three years as cloud infrastructure sales, on-premise data sales, and B2B partnerships continue to climb. When we've invested in our technology in the past, we've unlocked equally large bumps in revenue growth. Because of this, we will continue investing to make LEAN one of the world's top algorithmic trading platforms.



Forward-looking projections cannot be guaranteed.

Note the below projections are hypothetical and cannot be guaranteed.

Your investment will power the next stage of open-source quant investing.

Your investment will power the next stage of open-source quant investing. We aim to build and maintain the world's most advanced and comprehensive quantitative trading and investment data platform. Our ultimate goal is to raise \$5M entirely from our community.


Research and Development

Every single perk we are offering will ultimately help the entire community as a whole. Investors will be able to pick new datasets to be added, new brokerages to integrate with, and even add entirely new markets for the community to trade.

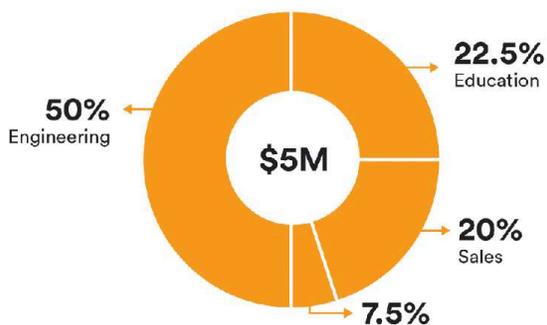

Education and Adoption

Education is a cornerstone of adoption and we want to continue to offer better ways to learn our tools. In addition to creating more Bootcamps, we'll create more tutorials, software development kits, and a college-level, accredited course.


Sales Process

Every day more than 2000 people visit QuantConnect, and 100-200 are potential business clients for the platform. We believe this is a significant opportunity so we will improve our outreach and sales development process to better capture these organic leads.

We'll reserve 50% for research and development to improve QuantConnect and open-source as many brokerages and datasets as possible. We'll deploy 22.5% towards education to lower the barriers to becoming a quant and 20% toward improving our business sales processes.



👉 By investing in QuantConnect, you'll be able to directly impact the future of open-source quant investing.

Beyond just equity, we've got a series of tiered perks that investors can earn depending on their level of investment. These tiers are cumulative, which means you are entitled to more perks the more you invest. Moreover, the upgrades will be deployed to the LEAN open source project and QuantConnect Cloud. Ultimately, these perks benefit everyone in the community.

\$1,000 Tier

Get 1-hour consultation on trading with QuantConnect.

\$2,500 Tier

Complimentary access to QuantConnect Researcher Pack for a year - a \$600 value.

\$10,000 Tier

Complimentary access to QuantConnect Team Pack for two users for a year - a \$2,400 value - and receive a permanent shout-out in LEAN's source code.

\$25,000 Tier

Complimentary access to QuantConnect Trading Firm Pack for two users for a year - a \$6,720 value.

\$50,000 Tier

Choose a new brokerage to be added to the LEAN platform within 2 months.

\$100,000 Tier

Choose a new asset class in a US market for LEAN, and free download of five years historical US Equity trade and quote minute bar data - a \$14,000 value.

\$250,000 Tier

Select an entirely new market to add to QuantConnect, such as UK Equities Market with a dataset worth up to \$25,000 USD.



Preparing the investing world for tomorrow's quant needs.

- ✓ The world's #1 open sourced quant platform
- ✓ \$137B+ global quant and data opportunity today
- ✓ On track to underpin the entire investment universe



Jared Broad
CEO & Founder

Downloads

[QuantConnect Deck August 2022 2.pdf](#)