

Your friends' trades and portfolios at the tip of your fingers

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Highlights

- 1 Organically built a proof of concept to over 23,000 users with a 90% engagement rate within a year.
- 2 20% month-over-month growth rate for our user base
- 3 Raised \$171,000 in our pre-seed
- 4 Addressing a growing wealth gap and financial literacy with a SOM of 72 million.

Our Team



Kenneth Mooso CEO

The first content creator and proof of concept developer (e.i. business model), w/ over 12 years of industry experience, a former financial advisor at Merrill Lynch w/ over \$100 million in assets invested on behalf of clients.

My passion is in finance since I was a child. I chose a career in finance and decided to leave due to a large, growing wealth gap of younger adults being too intimidated by the stock market. As a team, we believe we

LEAD INVESTOR



Shaunt Sarkissian

PersonaFI has an excellent, focused management team, company, and platform. Ken and the team have the focus, resiliency, and acumen to execute on their mission, and make the company and platform a gamechanger in the democratization of investing and data. While many platforms have tried to achieve this, they have often been an wolf in sheeps clothing, or offered minimal in their value

can solve social inequalities by improving financial literacy for the masses.



Kevin Baize CTO

Leads in development and tech infrastructure with over 8 years of experience. A former Ph.D. candidate at Purdue and machine learning expert.



Don Eliezer Baize CPO

Supports lead in product development and roadmap with over 4 years of experience. A former Ph.D. candidate at Purdue, John Hopkins math finalist, and published in Math Journal.

SEE MORE

Pitch



INVESTING WITH TRANSPARENCY
PERSONAFI.CO
Q3 2021



PERSONAFI

OUR VISION

TO BUILD A **COMMUNITY** OF INVESTORS THAT LEAN ON EACH OTHER RATHER THAN THE FINANCIAL SYSTEM. WHERE INVESTORS SHARE INVESTMENTS AND PORTFOLIO ANALYSIS THUS, EMPOWERING MAIN STREET.

We aim to build a community that helps one another grow financially to the point where people are financially literate, prosperous, and independent.

PERSONAFI

THE CURRENT

THE CURRENT MODEL



- + 55% OF ADULTS INVEST IN THE STOCK MARKET COMPARED 65% OF ADULTS PRE-08* MARKET CRASH
- 🔗 70% OF MILLENNIALS KNOW THEY NEED TO BE MORE FINANCIALLY SECURE
- 👤 61% OF MILLENNIALS FOUND INVESTING SCARY AND INTIMIDATING
- 📞 50% OF MILLENNIALS KNOW THEY NEED TO START INVESTING



Due to the 08' financial crisis, millions are dissatisfied and tired of using banks for investment advice and/or management. Millions of younger adults, specifically millennials, have remained out of the market, equating to a growing wealth gap and lack of financial literacy.

PERSONAFI

THE PROBLEM

Wallstreetbets' Reddit Forum Faces Infighting, Hostile Takeover Accusations

- SINCE MARCH 2020, 20 MILLION NEW RETAIL INVESTORS ENTERED THE STOCK MARKET
- RETAIL INVESTORS ARE TIRED OF TRADITIONAL FINANCIAL INSTITUTIONS - THE GAMESTOP CRAZE/REDDIT REBELLION
- THERE IS A SURGE OF TRADING AND SOCIAL TRADING APPLICATION
- THE PENDING TRANSFER OF WEALTH FROM THE BABY BOOMER GENERATION WILL FLOW TO DIGITAL FOCUSED INVESTORS

The COVID-19 pandemic forced tens of millions of adults to remain home and many unable to work. Millennials and younger adults who once remained out of the stock market sought refuge through the financial markets.

While entering the market, these same younger adults who distrusted the investment firms turned to the ones they did trust, their peers! They used unconventional channels like Discord, Facebook, Reddit, and Telegram for financial research. However, these solutions provided minimal context and left novice investors to the volatility of short squeezes, pump and dumps, and cyclical market pullbacks.

As social investing is exploding with popularity, the lack of context needed for informed investment decisions remains. Soon these younger and new retail investors will be the recipients of the largest transfer of wealth from the baby boomers and older generations.

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THE SOLUTION-
PERSONAFI



DISCOVER INVESTMENTS
DISCOVER NEW INVESTMENTS, STRATEGIES, ASSETS
AND MORE THROUGH A COMMUNITY THAT SHARES



THEIR BEST PRACTICES

- PLAN AND TRADE WITH FRIENDS**
DEVELOP STRONGER RELATIONSHIPS WITH OTHERS BY HELPING EACH OTHER GROW AND BECOME MORE PROSPEROUS
- VERIFIED TRADE ALERTS**
KNOW WHEN OTHERS ARE GETTING IN OR OUT OF AN INVESTMENT

The PersonaFi solution supplies the ever-needed context that is absent from collaborative social media platforms by allowing users to discover other investments, strategies, thesis, and asset classes. At the same time, enhancing collaboration by verifying investors' trades. In other words, we're bringing transparency by ensuring people put their money where their mouth is. Thus we desire to provide the tools these young and novice retail investors need to access the greatest wealth creation machines of all time, the stock and crypto marketplaces.

PERSONAFI
THE PRODUCT
LAUNCHED PRIVATE BETA



- SIGN UP IS QUICK, EASY AND FREE**
- SECURELY CONNECT BROKERAGES TO APPLICATION**
- INVITE FRIENDS, FAMILY, AND SAVY INVESTORS TO YOUR NETWORK**
- GET NOTIFICATIONS ON YOUR FAVORITE FRIENDS AND TRADERS**

Our product makes it easy for our users to know when their network trades, what they buy, when they buy, when they sell, and what else others are doing. Therefore, our users are getting the entire picture that goes into making an investment or trade decision. They're able to get the entire perspective of one investor or tap into the collective knowledge of the masses.

PERSONAFI
**MULTI-PLATFORM
VALIDATED DATA**

PLATFORM AGNOSTIC – WORKS WITH ALL MAJOR STOCK AND CRYPTO PLATFORM SOURCES

- TD Ameritrade
- Robinhood
- Charles Schwab
- Binance
- Coinbase
- Etc.

CENTRALIZED USER TRADES AND PORTFOLIOS

COLLABORATE, REVIEW, ANALYZE, AND MONITIZE

VERIFIED NETWORK TRADES AND PORTFOLIOS



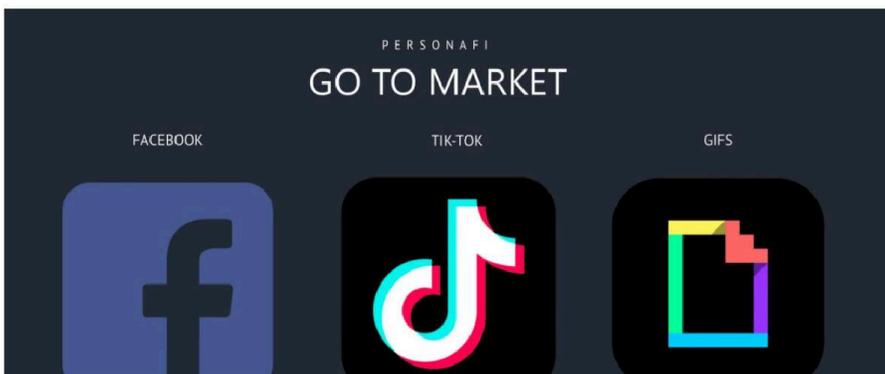
For our users, we've made our application platform agnostic, which means users can connect all of their accounts in one easy spot to view while allowing them to collaborate with any friend on any platform.



What separates us from other solutions and competitors is that we allow any of our users to be an analyst and share their wisdom in a verified collaborative manner. Therefore empowering our community further.



Based upon our research, we believe there are 72 million retail investors in the US alone that are self-directed investors, not wanting to work with asset managers or financial advisors, and are looking to be empowered in the financial markets.





Our rollout of the app will happen in phases. In the first phase, we'll be focused on user acquisition through our FB group, which has already surpassed 26k members. We estimate that 12-15k are Apple product users. Therefore reaching 10k by the end of July or August is within our scope. These projections cannot be guaranteed.

Our user bases' network effects coupled with content creation, micro-influencers, and our marketing pushing on TikTok will allow us to reach our next milestone of 20k users by October.

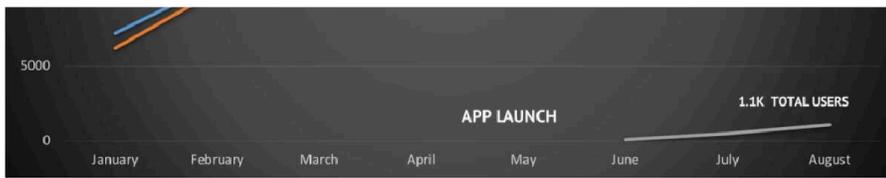
In the third phase, we will be rolling out the PersonaFi astronaut GIFs. Providing us ostentatious brand awareness in FB groups, Reddit, Stocktwits, Twitter, and eventually virality.



What separates us from the competition is the fact we allow any of our users to become an analyst. They can share their knowledge and empower their community. Furthermore, they can monetize their research and create premium content that provides more in-depth portfolio analysis and stock trade alerts.

As we scale to tens of millions of users, we plan to create monetized premium features like stock screeners and a PersonaFi ETF. Investors love to follow the broader market: we provide the means to follow the broader community and focus on long-term investing.





We've launched our app in private beta and are currently onboarding users gradually. While the app was in development, we scaled and proved our business model and concept through a FB group, newsletter, and text alert system. Within FB, we organically grew our community and user base to over 26k. From the group, we have over 1300 paying customers that subscribe to our team's premium analysis and trade alerts, generating over \$10k MRR and growing.



Your funding will be used mainly to onboard our current user base, launch to the public, and pay for feature build-outs. We believe that this will in turn help us reach our next milestone by the end of this year.

PERSONAFI
OUR TEAM

	<p>KEN MOOSO CEO</p>		<p>DONELIEZER BAIZE CPO CS PhD; 4 years dev</p>
	<p>KEVIN BAIZE II CTO CS PhD; 8 years dev</p>		<p>TERENCE DANIELS COO</p>

Our team is well-rounded with two top-in-class developers from prestigious computer science programs, a COO that has multiple years of experience working at startups, and finally, a CEO that has 12 years of industry experience and has amassed a social media following of over 23k in a year.

What makes our team uniquely qualified for this startup is our ability to create

professional investment content in a digestible manner for millions of retail investors.

PERSONAFI
ADVISORS



Eric Ries
Advisor



Shaunt Sarkissian
Advisor



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