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AI AND WEALTHTECH AS A SERVICE

For Wealth Managers and
Family Offices

MRR \$120K+

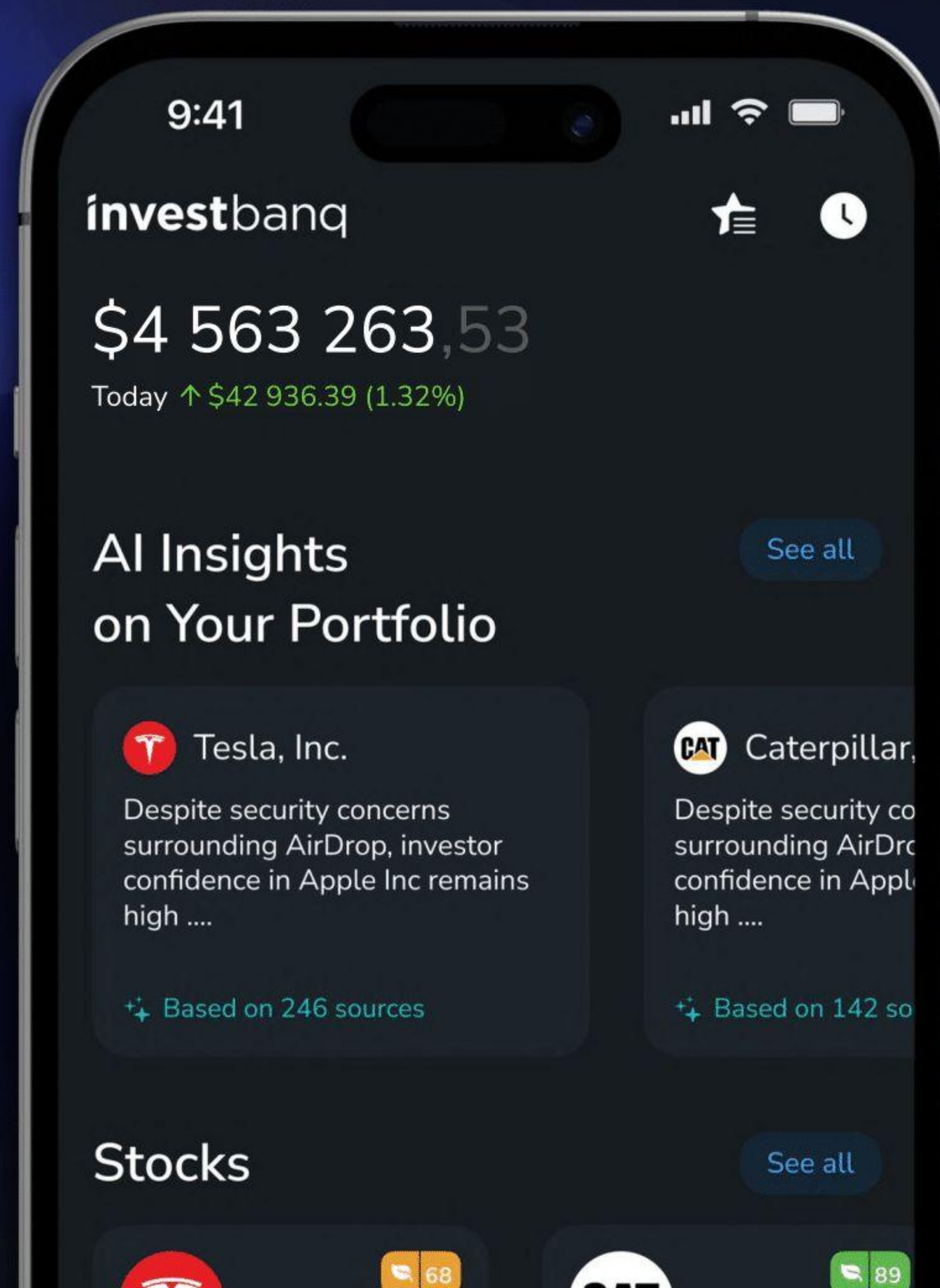
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B2B/B2B2C

 **nvidia**. Accelerated

Certified by **SFA** SINGAPORE
FINTECH
ASSOCIATION

EBRD portfolio company



Wealth is broken

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Outdated practices failing to meet client expectations. The next generation of wealth holders expects digital, real-time solutions, but 80% of family offices still rely on Excel

Not inclusive

Affluent and HNWIs often lack access to premium wealth-building opportunities. Most wealth platforms cater to either retail investors or the ultra-rich, leaving the "missing middle" of affluent investors and family offices underserved

Facing a Kodak moment

Traditional players are having a hard time capturing rising wealthy millennials as customers, as only 15%-20% of them are being served by wealth managers

What if wealth managers had an all-in-one platform to digitize and scale their operations?

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WealthOS platform

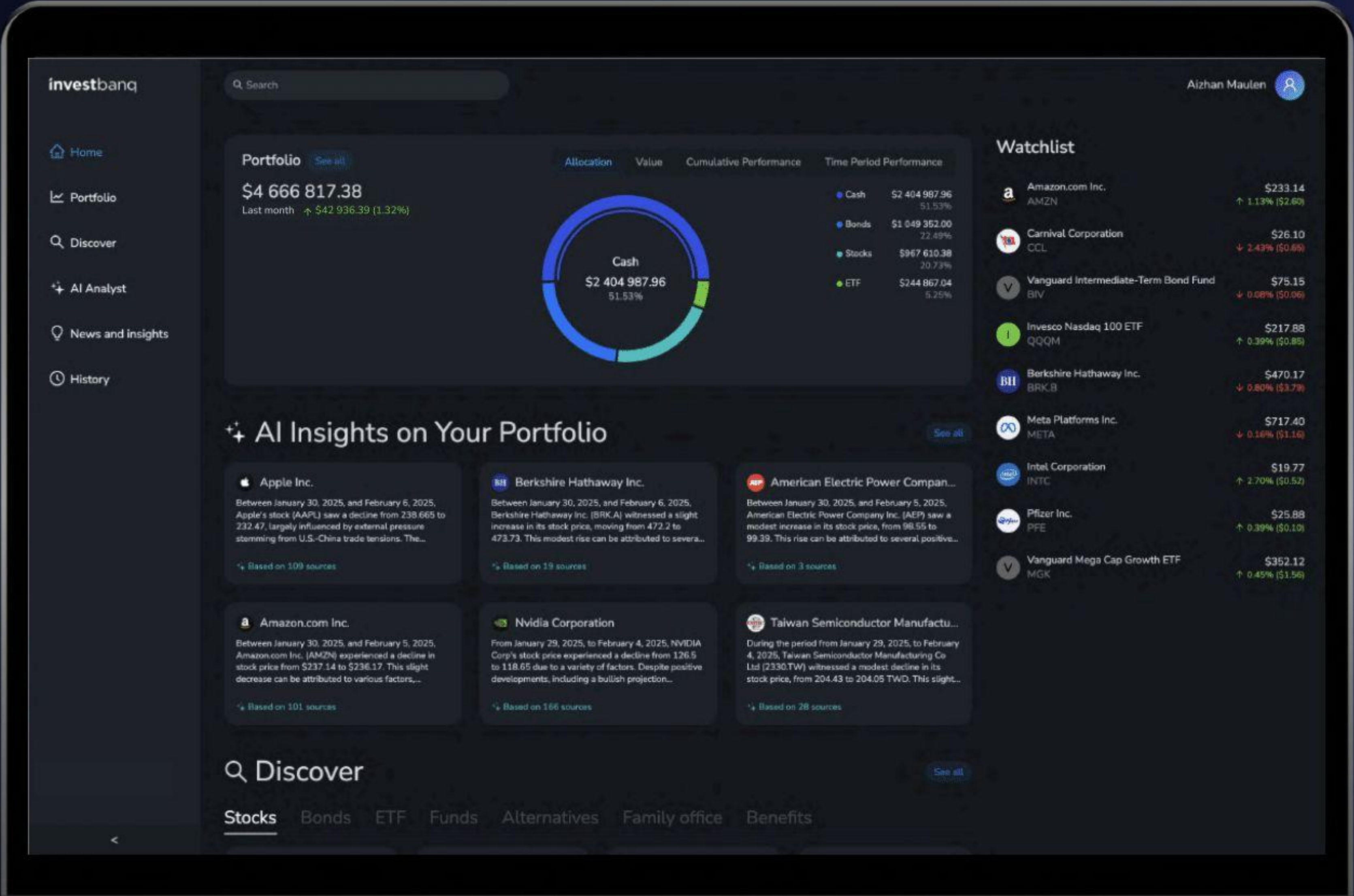
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Public and
non-public assets

WM dashboard

WM Co-Pilot

CRM for account
managers



BPMS
for compliance

Family office
solutions

Outsourced CIO
and traditional
advisory

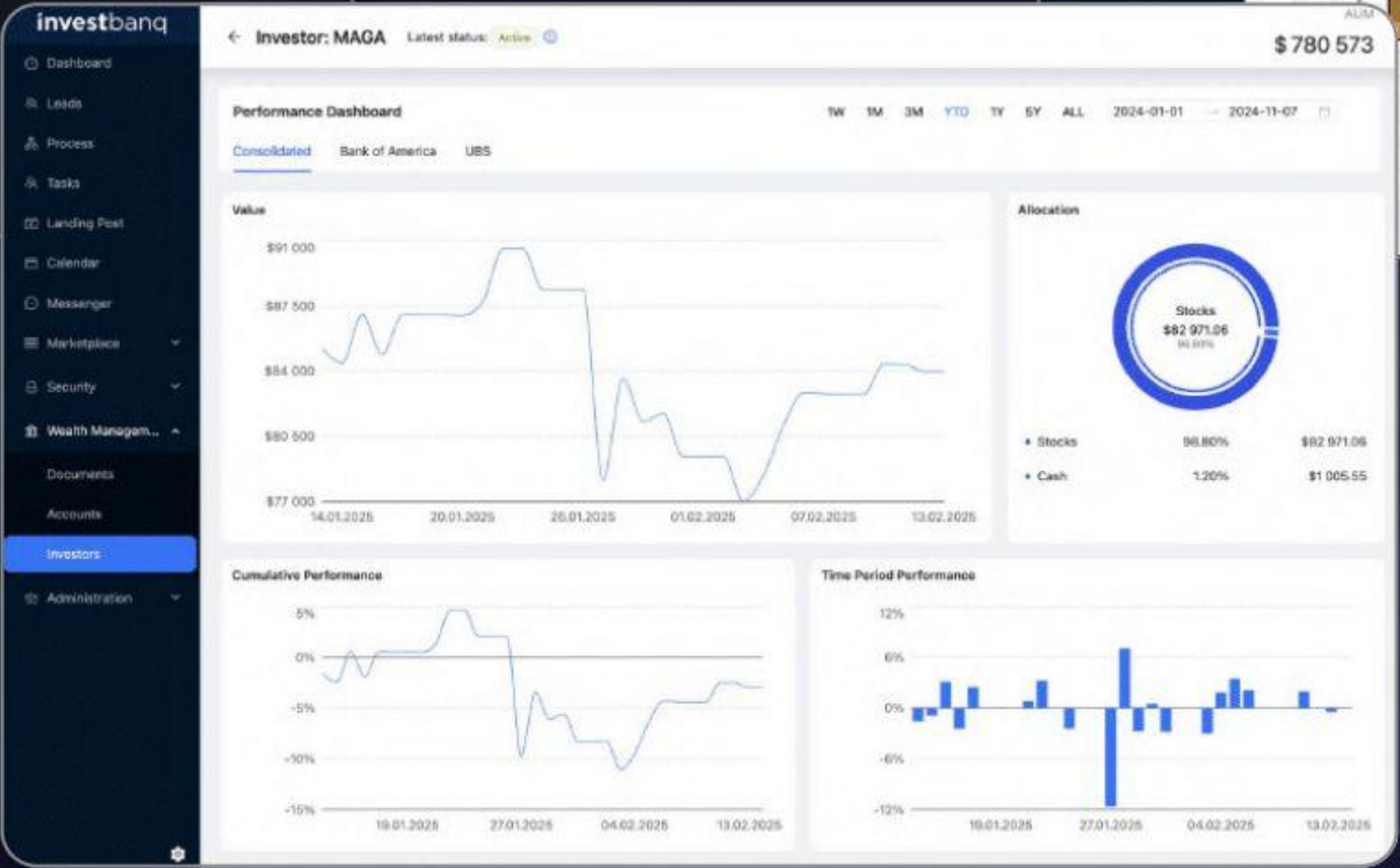
News and
research

Front, Mid and Back office tools

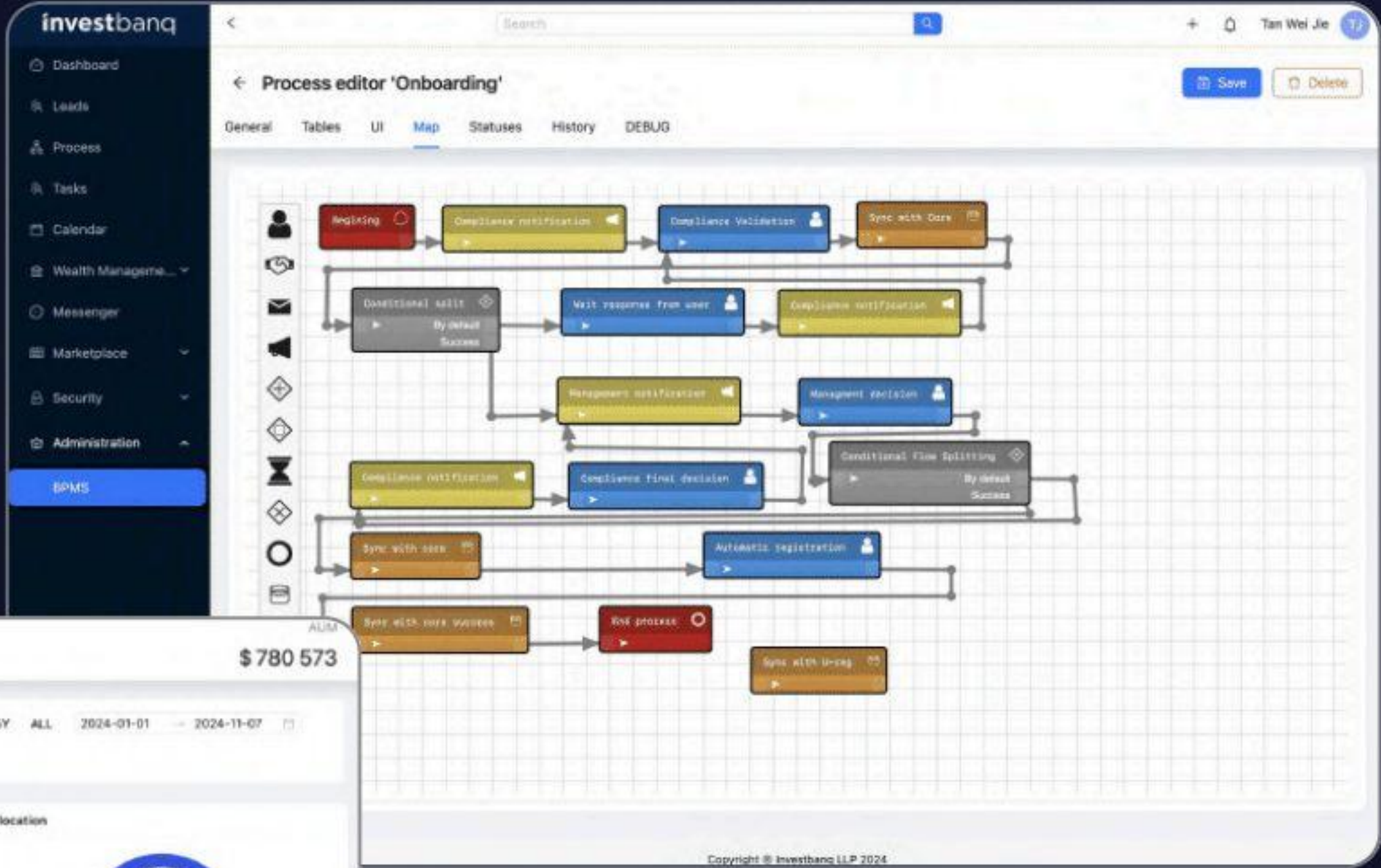
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Client Portal



Portfolio Dashboard



No-code BPMS

Wealth Manager (WM) Co-Pilot

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Search

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Home

Portfolio

Discover

AI Portfolio Builder

AI Analyst

News and insights

History

AI Portfolio Builder

Build Portfolio History

Amount you want to invest

\$1 700 000

Choose or measure your risk level

Measure my risk level

Conservative Low risk

Moderate Medium risk

Aggressive High risk

Very aggressive Very high risk

Expected Annual Return

-12% ... 22%

I want to customize my portfolio categories

Categories

Asset class	Country	Industry	Amount, USD	
Stocks	Singapore	Any	\$1 000 000	58.8%
Commodities	Any	Any	\$700 000	41.2%

+ Add a new row

Portfolio

Total amount

\$1 700 000

Risk level

Aggressive

Expected Annual Return

-12% ... 22%

Proceed

Although we have put considerable effort into developing investment portfolio construction tools and thoroughly testing the functionality of the AI Portfolio Builder product (the "Product"), it should be understood that the results provided are for informational and educational purposes only and should not be construed as the basis for making investment decisions.

We are not responsible for any losses caused by the use or inability to use information from our product. We recommend that you conduct your own analysis and seek professional advice before making decisions based on this information.

Portfolio Co-Pilot helps investors create and rebalance diversified portfolio consisting of a wide range of assets, precisely tailored to their individual risk profile and investment goals.

Analyst Co-Pilot leverages artificial intelligence to interpret fluctuations in security values by analyzing news trends and financial performance metrics.

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Search

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AI Insights: Your Portfolio's Last 7 Days

Although we strive to ensure the highest quality of our services by using pr... Show more

Apple Inc

\$216.73

2.17%

02 Jul 2024

Based on 122 sources

Analysis

During the period from June 25, 2024, to July 1, 2024, Apple Inc's stock price experienced a modest increase, rising from \$209.08 to \$216.75, marking a 3.67% gain. This rise can be attributed to several positive factors, including an optimistic earnings outlook driven by AI initiatives, a strong market position in China evidenced by a 40% increase in iPhone shipments, and favorable analyst upgrades which boosted investor confidence. The introduction of new AI features across Apple's product lineup has been particularly highlighted as a significant growth catalyst.

However, there are also some potential concerns that may dampen the stock's prospects. Regulatory challenges in Europe regarding Apple's App Store practices and human rights scrutiny related to Foxconn, a key supplier, have cast a shadow over the company's operational environment. Concerns about market over-reliance on a few large tech stocks, including

Show more

Taiwan Semiconductor Manufacturing Co Ltd

\$172.33

1.10%

02 Jul 2024

Based on 37 sources

Analysis

During the period from June 25 to July 1, 2024, Taiwan Semiconductor Manufacturing Co Ltd (TSMC) experienced a stock price increase from 170 to 172.33. This change can be attributed to multiple significant factors. Positive developments included strategic alliances that predict significant AI-driven revenue growth, bullish investor sentiment due to TSMC's crucial position in AI pipeline, and various approvals for expanding manufacturing facilities, indicating robust future growth prospects.

On the other hand, there were concerns raised about the limited benefits from AI growth due to its smaller fraction of overall revenue, projected price hikes amidst potential capacity issues, and minor stock price sinks despite the overall market performance. These aspects might have created some investor hesitancy but were overshadowed by the broader positive outlook based on strategic expansions and leadership in AI technology.

Overall, the stock price change reflects a balanced play between strong forward-looking growth opportunities in AI and broader semiconductor markets as well as minor setbacks due to operational and market risks. Investors were generally positive about the long-term prospects of TSMC, resulting in the gradual stock price increase.

Positive Developments

TSMC's stock was lifted to new all-time highs due to strategic alliances, with predictions of significant AI-driven revenue growth (newsId: 128540752).

TSMC received approval to inject additional investments to expand its manufacturing facilities in Japan and Arizona (newsId: 128513078).

Taiwan Semiconductor Manufacturing Co remains a key beneficiary of AI prosperity, driving bullish investor sentiment (newsId: 128432157).

Potential Concerns

TSMC's overall economics have shown limited benefits from AI growth given the smaller fraction of its total revenue it represents (newsId: 128432955).

Projected price hikes and potential capacity issues amidst bullish AI prospects posed concerns (newsId: 128526288).

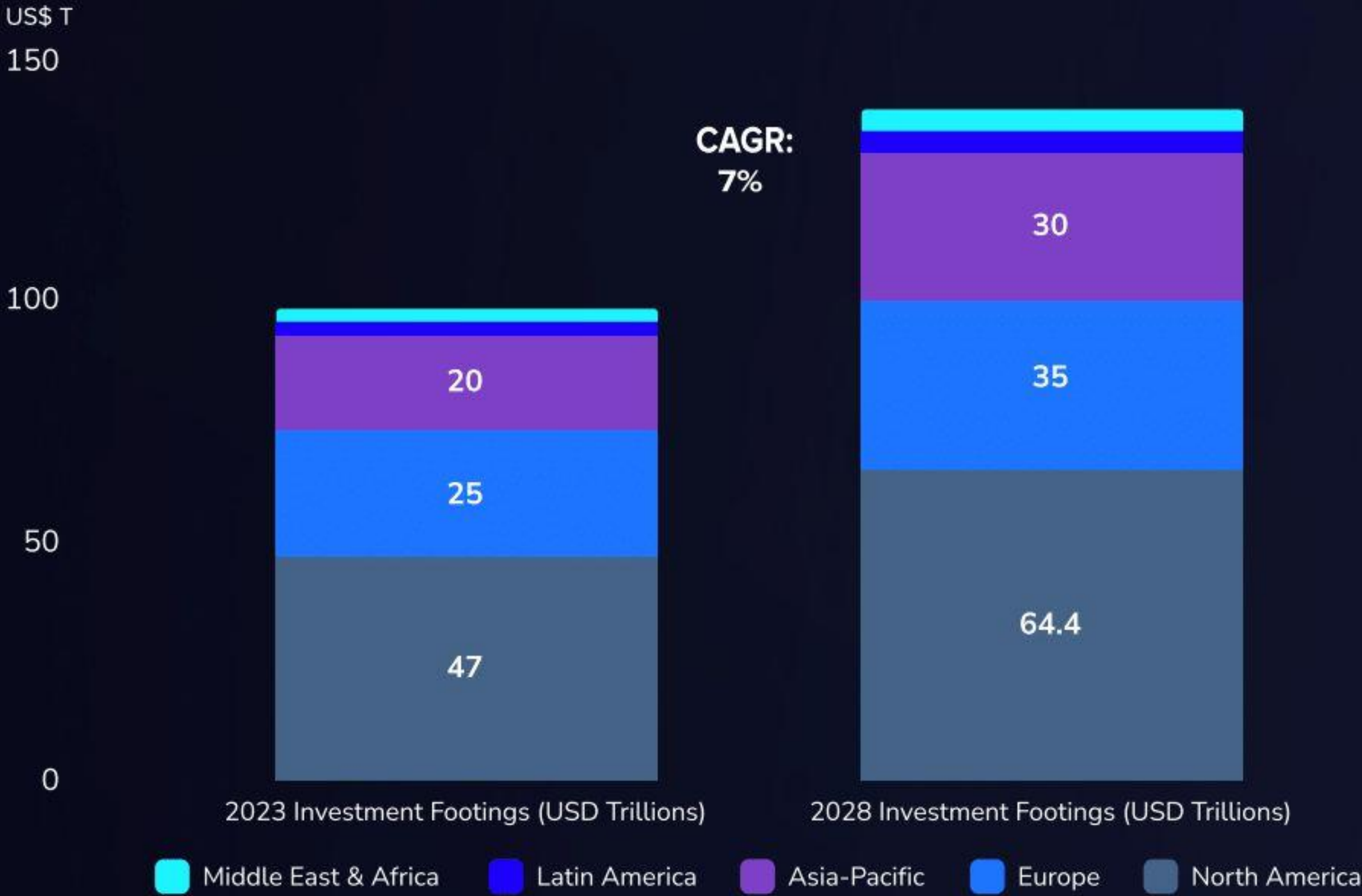
Despite overall market gains, TSMC experienced minor stock price sinks due to specific operational and market-related risks (newsId: 128498841).

Most Related Articles

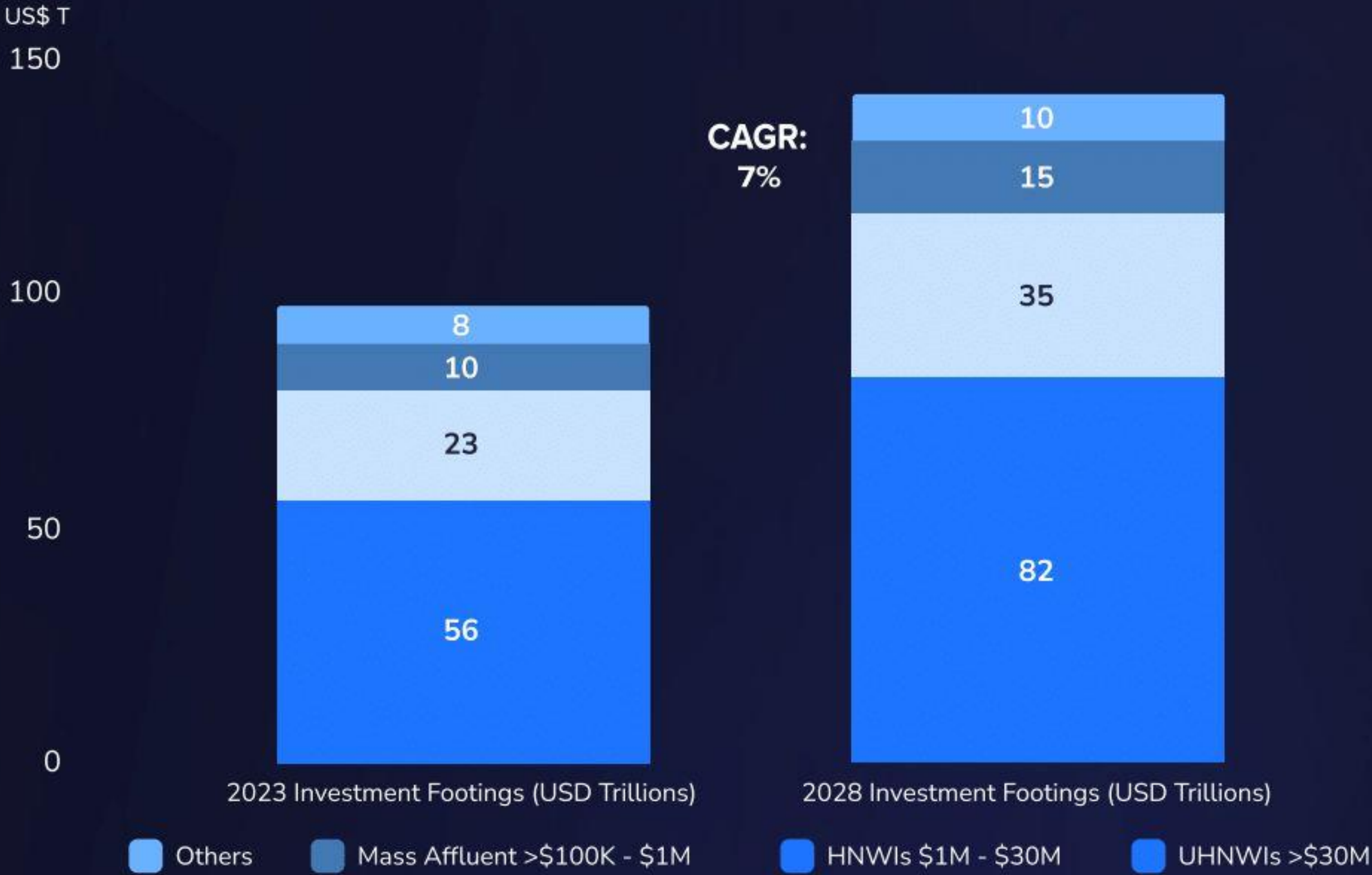
Global Wealth Growth by Region

Investment Footings are expected to grow by US\$40 trillion driven by UHNW and HNW

By Region



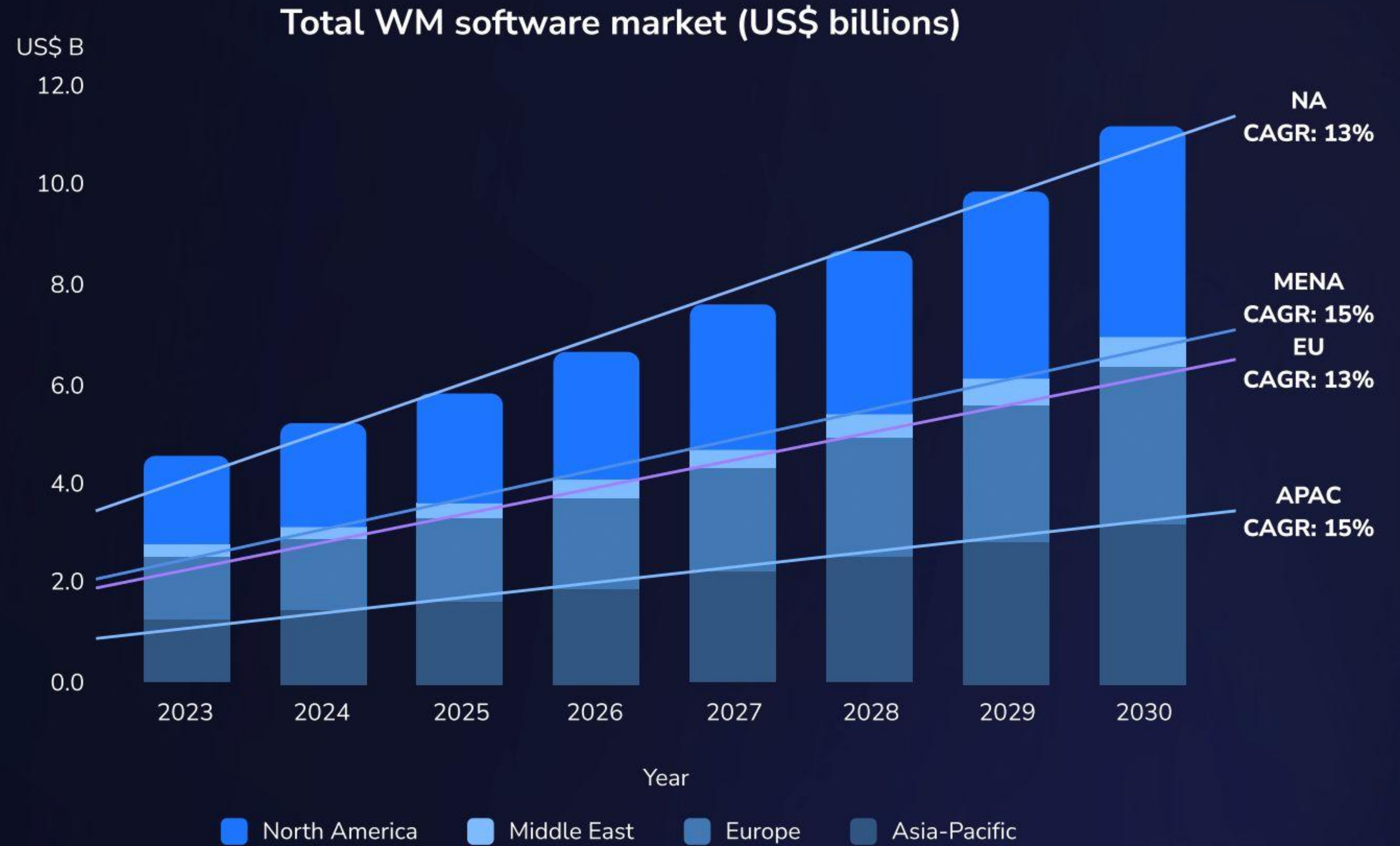
By Wealth Bracket



Total WM Software Market Size (Global)

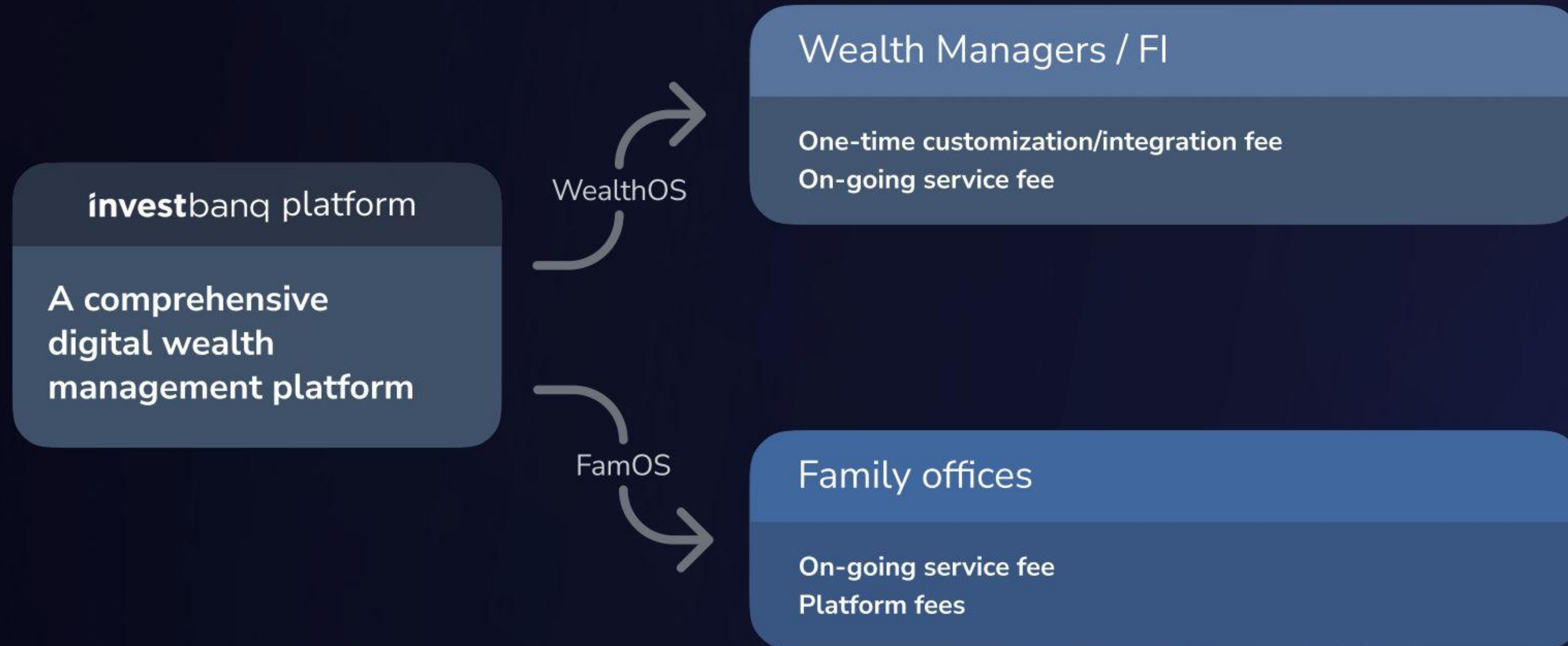
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WM software spend is expected to grow 2X from \$6B in 2023 to \$12B in 2030 led by Banks and Investment Managers. Asia and MENA are expected to be the fastest growing regions



Business model

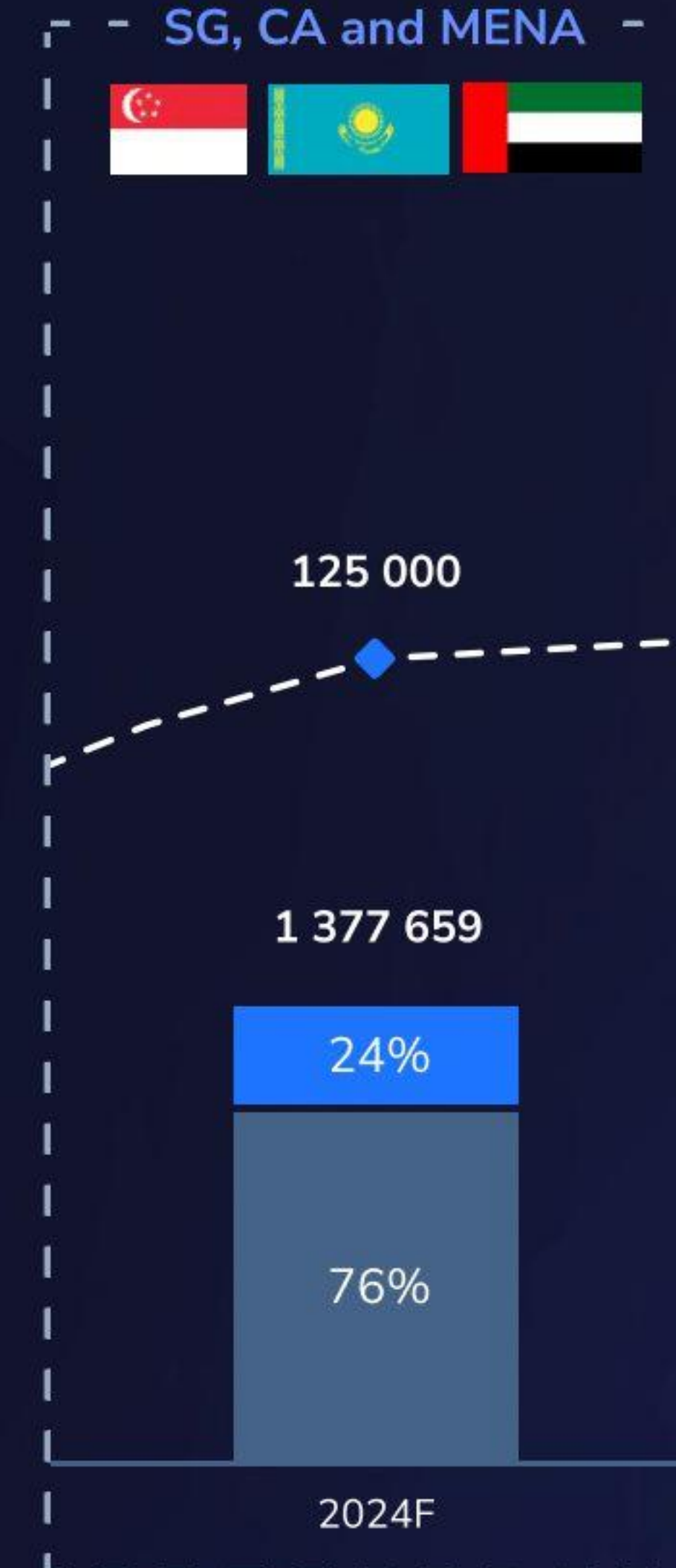
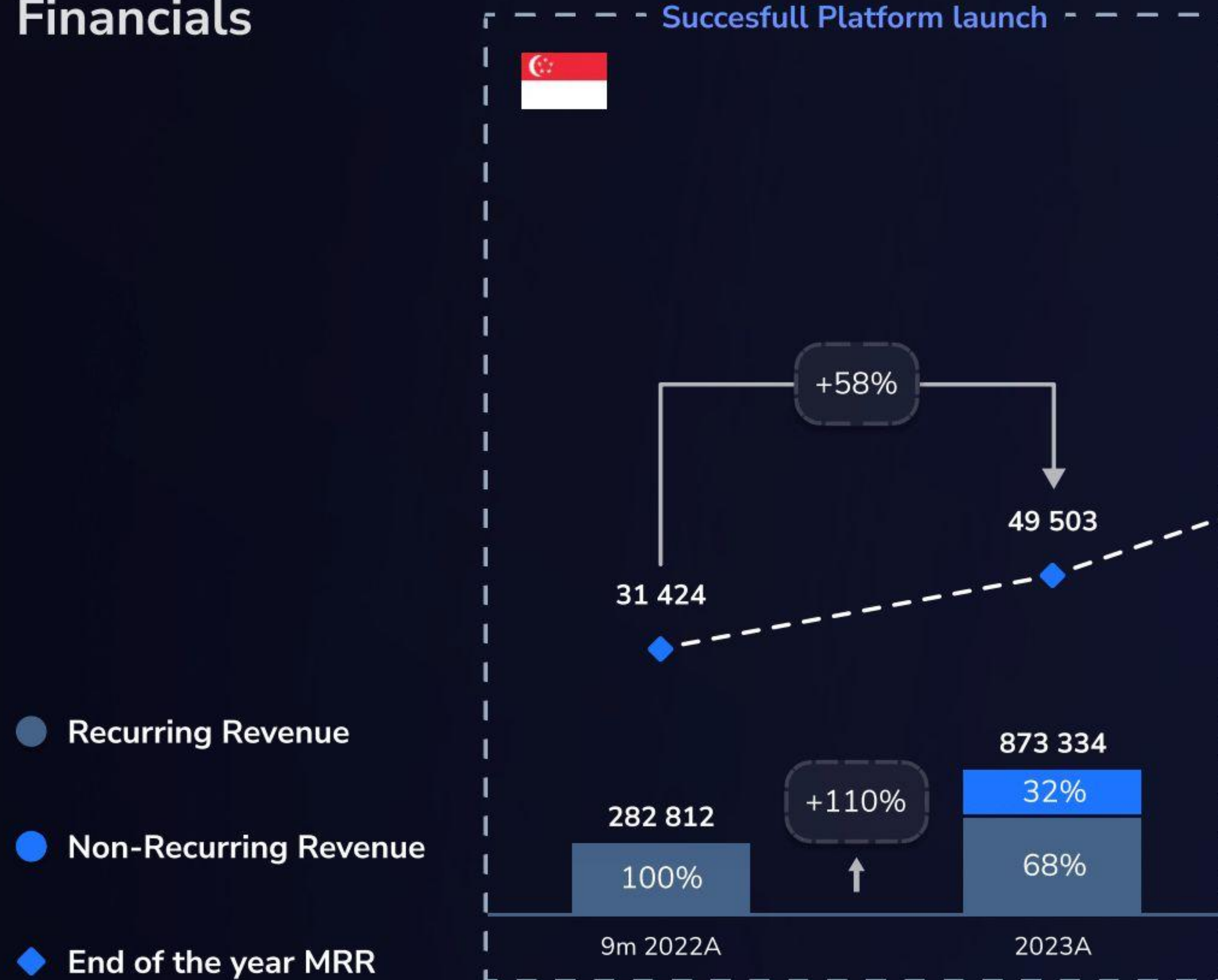
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Traction

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Financials



80%
Target gross
margin

\$120k
Current MRR

2 years
Path to
profitability

Competition

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	invest banq	avalobq	 Altruist	vega	 Alpheya
Founded	2022	1991 (Group)	2018	2022	2023
Location	Singapore	Zurich, Switzerland	LA, USA	London, UK	Abu Dhabi
Total Funding	\$3M	\$300M	\$450M	\$7M	\$300M
Valuation	\$18M (pre)	\$2B+	\$1.5B	\$40M	\$300M
Same Target Market	SG, CA and MENA	Partially	No	✗	Partially
No-Code BPMS	✓	Partially	Partially	✗	✓
Cloud Based	✓	✓	✓	✓	✓
360-degree reporting	✓	✓	Partially	Partially	Partially
AI Co-Pilot	✓	✗	✗	✓	✓

Team

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OZ
Co-Founder,
CEO



3 exits, 15 years of experience in asset management, brokerage, financial technology, investment strategy, insurance, compliance (certified CAMS)



TK
Co-Founder,
COO



ex-CFO of a large engineering company
ex-Investment Officer at a large PE fund, ex-PWC



Sergey
CTO



ex-CTO at Saxo Bank and core team member at Kx Systems a top software provider. 15+ years in IT and project management



+

30 amazing individuals across 3 geographies

Our backers

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David Halpert
Seed investor, Advisor

Founder of Prince Street Capital, a specialist emerging, and frontier market asset management firm based in New York and Singapore. With 30 years of experience researching and investing in the developing world, David coined the term 'Digital Decolonization' - a new paradigm for assessing investments in emerging and frontier markets.



Serg Bell
Pre-series A investor via Constructor Capital

Is a Singaporean tech entrepreneur and investor. He has founded multiple high profile tech companies (including unicorns), number of venture funds and several science and education centers, including Constructor group (formerly known as SIT), Acronis (valued at 4B), Parallels (acquired by Corel), Virtuozzo (backed by Intel), Runa Capital, Terra. VC and Constructor Capital.



Aigazy Kussain
Seed investor, Advisor

Serial entrepreneur and ecosystem builder, owner and leader of one of the largest and most successful educational holdings in Kazakhstan overseeing some of the most prestigious universities and over 10000 students. Co-founder of one of the most technologically advanced copper mining projects in Kazakhstan. Founder of one of Kazakhstan's fastest growing agriculture groups.



Milan Reinartz
Pre-series A investor via Orvel VC

After two exits in the ad tech space, Milan founded Ascend Angles in 2021- a community that quickly became Singapore's largest founder-driven syndicate. He also serves as a Partner for Orvel Fund I.



Dr Jonathan Chang
Investor, Advisor

Dr Jonathan Chang is the CEO of Fintopia Indonesia, the country's leading micro lending digital platform. As a fintech unicorn, Fintopia Indonesia has facilitated over \$1.7 billion USD in unsecured micro loans mostly to the unbanked and underbanked. Dr Chang is also a public policy advisor, academic, and an award-winning researcher.



Adil Nurgozhin
Investor via Big Sky Capital VC

Founding Partner Big Sky Capital VC. Adil is dynamic and experienced professional with a unique blend of skills and experiences in the startup ecosystem and venture capital landscape. With a rich background in structuring, managing, and investing in startups, particularly in emerging market environments, Adil brings a comprehensive understanding of the complexities and opportunities in these areas.