GreenWall
research

Problem

Many investors face difficulties in interpreting and utilizing complex financial data to make informed investment decisions. Market movement and asset return predictions are often unreliable, primarily due to financial market volatility and human biases.

Managing investment portfolios is often a lengthy and complex process requiring significant resources. Manual errors and operational inefficiencies can lead to decision delays and high operational costs, reducing profit margins and increasing the risk of financial losses.

- **Complexity of Financial Data**

Financial data is often voluminous and complex, making it difficult for investors and portfolio managers to extract meaningful information promptly and accurately.

- **Human Bias in Decision-Making**

Investors are frequently subject to cognitive biases such as excessive optimism or pessimism, which can distort investment decisions and lead to suboptimal strategies.

- **Operational Inefficiencies**

Manual portfolio management increases the risk of human errors, which can cause delays in order execution and negatively impact margins

Our Solution

GreenWall Research utilizes machine learning to convert intricate financial data into actionable insights, empowering investors to make precise decisions.

Our platform leverages advanced machine learning models that learn from historical and real-time data to provide more reliable market and asset return predictions. Through automated portfolio management, GreenWall Research enhances operational efficiency, decreases manual errors, and cuts operational costs, ultimately boosting profitability and risk management.

- **Dashboard**

Developed with the goal of improving investment decisions through real-time data, machine learning for portfolio optimization, and predictive insights.

- **Insider Network**

It's a secure platform for financial professionals to share insights and ideas, enhancing decision-making.

- **API Solution**

We offer access to our advanced APIs designed to enable investors to develop and execute customized strategies.
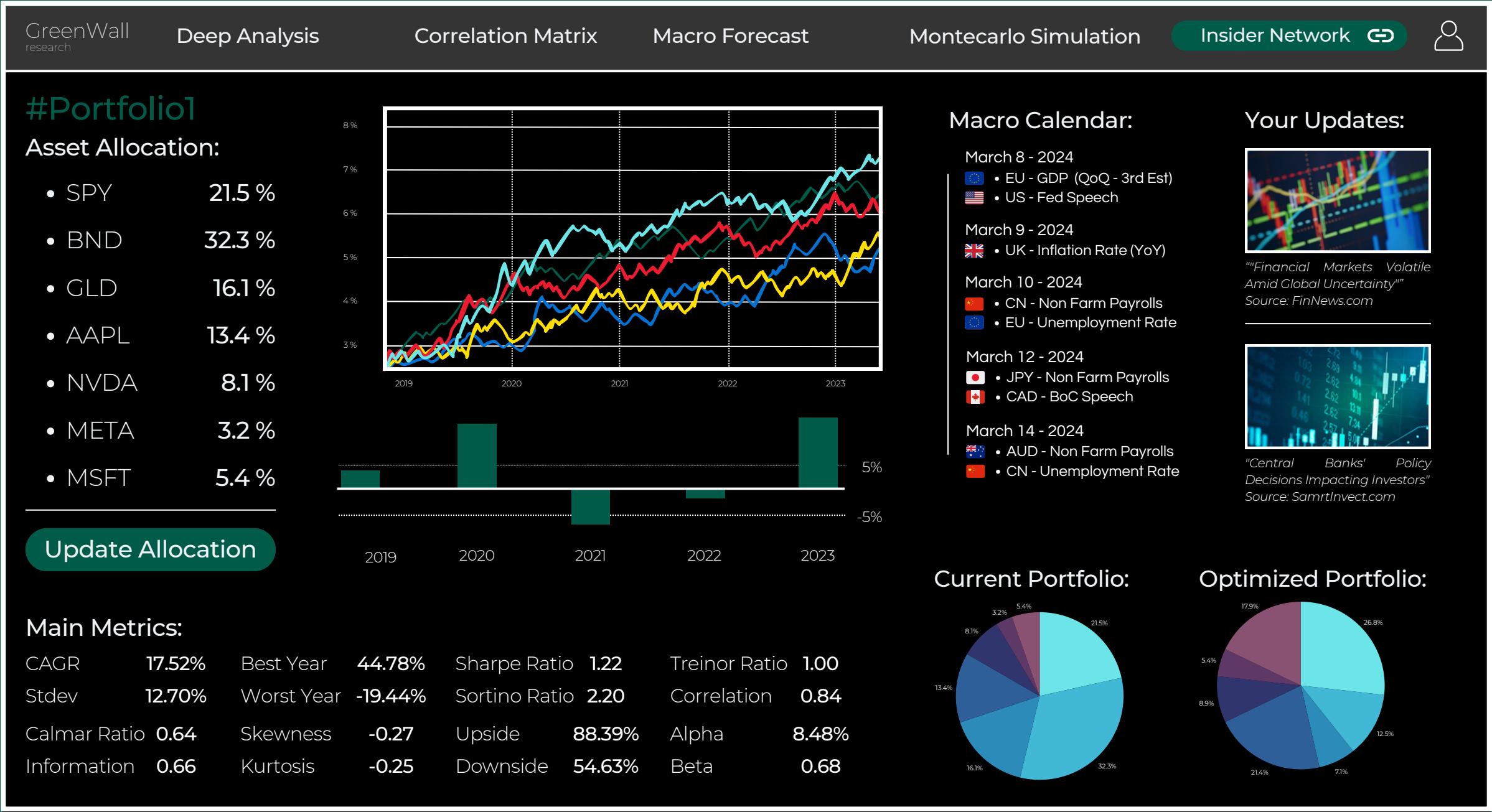
Dashboard

Macroeconomic Calendar

Asset Allocation

News Feed

Portfolio Metrics

Optimized Allocation

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Deep Analysis   Correlation Matrix   Macro Forecast   Montecarlo Simulation   Insider Network 🔗

#Portfolio1

Asset Allocation:

- SPY   21.5 %
- BND   32.3 %
- GLD   16.1 %
- AAPL   13.4 %
- NVDA   8.1 %
- META   3.2 %
- MSFT   5.4 %

Update Allocation

Macro Calendar:

March 8 - 2024
- 🇪🇺 • EU - GDP (QoQ - 3rd Est)
- 🇺🇸 • US - Fed Speech

March 9 - 2024
- 🇬🇧 • UK - Inflation Rate (YoY)

March 10 - 2024
- 🇨🇳 • CN - Non Farm Payrolls
- 🇪🇺 • EU - Unemployment Rate

March 12 - 2024
- 🇯🇵 • JPY - Non Farm Payrolls
- 🇨🇦 • CAD - BoC Speech

March 14 - 2024
- 🇦🇺 • AUD - Non Farm Payrolls
- 🇨🇳 • CN - Unemployment Rate

Your Updates:

""Financial Markets Volatile Amid Global Uncertainty""
Source: FinNews.com

"Central Banks' Policy Decisions Impacting Investors"
Source: SamrtInvect.com

Main Metrics:

CAGR	17.52%	Best Year	44.78%	Sharpe Ratio	1.22	Treinor Ratio	1.00
Stdev	12.70%	Worst Year	-19.44%	Sortino Ratio	2.20	Correlation	0.84
Calmar Ratio	0.64	Skewness	-0.27	Upside	88.39%	Alpha	8.48%
Information	0.66	Kurtosis	-0.25	Downside	54.63%	Beta	0.68

Current Portfolio:

Optimized Portfolio:

Architecture

Asset Manager

Portfolio 1

Portfolio 2

Portfolio 3

Insider Network

Advanced Analysis

Risk Profiling

Efficient Frontier

Monte Carlo SIM

News Clustering

Reporting

Forecasting Model

Forward Testing

Optimization

Insider Network

Insider Network facilitates seamless collaboration among finance professionals by providing a centralized platform for discussion and information exchange. Professionals can engage in discussions anonymously, fostering a candid and open dialogue without the constraints of identity.

By leveraging the collective wisdom of its diverse user base, Insider Network provides valuable insights and perspectives that empower professionals to make informed investment decisions.

⌘K \ Search by Topic

Featured Topics   **Most Recent**

StatisticaTrader
2 hours ago.

What role does Bayesian infrence play in your approach to modeling financial time series data?

Tags: #AlgoTrading   #Quant   #TimeSeries

535 Respones   **218** Likes

FinanceWizard74
3 hours ago.

What methodologies do you use to validate the accuracy and robustness of your backtesting results?

Tags: #Maro   #Portoflio   #Backtesting

417 Respones   **184** Respones

🔗 Create a Post.

Key Activities

GreenWall Research offers various specialized services, each catering to specific investor needs: a real-time data dashboard with machine learning for portfolio optimization, the Insider Network for sharing insights anonymously, advanced APIs for customized strategies with precise news, and an exclusive consulting service for personalized investment guidance.

- **Forecasting:** We offer machine learning models to analyze historical data and generate reliable forecasts on market trends and asset returns**.**
- **Backtesting:** We define portfolio metrics to evaluate the historical performance of investment strategies, assessing their effectiveness.
- **Portfolio Optimization:** We implement deep learning algorithms to position portfolios on Markowitz's efficient frontier.
- **Algorithmic Strategies:** We develop customized quantitative investment strategies, providing services tailored to specific needs.
- **Discussion Forum:** We ensure an engaging environment for financial professionals to share insights and exchange ideas.
- **News and Data API:** We provide relevant news updates and financial data for advisors' decision-making processes.

Key Resources

Our commitment to excellence in financial analytics and data-driven solutions is supported by a robust array of key resources, strategically designed to foster innovation and drive client success.

These foundational resources collectively empower us to deliver sophisticated financial analytics solutions, ensuring our clients leverage informed decisions and gain strategic advantages.

Technological Resources

- **Advanced Analytical Software**: Empowers deep data analysis and modeling capabilities.
- **Machine Learning Algorithms**: Enhances predictive accuracy and decision support through advanced algorithms, enabling proactive investment strategies.
- **API Integration:** Ensamble the development of predictive models to forecast future market behavior or asset performance.

Data Resources

- **Financial Databases**: Houses extensive repositories of diverse financial data sets critical for comprehensive analysis and strategic planning.
- **Intellectual Property:** Proprietary methodologies and algorithms developed in-house.

Why are We different?

- **Reduction of Human biases**

Algorithms and quantitative models minimize human error and emotional influence in investment decisions, ensuring greater consistency in strategy execution and improved long-term risk management.

- **Quantitative Approach**

Utilizing advanced quantitative analysis to identify optimal portfolio allocations and investment strategies based on rigorous statistical methods and historical data analysis.

- **Insider Network**

Insider Network is more than just a platform; it's a dynamic community where finance professionals come together to share knowledge, collaborate on ideas, and drive innovation in the world of investments.

- **Data-Driven Personalization**

We employ advanced clustering models to generate personalized investment profiles based on data, ensuring each user has a tailored portfolio that maximizes satisfaction and increases investment retention on our platform.

Competitor Analysis

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- Strategy Backtesting
- Portfolio Optimization
- Monte Carlo Simulation
- Asset Allocation Analysis
- Ratings and Evaluations
- Market Data
- Research and Analysis
- Reporting Tools

Proprietary Tools:
- **Forecasting Model**
- **Portofolio Projection**
- **Investment Strategies**
- **News Clustering**
- **API Integration**

MORNINGSTAR® | Advisor Workstation

- -
- -
- -
- Asset Allocation Analysis
- Ratings and Evaluations
- Market Data
- Research and Analysis
- Reporting Tools

PORTFOLIO VISUALIZER

- Strategy Backtesting
- Portfolio Optimization
- Monte Carlo Simulation
- Asset Allocation Analysis
- -
- -
- -
- -

- **Forward-Looking Investment Tools**

While many competitors offer tools that primarily describe and explain past portfolio movements, our goal is to provide a suite of forward-looking tools that help investors model expectations and predict future market movements.

Market Trend

Integrating predictive models into wealth management software would improve decision-making by accurately interpreting complex financial data for informed investment choices in uncertain contexts.

This improves portfolio management efficiency, reduces errors, and allows timely decisions, maximizing investor returns and minimizing risks.
This integration also supports advisors in providing added value by leveraging advanced analytics to stay updated on financial systems.

- **Customer Preferences**

There is a clear trend towards personalized and tailor-made investment advice, reflected by a growing demand for comprehensive financial planning, robust investment strategies, and effective risk management solutions.

- **Market Trends**

Approximately 40% of wealth management firms and financial advisors are inclined to adopt advanced analytics and technology services. Quantitative development optimizes investment accuracy and enhances operational processes.

Target User

Financial Professionals
Advisors & Investors

They are looking for advanced quantitative analytics solutions to build customized portfolios and offer high-end advisory services to their high-net-worth clients.

The use of advanced analytical tools enables advisors to **overcome the limitations of outdated instruments** and the **lack of quantitative skills**, enhancing the quality of services offered and ensuring a solid network.
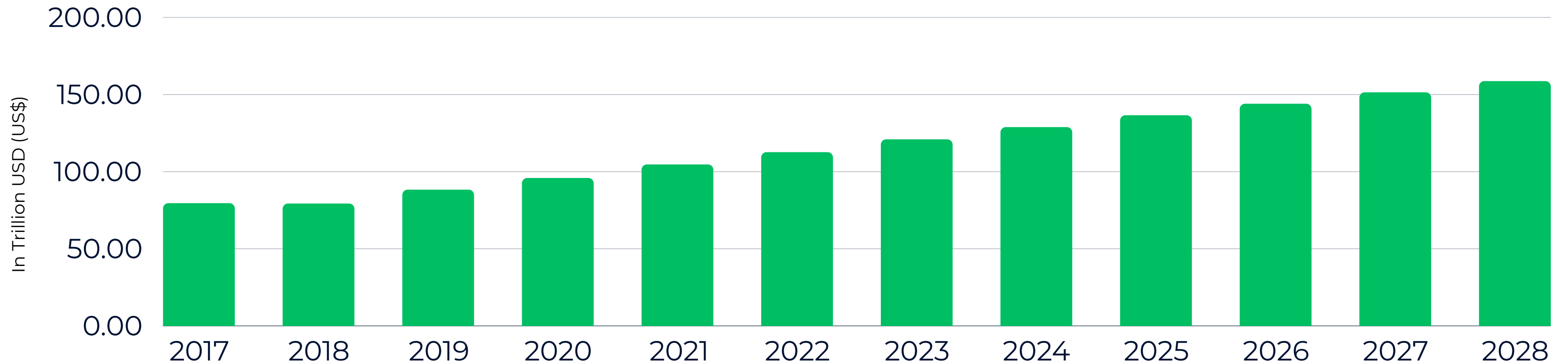
Wealth Management
Enterprise

Wealth managers firms can leverage advanced analysis tools and forecasting models capabilities to optimize client portfolios and improve investment performance.

We provide **advanced analytical tools** to allow wealth management firms to **reduce high R&D costs** and **adapt to market changes**, improving competitiveness and leveraging their deep market awareness.
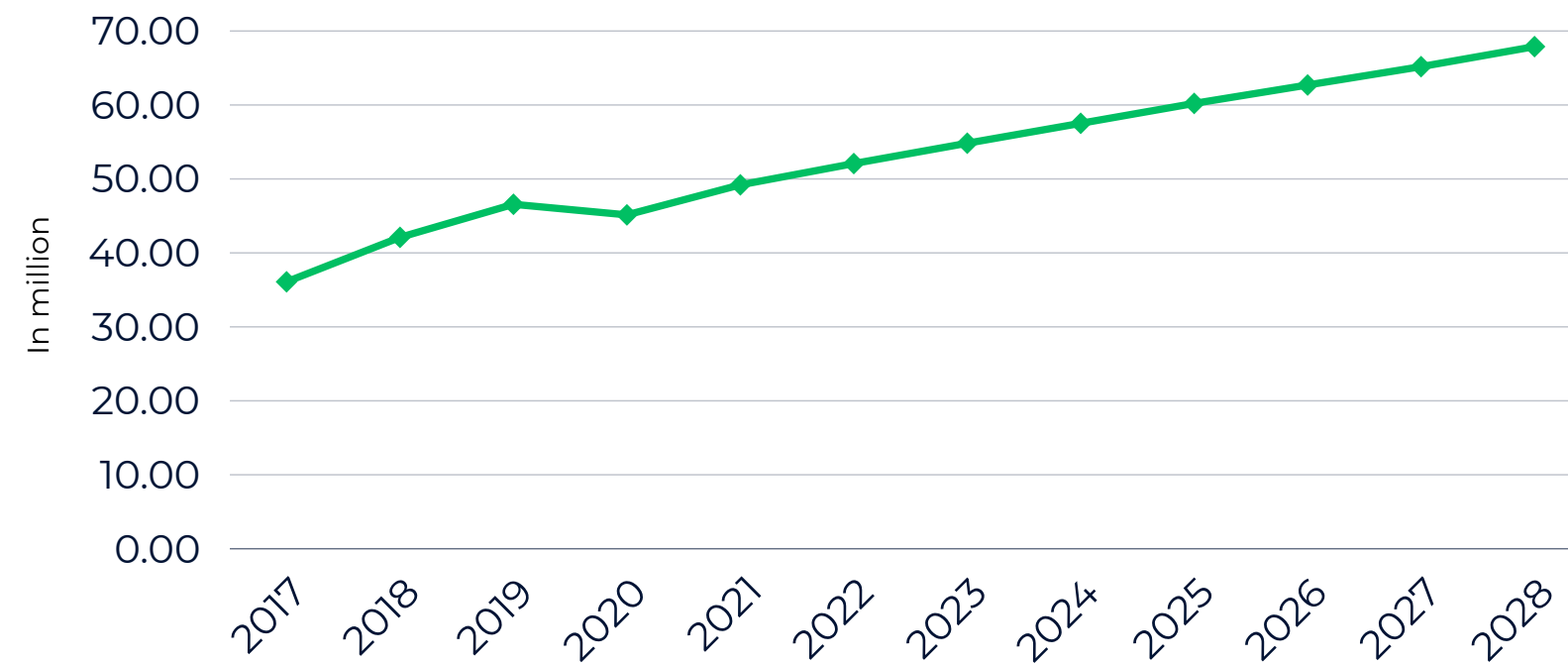
Wealth Management - Asset Under Management (AUM)

Total Addressable Market (TAM)

- **Estimate: $158.71 trillion by 2028**

This encompasses wealth management firms and financial advisors of all sizes who could potentially utilize our advanced analytics platform to enhance their client services. The projected **5.8% CAGR** from 2021 to 2028 in the global financial advisory services market indicates significant growth opportunities for our startup.
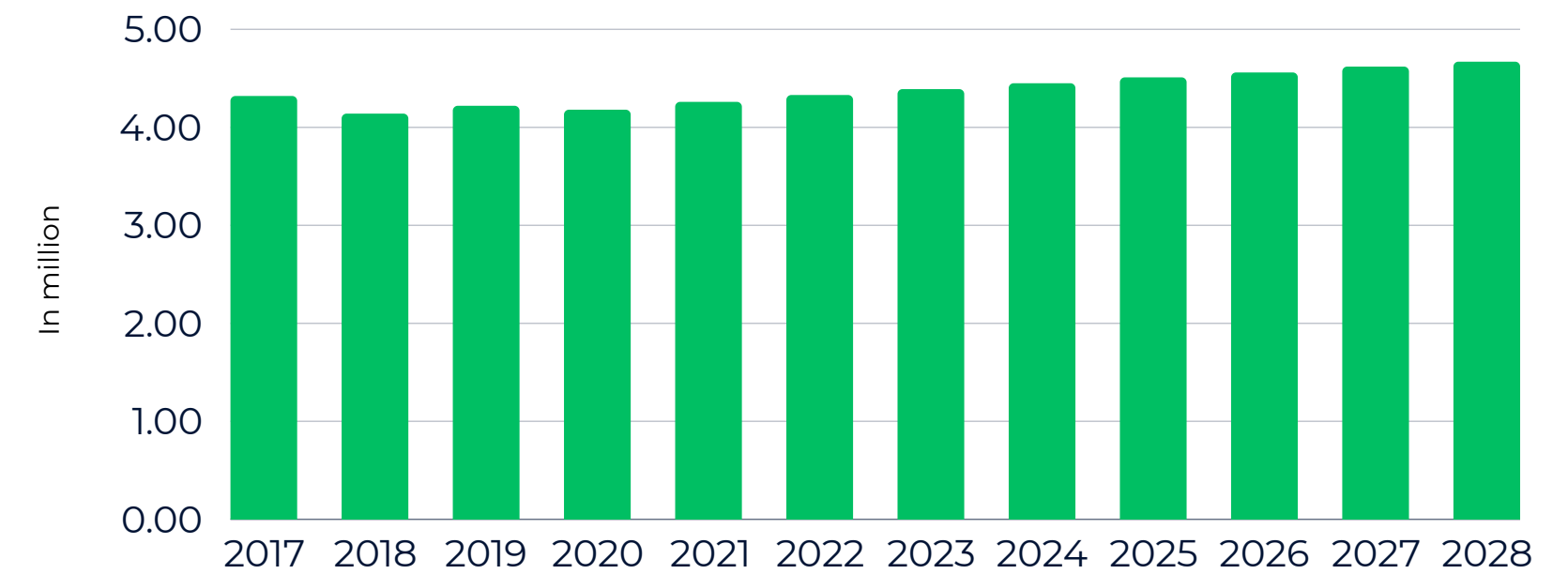
Wealth Management - Number of High-Net-Worth Individuals
Source: Statista.com

Wealth Management - Number of Financial Advisors
Source: Statista.com

Serviceable Addressable Market (SAM)

- **Estimate: $54.2 billion**

This encompasses wealth management firms and financial advisors of all sizes who could potentially utilize our advanced analytics platform to enhance their client services. The projected **5.8% CAGR** from 2017 to 2028 in the global financial advisory services market indicates significant growth opportunities for our startup.
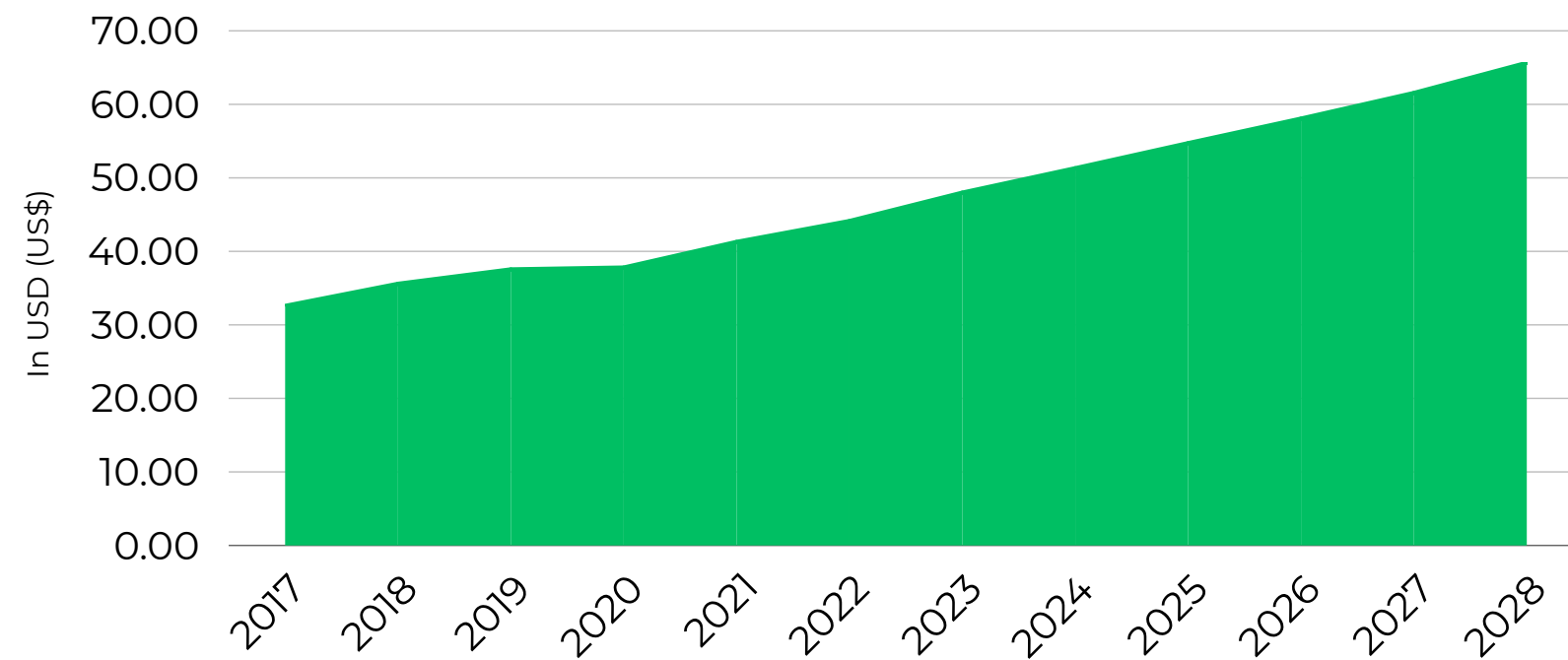
Serviceable Obtainable Market (SOM)

- **Estimate: $10.8 billion**

This includes 20% of large and mid-sized wealth management firms and financial advisors serving HNW and ultra-HNW clients, which our platform can realistically target and serve. These firms seek **advanced analytics solutions** to build personalized portfolios and provide high-end advisory services to their affluent clients.
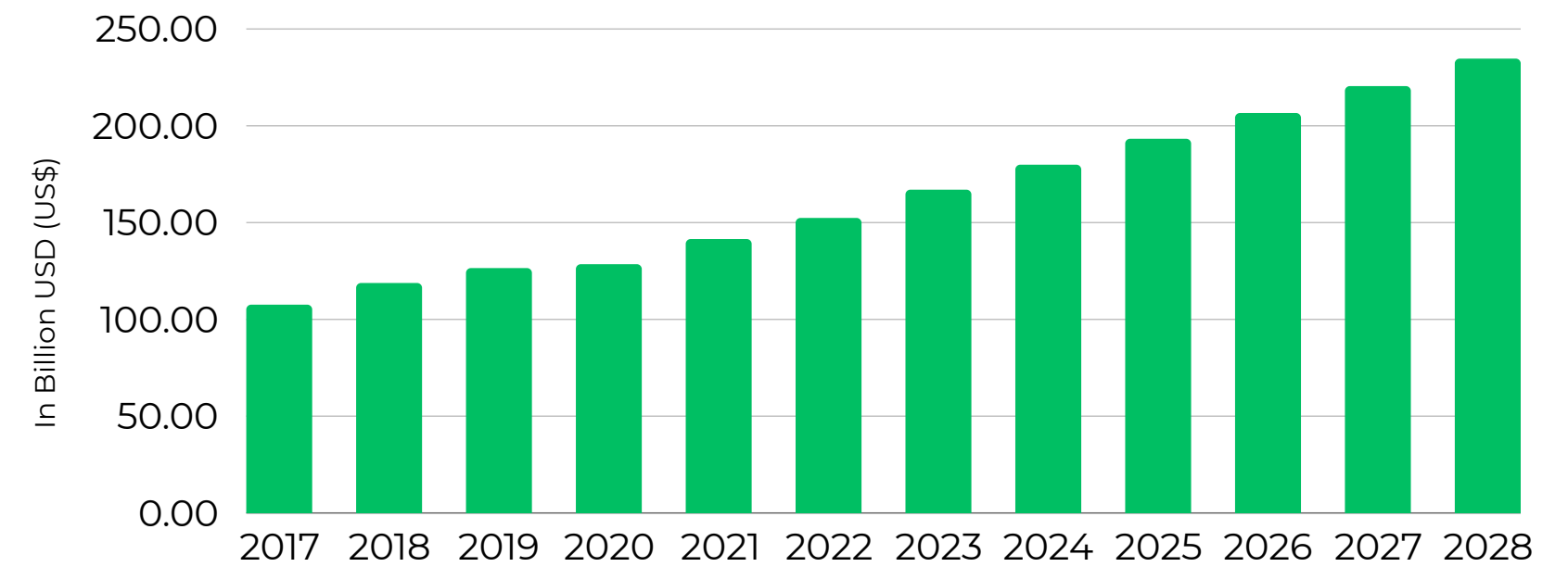
Application Development Software - AVRG Spend per Employee
Source: Statista.com

Application Development Software - Revenue
Source: Statista.com

Total Addressable Market (TAM)

- **Estimate: CAGR of 24.5%**

The TOM is estimated to grow at a CAGR of 24.5% from 2023 to 2028. This segment primarily includes large and mid-sized enterprises across various industries, such as finance, healthcare, and retail, that are likely to adopt this software solution to enhance their digital capabilities.

Serviceable Obtainable Market (SOM)

- **Estimate: $234.7 billion**

The SOM is estimated to be $234.7 billion by 2028. This includes 20% of large and mid-sized enterprises across various industries that can realistically target and serve with **advanced application development** software. These firms seek solutions that can help them build personalized applications and streamline operations.

Specific KPIs

To effectively track and measure our performance, we have identified a series of Key Performance Indicators (KPIs).

These KPIs provide crucial insights into various aspects of our business, including financial health, platform usage, customer acquisition and satisfaction, platform performance, and marketing effectiveness.

Financial KPIs

- Monthly Recurring Revenue (MRR):   **$20,000 - $50,00**
- Annual Recurring Revenue (ARR):   **$240,000 - $600,000**
- Customer Acquisition Cost (CAC):   **$500 - $1,000**
- Customer Lifetime Value (CLTV):   **$1,500 - $10,000**
- Gross Margin: **70% - 90%**

Marketing KPIs

- Marketing Qualified Leads (MQLs):   **200 - 500 (*month*)**
- Cost Per Lead (CPL):   **$50 - $200 (*lead*)**
- Return on Investment (ROI):   **200% - 500%**
- New Sign-ups: **50 - 150 (*month*)**
- Conversion Rate: **5% - 15%**
- Referral Rate: **10% - 30%**

Platform Usage KPIs

- Number of Active Users: **500 - 1,500**
- User Engagement Rate: **40 % - 70%**
- Average Session Duration: **10 min - 30 min**
- Feature Usage Rate: **50% - 80%**
- Churn Rate: **3% - 7% (*month*)**

Market S.W.O.T. Analysis

Strengths

- Advanced Proprietary Technologies
- Machine Learning Algorithms
- Strategic Partnerships

Weaknesses

- High R&D Expense
- Dependency on External Data

Opportunities

- Adoption of Digital Technologies
- Demand for Predictive Analytics Solutions

Threats

- Data Security and Privacy Risks
- Financial Market Volatility

User Interview

We've conducted an in-depth interview process to understand the diverse needs of users, ranging from novice to experienced investors. This has enabled us to analyze the effectiveness of our services and gather direct feedback from users. The aim is to ensure maximum user satisfaction and service robustness through ongoing evaluations and an iterative cycle of improvement.

Beta Tester, *Financial Advisor*

"The intuitive interface coupled with its comprehensive reports has significantly enhanced my ability to understand and assess my clients' risk profiles. This deeper understanding enables me to craft personalized investment strategies tailored to each client's financial objectives."

Beta Tester, *Experienced Investor*

"Thanks to its advanced tools and detailed data analysis, I can optimize my trading strategies more effectively. The platform provides me with a comprehensive overview of market trends and potential risks, enabling me to make more informed decisions and maximize my returns."

Beta Tester, *Quant Researcher*

"The platform provides me with quick and reliable access to detailed financial data and up-to-date macroeconomic forecasts. With its advanced tools for data analysis and model generation, I can conduct in-depth research and identify promising investment opportunities with greater precision and efficiency."

Key Partnership

By establishing strategic partnerships with brokers, wealth management firms, and financial advisors, we aim to deliver advanced analytical solutions tailored to the needs of our key partners. These collaborations will enable us to target our services effectively, ensuring that each partner can offer enhanced value to their clients, driving better investment decisions and portfolio performance.

- **Brokers**

Type: Service Offering Partner
Purpose: To provide brokers with advanced analytical services they can offer to their clients.
Goal: Enhance broker offerings with cutting-edge financial analysis

- **Wealth Management Firms**

Type: Solution Provider Partner
Purpose: To offer quantitative analysis solutions for portfolio management and investment strategy development.
Goal: Support in optimizing their portfolio management processes and crafting robust investment strategies through data-driven insights.
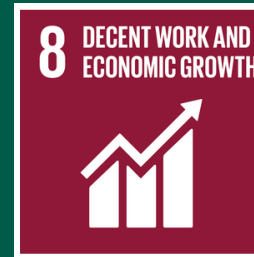
Positive Impact

Aligning our corporate mission with the United Nations' Agenda 2030 emphasizes our commitment to sustainability goals.

By integrating these principles into our business strategy, we aim to make a meaningful contribution towards a more sustainable future.

4 QUALITY EDUCATION

- **P4 - Quality Education**

Developing educational tools and resources on financial literacy and investment strategies.

8 DECENT WORK AND ECONOMIC GROWTH

- **P8 - Decent Work and Economic Growth**

Creating employment opportunities through technological innovation and partnerships.

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE

- **P9 - Industry, Innovation, and Infrastructure**

Enhancing financial technologies and infrastructure to support sustainable investment practices.

10 REDUCED INEQUALITIES

- **P10 - Reduced Inequalities**

Promoting gender parity access to financial services and ESG investment opportunities.

- **Carbon Neutrality**

For every subscription, we plant a tree, contributing to global reforestation efforts and offsetting our carbon footprint.

Roadmap

We are committed to continuous innovation and expansion to deliver even more value to our users. Our roadmap is a testament to our commitment to pushing the boundaries of quantitative investing.

Q1 - 2025

- Enhancement of Technological Infrastructure
- Advanced Algorithm and Model Development
- API Integration and Optimization

Q2 - 2025

- Expansion of Analytical Capabilities
- Strategic Collaborations
- Release of MVP (Minimum Viable Product)

Q3 - 2025

- Focus on R&D
- Operational Process Optimization
- Continuous Improvement Implementation

OUR TEAM

Aldo Jacopo Virno
Co-Founder

Advanced quantitative trader adept at designing complex trading strategies using statistical models and algorithms to analyze financial markets and uncover investment opportunities.

Luigi Monaco
Co-Founder

Experienced in macroeconomics and economic analysis, adept at utilizing advanced models to assess macro trends and provide insightful forecasts for informed decision-making in dynamic markets.

V. P. R.
COO

A tech expert specializing in Blockchain technology solutions, he has collaborated with leading national and international companies. Founded a Web3 startup focused on bridge and cross-chain solutions.

Matteo Esposito
CTO

Data analyst, adept at utilizing statistical and machine learning models for financial forecasts and risk-management.

Alessandro Irace
Back-End Developer

Expert in backend architecture and optimal technical solutions. Combines technological and economic experience to guide efficient investment in development.

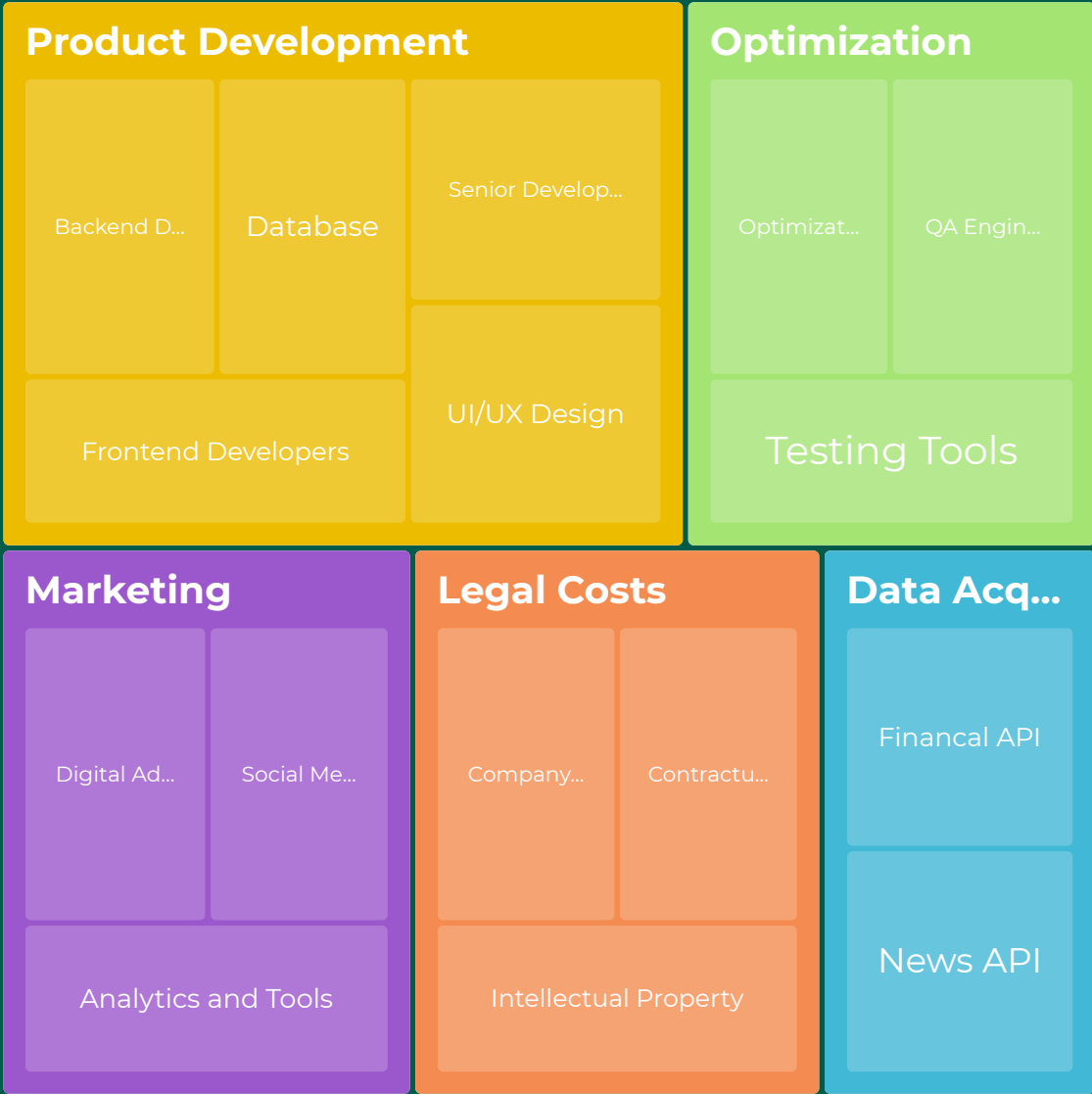**Davide Tarantino**
Front-End Developer

Full Stack Web Developer, passionate about development, responsible for developing the site's graphic interface.

Contact: info@greenwallresearch.com

Cost & Revenue Projection

Annual Cash Flow		Forecasting Period					
		Year 1		Year 2		Year 3	
Revenue							
Platform Subscription Plan	Analysis Platform (Billed Annualy: € 2.750,00)	€	82.500,00	€	165.000,00	€	247.500,00
Forecasting API	Proprietary API licence (Billed Annualy: € 1.500,00)	€	7.500,00	€	15.000,00	€	22.500,00
Backtesting API	Proprietary API licence (Billed Annualy: € 750,00)	€	11.250,00	€	22.500,00	€	33.750,00
News API	Proprietary API licence (Billed Annualy: € 540,00)	€	10.800,00	€	21.600,00	€	32.400,00
Brokers Partnership*	-	€	-	€	-	€	-
Newsletter Advertising*	-	€	-	€	-	€	-
Gross Revenue		€	**112.050,00**	€	**224.100,00**	€	**336.150,00**
Liabilities							
Back-end Development	Senior Developer	€	-15.000,00	€	-15.000,00	€	-15.000,00
Front-end Development	Senior Developer	€	-15.000,00	€	-15.000,00	€	-15.000,00
Database & Storage	Database maintenance	€	-5.000,00	€	-5.000,00	€	-5.000,00
	Storage	€	-10.000,00	€	-10.000,00	€	-10.000,00
Server Cloud	-	€	-10.000,00	€	-10.000,00	€	-10.000,00
Content Delivery Network (CDN)	-	€	-3.000,00	€	-3.000,00	€	-3.000,00
Security Audits	Annual safety audits	€	-10.000,00	€	-10.000,00	€	-10.000,00
SSL certificates	-	€	-500,00	€	-500,00	€	-500,00
Compliance	Legal advice and adjustments	€	-5.000,00	€	-5.000,00	€	-5.000,00
API integration	News API licence (Billed Monthly: $ 79,00)	€	-900,00	€	-900,00	€	-900,00
	Financial Data API Licence (Billed Annually)	€	-2.000,00	€	-2.000,00	€	-2.000,00
Marketing Tools	MailChimp (Billed Monthly: € 95,00)	€	-1.140,00	€	-1.140,00	€	-1.140,00
Total Direct Costs		€	**-77.540,00**	€	**-77.540,00**	€	**-77.540,00**
Gross Profit		€	**34.510,00**	€	**146.560,00**	€	**258.610,00**

Fundraising

Fundraising Projection		
Expense Category	**Description**	**Cost ($)**
Product Development		
Backend Developers	Senior Developer	€ 15.000,00
	Mid-Level Developer	€ 37.000,00
Database	Configuration and development	€ 5.000,00
Frontend Developers	Senior Developer	€ 15.000,00
	Mid-Level Developer	€ 35.000,00
UI/UX Design	Designer	€ 20.000,00
	Software (Figma, Adobe XD)	€ 1.200,00
Optimization		
QA Engineers	QA Engineer	€ 50.000,00
Testing Tools	Software Licenses (Selenium, Postman)	€ 1.500,00
Data Acquisition		
Financial API	Integration of financial data into company systems	€ 2.000,00
News API	Customized data solutions	€ 900,00
Marketing		
Digital Advertising	Paid digital advertising (Google Ads, Facebook Ads)	€ 7.000,00
Social Media Marketing	Social media management and advertising	€ 2.000,00
Analytics and Tools	Data analytics and monitoring tools	€ 1.000,00
Legal Costs		
Company Registration	Legal fees for entity formation and registration	€ 2.000,00
Contractual Agreements	Preparation of standard contracts	€ 1.500,00
Intellectual Property	Protection of trademarks, patents, copyrights	€ 1.500,00
Total Initial Development		**€ 197.600,00**

€ 194.700,00

Intiail Funding