

axis 

Business Plan

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1. Executive Summary

1.1. Overview & Mission

AXIS-Z is a Virtual Reality charting software that enables users to become more prolific day traders on a number of different stock exchanges/indexes.

1.2. Key Features

- **VR Workspace:** Unique, **easy-to-use** interface dedicated for day-traders. Designed by professional traders. Comfortable for continuous use.
- **Real-time Collaboration:** Voice conferencing and **Workspace-Sharing** capabilities between users in the same organization
- **Infinite Workspace:** Add as many data as you can to keep in focus. Save, Load and Share your layouts.
- **Live Financial Data:** Interactive charts with drawing tools and indicators. Market news feed and financial reports. Financial TV channels broadcasting.
- **Voice Recognition & Configurable Hotkeys:** Place Trades by voice commands or hotkeys for immediate action on market changes.
- **Voice Recognition technology** for communication with other traders and system processing of trades

1.3. Value Proposition

- Different price and feature tiers, creating both **B2C and B2B revenue streams**. Solid **Go-To-Market strategy**.
- No more dependence on many screens. One workspace with no space limitations. Engaging tool that will **increase retention and LTV**.
- Help companies **minimize spending** required for large trading offices by allowing traders to work remotely.
- **Stay connected.** Collaboration tools and Workspace sharing capabilities.



1.4. The Need

When trading, it is extremely important to be alert and aware of the constant changes to the Stock Market. Having the right information at the right time and acting on it, can deliver high returns and profits.

Distractions in the workplace can result in declining performance in returns. Focus is required for the most effective trading strategies, which can be difficult when traders have expansive set ups with multiple screens.

1.5. Competitive Edge

No Space Limits/Barriers to Entry: The cost of screens to view all the various graphs and charts is an increasing cost and a potential barrier to those who want to enter the day trading market but might not have the space to set up a physical work environment.

Easy Navigation: All the information and resources a trader needs will be available to them inside the virtual trading environment.

Targeting Individual Trading: Rather than focusing on corporate clients, **AXIS-Z** strives to focus on the individual trader's experience and help reduce distractions.

Re-Emerging Tech: Prior attempts to develop similar technology have not developed in recent years. Therefore, the product offers a unique opportunity to reinvigorate market interest.

1.6. Revenue Model

AXIS-Z will generate revenue from the sale of software packages to its targeted consumers across three tiers.

- Basic: **\$30/month**
- Pro: **\$100/month**
- Executive: **\$400/month**

1.7. Go to Market

- Pilots in US and Europe/UK market
- Engage with individual traders and corporate clients



1.8. The Team

Rasim Muradov: Working towards Bachelor's Degree in Electrical Engineering at Holon Institute of Technology; Founder of Think-Smart Israel as an Electric Engineer; Speaks 5 languages: Hebrew, English, Russian, Azerbaijani, Turkish; Pattern Day Trader for more than 3 years

Dmitri Lapchinski: 6+ years in VR development, UX/UI design, and VFX. Strong Project & Product Management skills gained in two previous startups. Team Lead at world's most visited VR-video streaming website. Master's degree in IT & Design.



2. The Product

2.1. Product Overview

AXIS-Z is a Virtual Reality charting software that enables users to become more prolific day traders on a number of different stock exchanges/indexes. For an optimal user experience, the software will be compatible with most VR glasses currently on the market and existing accessories such as a VR Joystick, Mouse, Microphone and Keyboard.

2.2. Key Features

- **VR Workspace:** Unique, **easy-to-use** interface dedicated for day-traders. Designed by professional traders. Comfortable for continuous use.
- **Real-time Collaboration:** Voice conferencing and **Workspace-Sharing** capabilities between users in the same organization
- **Infinite Workspace:** Add as many data as you can to keep in focus. Save, Load and Share your layouts.
- **Live Financial Data:** Interactive charts with drawing tools and indicators. Market news feed and financial reports. Financial TV channels broadcasting.
- **Voice Recognition & Configurable Hotkeys:** Place Trades by voice commands or hotkeys for immediate action on market changes.
- **Voice Recognition technology** for communication with other traders and system processing of trades

2.3. How it Works

The platform gives users the opportunity to use different accessories to control the virtual surroundings. There are multiple ways to process a trade:

1. Get VR Goggles; AXIS-z supports most types.
2. The User connects their brokerage account and sets up their personal workspace.
3. Immerse in a distraction-free virtual environment to keep Users focused on the current market state, and make them into more prolific trades.



2.4. Value Proposition

AXIS-Z will offer different price and feature tiers, which will create both B2C and B2B revenue streams, this facilitating a solid Go-to-Market Strategy



Individual Day Traders

AXIS-Z eliminates the dependence on many screens, creating one workspace with no space limitations that will increase user retention and lifetime value. **AXIS-Z** creates a space where individual users can access unlimited stock market information using one headset. Traders will have the opportunity to view unlimited charts inside the VR environment and will no longer depend on many screens to track their trades.



Corporate Clients

AXIS-Z helps companies minimize spending required for large trading offices by allowing traders to work remotely. Using the Collaboration tools and the Workspace sharing capabilities, Co-workers can stay connected with each other and view each other's trading portfolios and workspaces in the VR environment. **AXIS-Z** creates a better trading experience for their traders by enabling them to trade in an entirely virtual environment, where all the information they may need is on one 3D display.

2.5. The Need

When trading, it is extremely important to be alert and aware of the constant changes to the Stock Market. Having the right information at the right time and acting on it, can deliver high returns and profits. Distractions in the workplace can result in declining performance in returns. Focus is required for the most effective trading strategies, which can be difficult when traders have expansive set ups with multiple screens.

Screens occupy a trader's limited space, but with the introduction of the VR trading interface, traders will only require the headset display with the charting software to participate in the enhanced trading experience. The solution will help minimize distractions, eliminating the need for "Silent Rooms", to create the ideal virtual trading experience.



2.6. Future Developments

- **Portable micro-terminal** with built-in trading interface works with current VR accessories on the market
- **API** for developers



3. The Market

The below Market Analysis focuses on the **market size, trends and potential as well as the total addressable market**, offering a suggestion of where **AXIS-Z** has space to grow.

3.1. Market Size

- Online Day Traders Market Size 2018: **13.9 million traders**.
- In Asia, the most recent value of stocks traded amounted to \$30.57 trillion in 2019.¹ The number of users approximates to **4.6 million online day traders**. (2018)²
- In Europe, the total value of stocks traded was reported at \$1.46 trillion in 2019.³ The number of users is about **3.1 million online day traders**. (2018)⁴
- In the US, the total transaction value of stocks traded amounts to \$23 trillion (2019). The number of users is approximately equal to **1.6 million day traders** (2018).⁵
- The total value of stocks traded in the United Kingdom was reported at \$2.7 trillion in 2019.⁶ The number of day traders in the UK is **730,000** in 2018.⁷

\$1.25 B

Total Addressable Market

The average amount of return for day traders is \$321. The daily returns spread for day traders is between -\$200 and +900⁸.

The largest Stock Exchange Operators Worldwide, by Market Capitalization as of March 2020 are⁹:

¹ <https://data.worldbank.org/indicator/CM.MKT.TRAD.CD>

² https://brokernotes.co/wp-content/uploads/2017/08/BN-research-report_2018-FINAL.pdf

³ [https://tradingeconomics.com/european-union/stocks-traded-total-value-current-us\\$-wb-data.html](https://tradingeconomics.com/european-union/stocks-traded-total-value-current-us$-wb-data.html)

⁴ https://brokernotes.co/wp-content/uploads/2017/08/BN-research-report_2018-FINAL.pdf

⁵ https://brokernotes.co/wp-content/uploads/2017/08/BN-research-report_2018-FINAL.pdf

⁶ <https://data.worldbank.org/indicator/CM.MKT.TRAD.CD>

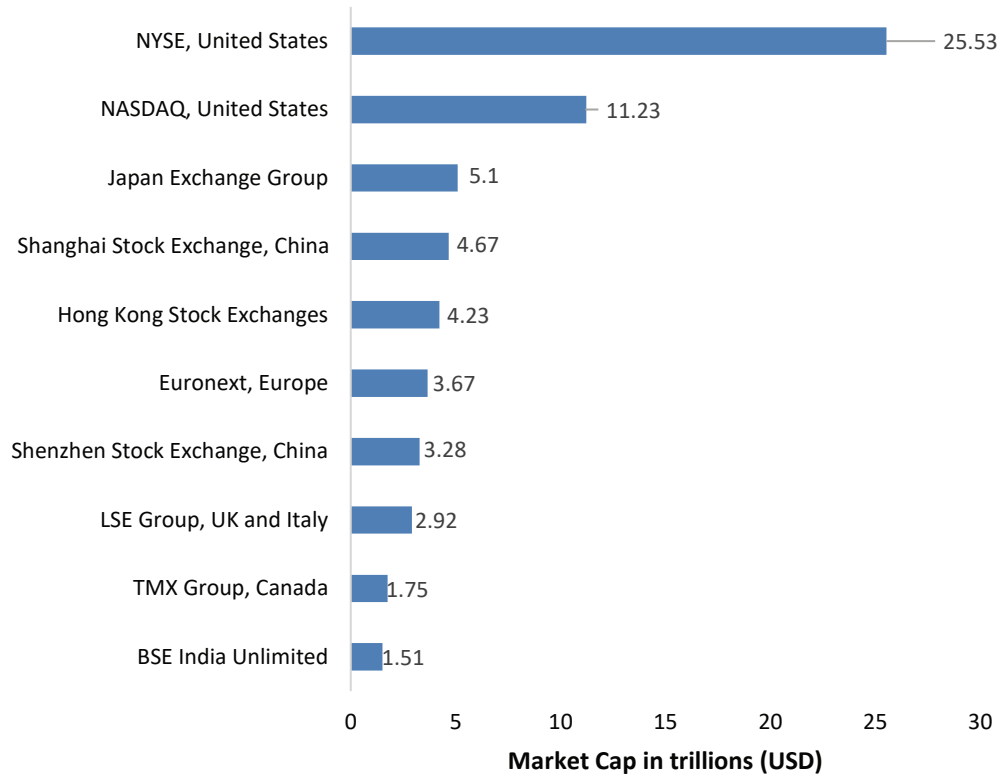
⁷ https://brokernotes.co/wp-content/uploads/2017/08/BN-research-report_2018-FINAL.pdf

⁸ <https://start-online-trading.com/what-kind-of-returns-do-day-traders-make/#:~:text=As%20you%20can%20see%2C%20daily,%24200%20and%20%24400%20a%20day>

⁹ <https://www.statista.com/statistics/270126/largest-stock-exchange-operators-by-market-capitalization-of-listed-companies/#:~:text=The%20New%20York%20Stock%20Exchange,Exchange%2C%20and%20Tokyo%20Stock%20Exchange>



Largest Stock Exchange Operators Worldwide



- The Virtual Reality Market Value 2020: ¹⁰ **\$10.32bn**
- Market with the Largest Share of the Virtual Reality Market 2019: ¹¹ Asia Pacific; **41.4%**

Percentage of Day Traders who pay for their Premium Tools by Region:

In the US, Asia, and Europe, about 30% of individual online day traders use a paid online trading software to execute their trades.¹²

In the UK, 27% of online day traders use paid online trading software.¹³

The remaining individual day traders utilize free charting software with associated broker fees or are dealing directly with stockbrokers.

¹⁰ <https://www.grandviewresearch.com/industry-analysis/virtual-reality-vr-market>

¹¹ <https://www.prnewswire.com/news-releases/virtual-reality-market-size-worth-62-1-billion-by-2027--cagr-21-6-grand-view-research-inc-301076598.html>

¹² <https://www.publicfinanceinternational.org/best-online-trading-platform-singapore/>

¹³ <https://www.publicfinanceinternational.org/best-online-trading-platform-uk/>



Top Players in the Charting Software Market:



3.2. Market Trends

- The COVID-19 pandemic has led to an increase in day traders, as people are trying to make up for lost income due to the pandemic.¹⁴

3.3. Market Potential

Market Size of Virtual Reality Industry

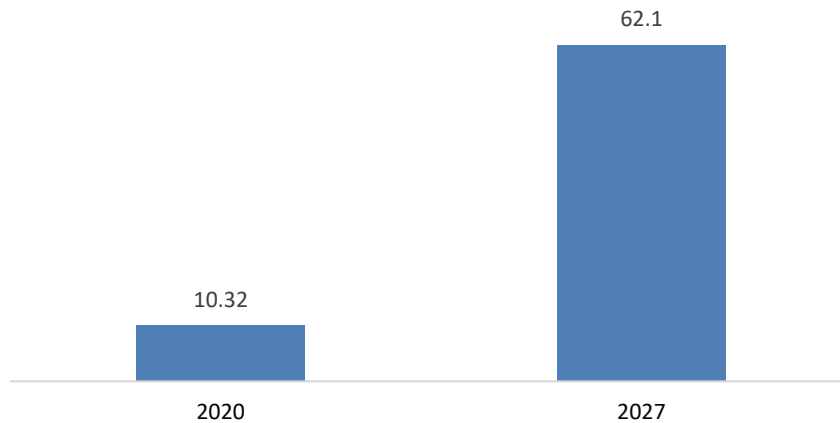


Figure 2: Global Virtual Reality Market Value CAGR 2020-2027: **21.6%**¹⁵

¹⁴ <https://www.cnbc.com/2020/09/21/many-people-turn-to-day-trading-in-pandemic-few-will-be-a-winners.html>

¹⁵ <https://www.prnewswire.com/news-releases/virtual-reality-market-size-worth-62-1-billion-by-2027--cagr-21-6-grand-view-research-inc-301076598.html>



Market Size of Trading Software (in millions of dollars)

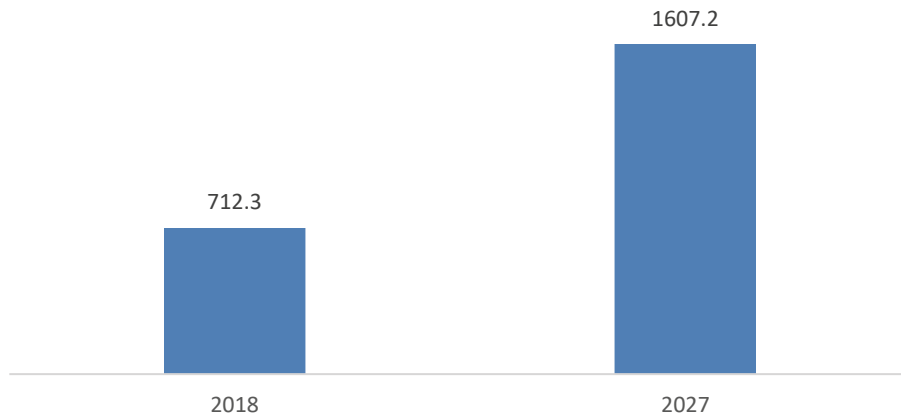


Figure 4: Global Trading Software Market Value CAGR 2019-2027: 9.6%¹⁶

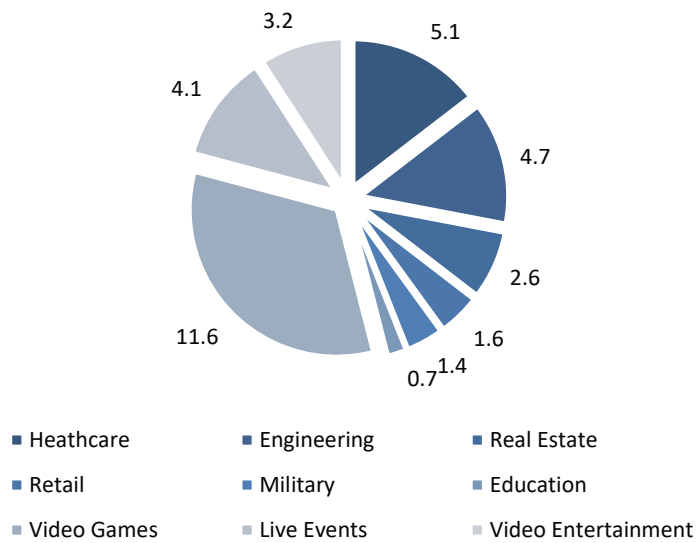


Figure 3: Predicted Market Size of VR/AR applications by 2025 (in billions)¹⁷

¹⁶<https://www.businesswire.com/news/home/20190920005259/en/Global-Trade-Management-Software-Market-to-2027---Analysis-and-Forecasts-by-Component-Deployment-Organization-size-End-user---ResearchAndMarkets.com>

¹⁷ <https://www.statista.com/chart/4602/virtual-and-augmented-reality-software-revenue/>



Industries using VR ¹⁸	
Automotive Industry	VR allows engineers and designers to view a model in virtual reality before commissioning a physical prototype.
Healthcare	Healthcare professionals use virtual models to trial surgeries, new technologies and view X-Rays. Additionally, VR can be used as a treatment therapy for burn injuries.
Retail	Many retail companies are starting to invest in VR solutions to better serve their clients. Stores are starting to integrate body scanning technology to determine sizing for customers and enable virtual fitting of clothing ranging from sunglasses to suits.
Real Estate	Virtual Reality in the Real Estate Industry allows potential clients to explore houses online and eliminates the need to go in person.
Education	VR enables students to be completely immersed in a virtual environment to simulate the feeling of a classroom, tour Ancient Rome or participate in experiments. In light of the COVID-19 pandemic, many universities and institutions created virtual campus tours to allow potential students to see their campuses.
Entertainment	Virtual Reality enables event organizers to welcome more individuals to in-person events.

3.3.1. Challenges of Day Trading:

- 4-5% of US Adults have Attention Deficit Hyperactivity Disorder (ADHD)
- 15% of people lose focus at work because they are distracted by their phones
- Day traders have on average 6 screens for effective trading¹⁹

3.4. Total Addressable Market

P = Average Price for service

T = Number of Traders in the World

T x P = 13.9 Million x \$90 = \$1.25 Billion

¹⁸ <https://virtualspeech.com/blog/vr-applications>

¹⁹ <https://www.readyfortrading.com/en/how-many-screens-do-i-need-for-my-trading-station/>



3.5. Bottom Line

- Average of six screens costing \$200 each
- \$24,000 a year for a subscription to the Bloomberg Trading Insights
- \$22,000 for a Thomson Reuters Terminal

Day traders buy and sell on the financial markets with a fast turnaround, usually within the same trading day and never stay in the same position. Based on the Market Potential of both the Virtual Reality and Online Day Trading markets, the landscape of the integration of VR and Online Day Trading is a new and emerging market. Many companies have started to experiment with virtual reality to improve current trading conditions and enhance the trading experience for their traders, customers and clients.

Individual traders and beginners can implement this technology for an all-inclusive trading experience at lower costs. To beginners, the cost associated with starting to trade on their own on the Stock Market is high and intimidating. Many individual traders have on **average six screens** to organize their trades and maximize their potential returns. All while, the average amount of return for day traders is \$321. The daily returns spread for day traders is between -\$200 and +900.²⁰

For a beginner in trading, the startup costs for a physical work environment with at least two screens costs around **\$200 each**. For individual traders, some of the trading software is free with broker fees while others require a subscription to a charting software. Corporate firms pay **\$24,000** a year for a subscription to Bloomberg trading insights or **\$22,000** for the Thomson Reuters Eikon Terminal.²¹

There is no widely used virtual reality alternative to trade on online stock exchanges for individual day traders. It seems that the American and European Markets will have the highest potential Return on Investment and use among beginners or experienced individual day traders due to the use of charting software in these locations. These markets would be easiest to conduct market research in due to the ease of integration of the product and will not require additional languages for platform development.

²⁰<https://start-online-trading.com/what-kind-of-returns-do-day-traders-make/#:~:text=As%20you%20can%20see%2C%20daily,%24200%20and%20%24400%20a%20day>

²¹ <https://www.investopedia.com/articles/investing/052815/financial-news-comparison-bloomberg-vs-reuters.asp>



4. Competitive Landscape

4.1. Overview

The following competitors below represent the primary challengers to the services offered By **AXIS-Z**. The relevant players include:

Direct Competitors

- **eSignal** - eSignal delivers real-time market data and decision support tools for active traders through their charting platform.
- **TradingView**: Social networking platform for traders to track stocks, indices and forex prices. The platform also serves as a forum for traders to publish their own ideas and raise their profile within the TradingView community.²²
- **TC2000** - TC2000 is a trading platform that combines charting, stock & option screening, and trading features.
- **GMO Click Securities** - Click Securities is an asset management company. GMO FX VR is their application for smartphones, which enables users to experience an online trading environment, combining Forex trading and virtual reality.²³
- **Citibank Holographic Workspace** - CitiBank's Holographic Workspace using Microsoft HoloLens, organizes data by tiers to trade stocks in a mixed 2D/3D environment. The product was released in March 2016 and designed for use by investor clients and the next-generation markets trading work environment at Citi.^{24,25}
- **SPECTRE.ai** - SPECTRE.ai offers a 3D trading platform of current market trends, predictions and charts, which can be viewed in VR. This solution is currently available in the Asian market.

Indirect Competitors

- **Swissquote** - Swissquote has developed a VR trading application that enables users to control a virtual trading environment, using eye tracking technology. No further developments since 2017.

²² <https://craft.co/tradingview>

²³ <https://financefeeds.com/gmo-click-launch-virtual-reality-app-forex-trading/>

²⁴ <https://www.businesswire.com/news/home/20160330006285/en/8ninths-Develops-“Holographic-Workstation”TM-for-Citi-Traders-using-Microsoft-HoloLens>

²⁵ <https://www.ft.com/content/7a551253-1f74-4f9a-8845-f9b7220dcca>



- **Mark.Space** - Mark.Space has developed an open source platform for the creation of 3D- and VR- compatible online spaces and objects, powered by Blockchain. The Mark.Space platform has yet to be utilized for virtual day trading and is in use in the real estate sector.
- **Comarch Finance** - Comarch created a VR/AR ecosystem, compatible with smartphones and smartwatches to the Oculus headset to present and exchange data and manage financial portfolios between users.²⁶ No further developments since 2016.

4.2. Competitive Edge

AXIS-Z maintains the following competitive edge over the relevant players through a number of factors:

- **No Space Limits/Barriers to Entry:** The cost of screens to view all the various graphs and charts is an increasing cost and a potential barrier to those who want to enter the day trading market but might not have the space to set up a physical work environment. To set up a proper physical workspace, having at least two screens costing around \$200 each is standard practice. Overhead costs for both individuals and corporations play a factor in the ease of online day trading.
- **Easy Navigation:** All the information and resources a trader needs will be available to them inside the virtual trading environment. Using accessories such as the VR joystick, mouse or voice commands, will further increase the trader's ease to interact inside the VR system.
- **Targeting Individual Trading:** Rather than focusing on corporate clients, *AXIS-Z* strives to focus on the individual trader's experience and help reduce distractions to maximize success while trading on the Stock Market.
- **Re-Emerging Tech:** Prior attempts to develop similar technology have not developed in recent years. Therefore, the product offers a unique opportunity to reinvigorate market interest.

²⁶ <https://www.comarch.com/finance/news/virtual-reality-in-wealth-management/>



4.3. Direct Competitors

4.3.1. eSignal



Overview: eSignal delivers real-time market data and decision support tools for active traders through their charting platform.

Key Facts and Figures:

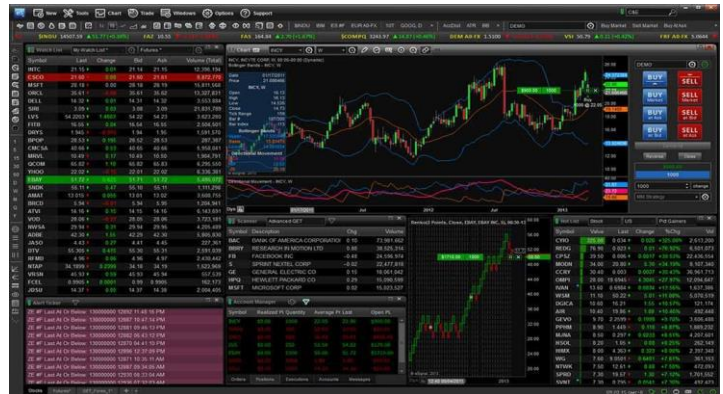
- Type: **Private**
- Established: **2001**
- HQ: **San Francisco, CA, USA**

Key Features:

- Customizable charts
- Back testing and scanning tools to judge effectiveness of trading strategies
- Real time market data from hundreds of global markets
- Drawing capabilities on charts to help identify trends and patterns

Revenue/Pricing Model²⁷:

- Classic - \$54/month
 - Reliable Delayed EOD, Intraday market data, Customizable Advanced Charting, Trading Education such as access to live and on-demand trading webinars, Advanced Drawing Tools
- Signature - \$176/month
 - Email alerts, ESignal mobile, News, Commentary and Research access, access to basic Market Data
- Elite - \$359/month



²⁷ <https://www.esignal.com/compare-products>



- Live Mentoring Classes, able to download Data, access to GET Technical Analysis & GET indicators, Trend Analysis with 4Core AGET strategies, Identify Future Price Levels
- Product Add-ons & Partnerships – 44 different paid or free add-ons to the software
 - Examples include:
 - Bollinger Bands Tool Kit - \$25/month – 31 indicators and systems of Bollinger Bands
 - CNBC TV - \$5/month – commercial free broadcast of CNBC TV
 - Market Profile - \$55/month – Chart type that organizes Volume Profiles, TPO counts, splits

Classic	Signature	Elite
<p>\$54/month¹ or \$540/year on an annual prepaid basis</p> <p><small>30-Day Money Back Guarantee</small></p> <p>SIGN UP NOW</p> <ul style="list-style-type: none"> • Intraday Dispatch Data (Exclusive Real-Time Streaming Data) • Intraday Data (25 minute delayed) • Advanced Charting with customizable Studies • Stocks, Futures, Forex • Free online Education and Customer support • View Up to 500 Symbols at a Time • Market Screener Plus² • App Store with 100s of technical indicators • Advanced Drawing Tools (such as Regression Trend and Time Cycles) • Send email alerts 	<p>\$176/month¹ or \$1594/year on an annual prepaid basis</p> <p><small>Not including real-time exchange fees 30-Day Money Back Guarantee</small></p> <p>SIGN UP NOW</p> <ul style="list-style-type: none"> • Streaming, Real-Time Data • Advanced Charting with customizable Studies • Stocks, Futures, Forex and Options³ • Free online Education and Customer support • View Up to 500 Symbols at a Time • Market Screener Plus² • App Store with 100s of technical indicators • Advanced Drawing Tools (such as Fibonacci Tools and Pitchfork) • Send email alerts • eSignal Mobile • News, Commentary and Research • Back-testing • View Market Depth⁴ • Download Data using QIBK or RTD⁵ • 1 or 100-day Historical Data⁶ • Analyze Market Data with Market Profile⁷ • Analyze volume with Volume Delta⁸ 	<p>\$359/month¹ or \$3,480/year on an annual prepaid basis</p> <p><small>Not including real-time exchange fees 30-Day Money Back Guarantee</small></p> <p>SIGN UP NOW</p> <ul style="list-style-type: none"> • Streaming, Real-Time Data • Advanced Charting, including Advanced GET Studies • Stocks, Futures, Forex and Options • Live, once per week, Mentoring Classes • View Up to 500 Symbols at a Time • Market Screener Plus² • App Store with 100s of technical indicators • Advanced Drawing Tools (such as Time and Price Squares, HCB and Gann lines) • Send email alerts • eSignal Mobile • News, Commentary and Research • Back-testing • View Market Depth • Download Data using QIBK or RTD • Unlimited history • Analyze Market Data with Market Profile⁷ • Analyze volume with Volume Delta • Identify future price levels with Make or Break • Advanced GET technical analysis trading platform • 20h Exclusive GET Indicators • Trend Analysis with 4 Core AGET strategies



4.3.2. TradingView



TradingView

Overview: Social networking platform for traders to track stocks, indices and forex prices. The platform also serves as a forum for traders to publish their own ideas and raise their profile within the TradingView community.²⁸

Key Facts and Figures:²⁹

- Type: **Private**
- Established: **2011**
- HQ: **Westerville, Ohio, USA**
- Total Funding: **\$40.8 million**

TradingView Capital Raised (\$ mn)



Key Features³⁰:

²⁸ <https://craft.co/tradingview>

²⁹ <https://craft.co/tradingview>

³⁰ <https://www.tradingview.com/features/>



- Charting for all levels of investors, that provides them with:
 - Price Scaling
 - Interactive Earnings, Dividends, and Splits
 - Stock Comparisons
 - Dividend- Adjusted Charts
 - Financial Data
 - Data Exportation Capabilities
 - Extended Trading Hours
- Technical Analysis Tools replete with features such as:
 - Volume Profile Indicators
 - Candlestick Pattern Recognition
 - Multi-timeframe Analysis
 - Auto Fib Retracement
 - Custom Indicator Templates
- Users may utilize Pine Script as a way to commute and share their analyses while being able to access pricing and financial data from any ticker symbol.
- Customized Alerts for any device to assist users in tracking updates on a specific price, indicator, strategy or drawing.
- Social Networking Capabilities that provide users with the capability to:
 - Livestream their analyses
 - Publish their ideas for other traders to see
 - Real-time chatting with other traders
- Conduct Trading via Selected Brokers
- Practice Trading with Paper Money
- Trade directly from the chart interface

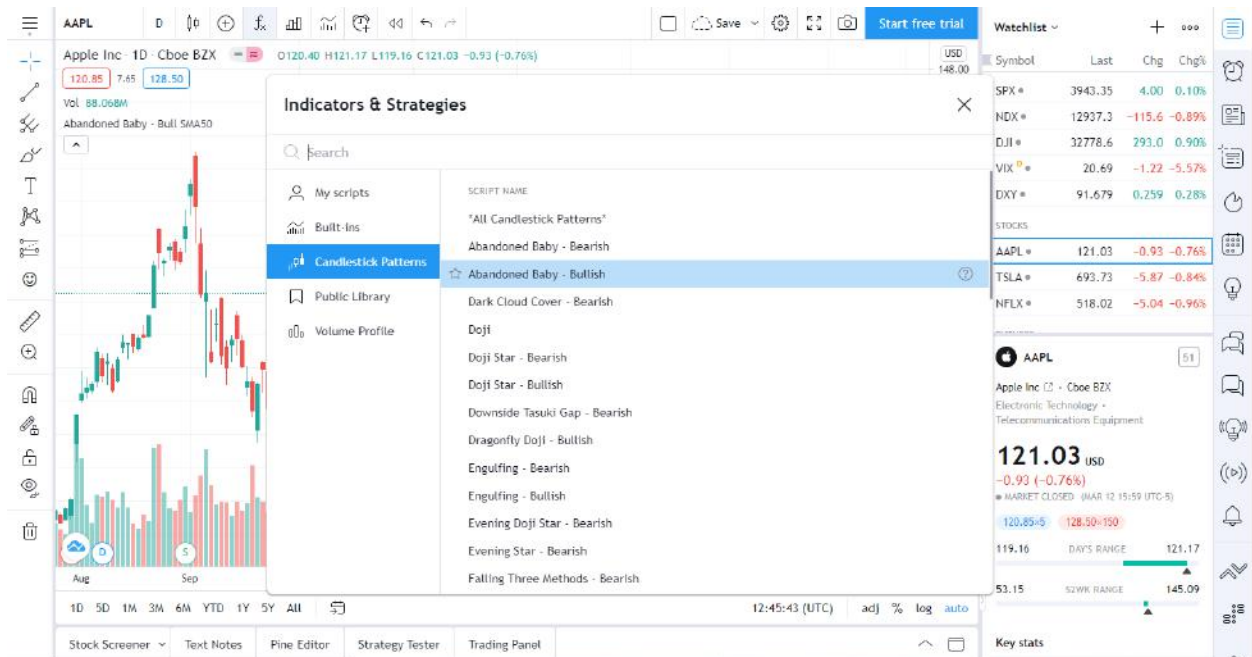


Revenue/Pricing Model³¹: Premium models include:

³¹<https://www.tradingview.com/gopro/?source=footer&feature=pricing>



- Basic - \$0.00/month – TradingView Charts, Smart Drawing Tools, Technical Indicators, Market Data Coverage, Customizable Charts, and Backtesting.
- Pro - \$14.95/month – All Basic plan features without ads, volume profile indicators, 2-charts in one window, 5 indicators per chart, and 10 server-side alerts.
- Pro+ - \$29.95/month – All Pro+ features with double the indicators per chart, charts in one layout, in addition to intraday exotic charts, chart data exports, and charts based on user customized formulas.
- Premium - \$59.95/month – Full package with an 8-in-1 chat layout, no expiration on alerts, 400 server-side alerts and the publication of invite-only indicators.



4.3.3. TC2000



Overview: TC2000 is a trading platform that combines charting, stock & option screening, and trading features.

Key Facts and Figures³²:

- Type: **Private**
- Established: **1988**
- HQ: **Wilmington, North Carolina, USA**

Key Features³³:

- Easy visuals to understand trading and options strategies
- Can create paper Trading Accounts to test ideas and strategies
- Access to market index watchlists such as the SP-500, Nasdaq 100, High Cap 1000, NYSE, Biotechs, Gold & Silver, Airlines, Oil, Financials, TSX
- Drawing capabilities on charts to help identify trends and patterns
- Access to library of indicators



Revenue/Pricing Model³⁴: Premium models include:

- Silver - \$8.32/month – Customizable layouts of charts, watchlists, notes and trading
- Gold - \$24.99/month – Chart drawing tools, workspace layouts across monitors, graphs of sectors/earnings, sortable watchlists
- Platinum - \$74.98/month - Historical scan results, 1000 alerts simultaneously tracked, build market timing indicators, automatic refresh intervals on scans & sorts
- Optional Data Feeds such as US Stock Data, Real-time Dow Jones and LiveBriefs by MT Newswires available for additional monthly fees.

³² <https://www.crunchbase.com/organization/worden-brothers>

³³ <https://www.tc2000.com/features/overview>

³⁴ <https://www.tc2000.com/Pricing>



	Silver	Gold	Platinum
Choose Billing Cycle			
<input type="radio"/> Monthly <input checked="" type="radio"/> Annually <input type="radio"/> Bi-Annually			
	\$9.99 \$8.32/mo Select	\$29.99 \$24.99/mo Select	\$89.99 \$74.98/mo Select
Customizable layouts of charts, watchlists, notes & trading	•	•	•
GOLD & PLATINUM ALSO INCLUDES			
EasyScan® stock & option screener		•	•
Simple step-by-step wizard to create conditions		•	•
Chart drawing tools (trendlines, shapes, notes, more)		•	•
Sortable watchlists		•	•
Workspace layouts across multiple monitors		•	•
Up to 100 alerts can be simultaneously tracked		•	•
Graphs of sectors, earnings, % insider shares, sales...		•	•
Pre/post market mode with morning pre-buzz (requires RT)		•	•
Formula writing		•	•
PLATINUM ALSO INCLUDES			
Historical condition testing			•
Historical scan results			•
Automatic refresh intervals on scans & sorts			•
Up to 1000 alerts can be simultaneously tracked			•
Build market timing indicators from scan plots			•
Get up to \$300 discount per year with Brokerage Account*			•



4.3.4. GMO



Overview: Click Securities is an asset management company. GMO FX VR is their application for smartphones, which enables users to experience an online trading environment, combining Forex trading and virtual reality.³⁵

Key Facts and Figures³⁶:

- Type: **Private**
- Established: **2005**
- HQ: **Tokyo, Japan**

Key Features³⁷:

- Headset/Special Goggles needed to enter virtual space
- Utilizes FX Neo – GMO Click’s platform for retail Forex trading
- Navigation available by eye movements and focus changes; to zoom in and out, select currency pairs, place orders by matching line of sight
- 180 Degree Chart display
- Multiple currency pairs and Real time charts reproduced in VR
- Completely Hands Free
- 100,000+ Google Play Downloads

Pricing Model: Free App

Revenue Model:

- Forex Broker Fees

³⁵ <https://financefeeds.com/gmo-click-launch-virtual-reality-app-forex-trading/>

³⁶ <https://www.crunchbase.com/organization/gmo-click-securities>

³⁷ <https://financefeeds.com/gmo-click-launch-virtual-reality-app-forex-trading/>



4.3.5. CitiBank Holographic Workstation



CitiBank Holographic Workstation

Overview: CitiBank’s Holographic Workstation using Microsoft Hololens, organizes data by tiers to trade stocks in a mixed 2D/3D environment. The product was released in March 2016 and designed for use by investor clients and the next-generation markets trading work environment at Citi.³⁸³⁹

Key Facts and Figures: (8Ninths)

- Type: **Public - Acquired by Valence**
- Established: **2008**



Key Features⁴⁰:

- A three-tiered system with interactive information enables traders to view, process, and interact with large amounts of abstract data
- Combined 3D and 2D environment
- 3D Holograms of Financial Data
- *Upper Tier:* The physical workstation integrates tablet screen space, 3D holographic docking pace, keyboard, and mouse
- *Middle Tier:* Cameras are used to track hand motions and voice to filter use of financial instruments
- *Lower Tier:* Trader can view a historical and real time performance before executing a trade

Revenue/Pricing Model:⁴¹ Three configurations:

- Developer Edition Price: \$3,500, Unity Pro & PiXYZ Plugin trial, \$500 Azure credit
- Hololens Device bundled with Dynamics 365 Remote Assistant \$125 per user, per month
- Device only SKU: \$3,500

³⁸ <https://www.businesswire.com/news/home/20160330006285/en/8ninths-Develops-“Holographic-Workstation”TM-for-Citi-Traders-using-Microsoft-HoloLens>

³⁹ <https://www.ft.com/content/7a551253-1f74-4f9a-8845-f9b7220dcca>

⁴⁰ <http://www.dthomas.co.uk/content/fs/downloads/futuretech/FutureTech-7.pdf>

⁴¹ <https://www.techrepublic.com/article/microsoft-begins-shipments-of-mixed-reality-for-business-hololens-2/>





SPECTRE.AI

- **Overview:** SPECTRE.ai offers a 3D trading platform of current market trends, predictions and charts, which can be viewed in VR. This solution is currently available in the Asian market.

Key Facts and Figures:⁴²

- Type: **Private**
- Established: **2017**
- HQ: **Cayman Islands**

Key Features:⁴³⁴⁴

- Comprehensive 3D map of current market trends, along with predictions and charts, viewed in VR
- AI created algorithms that can spot risky trading behavior and issue warnings to prevent disasters before they occur
- Incorporates Ethereum blockchain with trading options like digital/binary trading
- Broker is replaced by liquidity pool where all users have investment in everyone's earnings – keeps the shares more secure and communal
- Features available such as smart contracts to ensure users aren't scammed or defrauded
- No exchange of money until transaction is complete
- Trades Cryptocurrencies, fiat currencies, Bonds, Binary options CFD, FX, ETFs, Stocks

Revenue/Pricing Model:⁴⁵

- Generated based on the volume of transactions (all transactions, losses or winnings)

⁴² [Craft.co/spectre-ai](https://craft.co/spectre-ai)

⁴³ <https://medium.com/@kingdombunniez/spectre-ai-the-worlds-first-broker-less-financial-trading-platform-review-2e68274671d4>

⁴⁴ <https://www.daytrading.com/spectre-ai>

⁴⁵ <https://www.vrfocus.com/2017/10/spectre-ai-launch-vr-platform-for-financial-trading/>



4.4. Indirect Competitors

4.4.1. Swissquote



THE SWISS LEADER IN ONLINE BANKING

Overview: Swissquote has developed a VR trading application that enables users to control a virtual trading environment, using eye tracking technology. No further developments since 2017.

Key Facts and Figures:⁴⁶

- Type: **Private**
- Established: **1999**
- HQ: **Gland, Switzerland**

Key Features:^{47,48}

- Uses VR Helmet
- 360 trading wall for users to monitor markets and make trades
- Feeds real time data from the main indexes including Swiss Index Market, currency pairs
- Customers can bring up more information on a specific stock by using Eye Tracking Technology
- Swissquote clients can view status of their account through the headset

⁴⁶ <https://www.crunchbase.com/organization/swissquote>

⁴⁷ <http://www.dthomas.co.uk/content/fs/downloads/futuretech/FutureTech-7.pdf>

⁴⁸ <https://www.fintechfutures.com/2017/02/glance-and-trade-swissquote-introduces-vr-trading/>



4.4.2. Mark.Space



Overview: Mark.Space has developed an open source platform for the creation of 3D- and VR- compatible online spaces and objects, powered by Blockchain. The Mark.Space platform has yet to be utilized for virtual day trading and is in use in the real estate sector.

Key Facts and Figures:⁴⁹

- Type: **Private**
- Established: **1990**
- HQ: **Russia**

Key Features⁵⁰:

- Blockchain-based 3D, VR, AR platform
- Each user can create their own 3D, VR and AR-compliant site and become the owner of a virtual real estate
- Leverages blockchain technology for registration and security of the rights to the property.
- Property owners can buy, sell and/or rent their units to others through the use of smart contracts.

⁴⁹ <https://www.crunchbase.com/organization/mark-space-f092>

⁵⁰ <https://tracxn.com/explore/Blockchain-Startups-in-Russia>



4.4.3. Comarch



Overview: Comarch created a VR/AR ecosystem, compatible with smartphones and smartwatches to the Oculus headset to present and exchange data and manage financial portfolios between users.⁵¹ No further developments since 2016.

Key Facts and Figures:⁵²

- Type: **Private**
- Established: **1993**
- HQ: **UK based**



Key Features:⁵³

- VR/AR 'ecosystem' for investors and business owners
- It uses a mixture of smart wearables and the Oculus headset
- Can manage client's financial portfolio in the 3D environment
- Communication between users takes place via smartphones and smart watches and headsets
- Data can be presented and exchanged between users in virtualized meetings via the headset

⁵¹ <https://www.comarch.com/finance/news/virtual-reality-in-wealth-management/>

⁵² [Craft.co/comarch](http://craft.co/comarch)

⁵³ <http://www.dthomas.co.uk/content/fs/downloads/futuretech/FutureTech-7.pdf>

5. SWOT Analysis



Strengths

- Improves Trader Performance
- Software is compatible with all Virtual Reality headsets currently on the Market
- No Physical or Virtual Space Limitations – Monitors and Trading Terminals take up sizable physical space in a user’s workplace, depending on the number of screens any user may have



Weaknesses

- No traction to date
- VR equipment can be dangerous for people with head injuries, pregnant women, can cause severe eye strain, nausea, if used for extended periods of time



Opportunities

- Technological advancements led to an increase in VR adoption⁵⁴
- Market is large and product can be made available to high volumes of individual and corporate traders
- 3.1M European traders, 1.6M US traders and 730,000 UK traders are attainable potential users⁵⁵
- A majority of online day traders use a paid charting software to execute their trades^{56,57}



Threats

- Competition has already developed partnerships and technology along with capital reserves to fund the project
- Consumer Apathy: Current market conditions may not see a need to change the status quo

⁵⁴ <https://www.statista.com/statistics/591181/global-augmented-virtual-reality-market-size/>

⁵⁵ https://brokernotes.co/wp-content/uploads/2017/08/BN-research-report_2018-FINAL.pdf

⁵⁶ <https://www.publicfinanceinternational.org/best-online-trading-platform-singapore/>

⁵⁷ <https://www.publicfinanceinternational.org/best-online-trading-platform-uk/>



6. Business Model

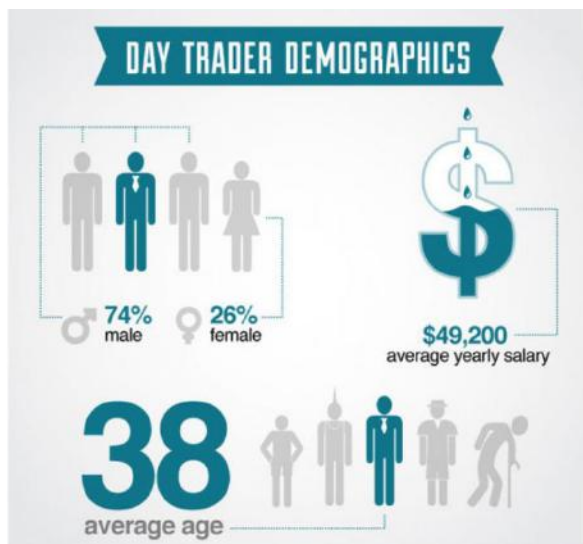
6.1. Target Market

- The initial markets to introduce the software will be in a number of **European** market, and the **United States** market simultaneous as a way of determining which market will have the highest rates of adoption while delivering the highest ROI.
- The European market is forecasted to expand at a CAGR of **23.3%** from 2019-2027.⁵⁸ This is attributed to increasing early adoption of VR innovations and the increasing scope of application in many industries such as stock market trading.

Both markets will be crucial to capture because of their large markets of individual traders and are home to the largest stock exchanges in the world.

AXIS-Z has great potential to succeed and gain market share. The relevance of Virtual Reality in these markets will result in high consumer acceptance and widespread integration of the software into stock trading.

6.2. Target Audience⁵⁹



⁵⁸ <https://www.grandviewresearch.com/industry-analysis/virtual-reality-vr-market>

⁵⁹ <https://visual.ly/community/infographics/business/truth-about-day-trading>





AXIS-Z plans to sell the product to three types of customers: **individual traders, trading companies** and **corporate clients with trading services**. The main purpose of this venture is to introduce a new, cost effective trading experience that will give flexibility to all traders to be able to trade from anywhere, without distractions.

For individual traders, this new way to trade will be easier to navigate and have a more organized interface for beginners and experienced traders. The product has lower startup costs than the established set up of many screens to display charts and indexes, which takes up physical space in a trader’s home or workplace.

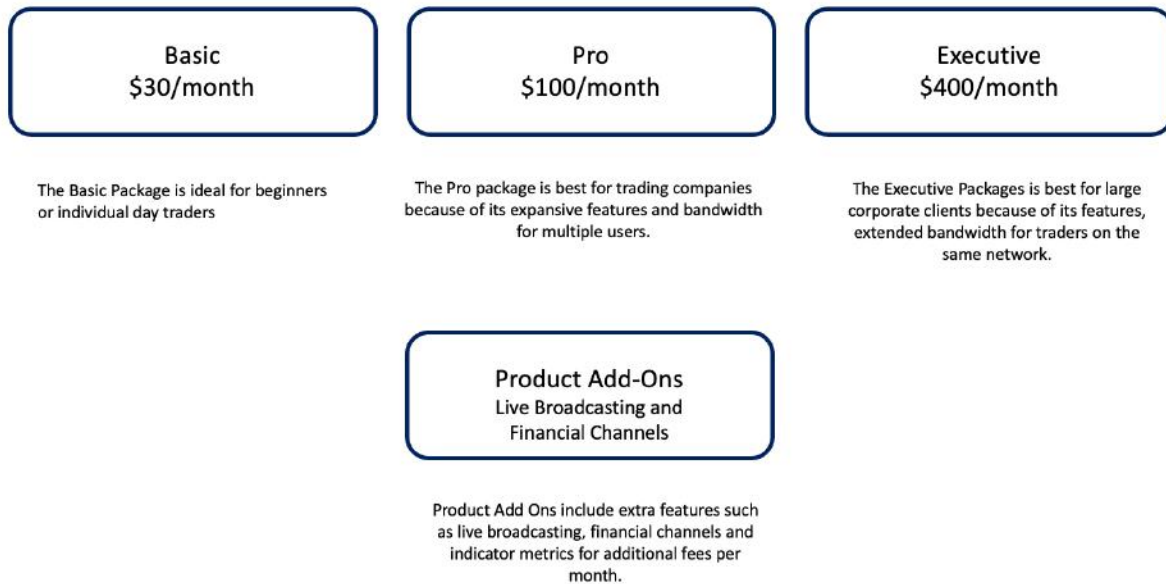
The product will benefit trading companies and corporate clients by enabling their traders and greater workforce to work without screens from anywhere, allowing greater flexibility and safety. Traders will be able to open unlimited charts in the virtual environment. Due to the COVID-19 pandemic, many workplaces have been forced to communicate remotely during a time of great stock market volatility.

Despite the greater purchasing power of large corporations in the market, individual traders are the prime targets for initial recruitment due to the interactive and portable/flexible experience the product offers to beginners and individuals.



6.3. Revenue Model

AXIS-Z will generate revenue from three different streams, individual traders, corporate clients and companies with trading services. **AXIS-Z** will utilize a tiered subscription model to sell the software. Each package has the option to upgrade the Product Add-Ons or be upgraded to a high tier package.



6.4. Go-To-Market Strategy

- | <i>Phase 1</i> | <i>Phase 2</i> | <i>Phase 3</i> |
|--|--|---|
| <ul style="list-style-type: none"> ● Obtain licenses for broadcasting applications ● Engage and recruit individual day traders for closed beta pilot ● Obtain critical mass of individual day traders in pilot target markets across Europe and the USA | <ul style="list-style-type: none"> ● Launch to Close Beta Pilot ● A/B testing begins ● Begin improvements based on pilot feedback ● Begin to contact corporate clients ● Scale up to ensure segments are satisfied, before launching into new markets | <ul style="list-style-type: none"> ● Expansion in existing markets (EUR and USA) ● Obtain critical mass of day traders in markets ● Attain corporate clients |



In order to successfully penetrate the market, **AXIS-Z** will begin working towards obtaining the relevant licenses to broadcast financial channels on the full version of the platform after an initial closed beta test.

AXIS-Z will conduct the aforementioned closed beta test with a small sample size of day traders in the initial target markets in Europe and the United States. A/B testing will be conducted in order to discover where the highest rates of adoption and ROI are. The object of said test will be to ensure product functionality and to obtain vital feedback for the improvement of the platform overall.

Upon making these improvements, **AXIS-Z** will be ready for a larger roll out of the product and will begin aggressive marketing efforts in order to acquire a critical mass of B2C users. Once they have attained this critical mass, the Company can pursue a recruitment strategy for trade processing clients and large-scale corporate clients.

The recruitment of high paying clients will facilitate the exponential scaling up of the number of users and features. This scaling up will also facilitate the Company's ability to begin to penetrate the US market utilizing a similar strategy of B2C → B2B recruitment.

6.5. Marketing Channels

6.5.1. B2C



To get the software intended for individual traders to be used as their primary trading platform, **AXIS-Z** will use advertisements, paid promotion PR campaigns and social media to publicize its product. **AXIS-Z** will seek publication of its proof of concept and success in financial publications and stock market trading news platforms to further increase exposure of the product.

6.5.1.1. Publications



AXIS-Z will promote itself through publications in financial and stock trading publications in order to create awareness among relevant peer-reviewed journals such as:

- The Economist⁶⁰

⁶⁰ <https://www.economist.com/>



- Bloomberg Businessweek⁶¹
- Technical Analysis of Stock and Commodities⁶²
- Barron's⁶³

6.5.1.2. Social Media



The marketing strategy is centered on social networking applications, sponsored campaigns, and sponsored advertising on popular sites such as Facebook and Twitter. By utilizing other social networks, **AXIS-Z** can gain directly access to the individual traders in the target markets.

6.5.2. B2B



Engagement with and sales to the prospective business-to-business competitors will be executed by a dedicated sales team who will sell the **AXIS-Z** charting systems directly to the companies and financial institutions that require them since they will require the system for widespread use by their traders. A sales team will be essential particularly in the early stages of each go-to-market as a way of establishing a core customer base in each target market. The sales team will also be used to secure licenses with different broadcast channels for the financial news needed for the platform.

6.5.2.1. Conferences



AXIS-Z will attend global exhibitions and conferences to gain exposure to professional day traders and investors.

However, with the continual spread of COVID-19, most organizers and participants are turning to virtual platforms to simulate traditional conferences and exhibitions. **AXIS-Z** will attend global, virtual events to receive exposure from key players in the field of stock trading instruments and discuss the industry's most recent innovations. Some exhibitions **AXIS-Z** can attend virtually or in person as the situation changes are outlined below:

- The Money Show Las Vegas (Las Vegas, NV)⁶⁴
- International Conference on Software and e-Business (Osaka, Japan - Dec 2020)⁶⁵
- TradeTech FX (Amsterdam, Netherlands)⁶⁶

⁶¹ <https://www.bloomberg.com/businessweek>

⁶² <http://traders.com/>

⁶³ <https://www.barrons.com/>

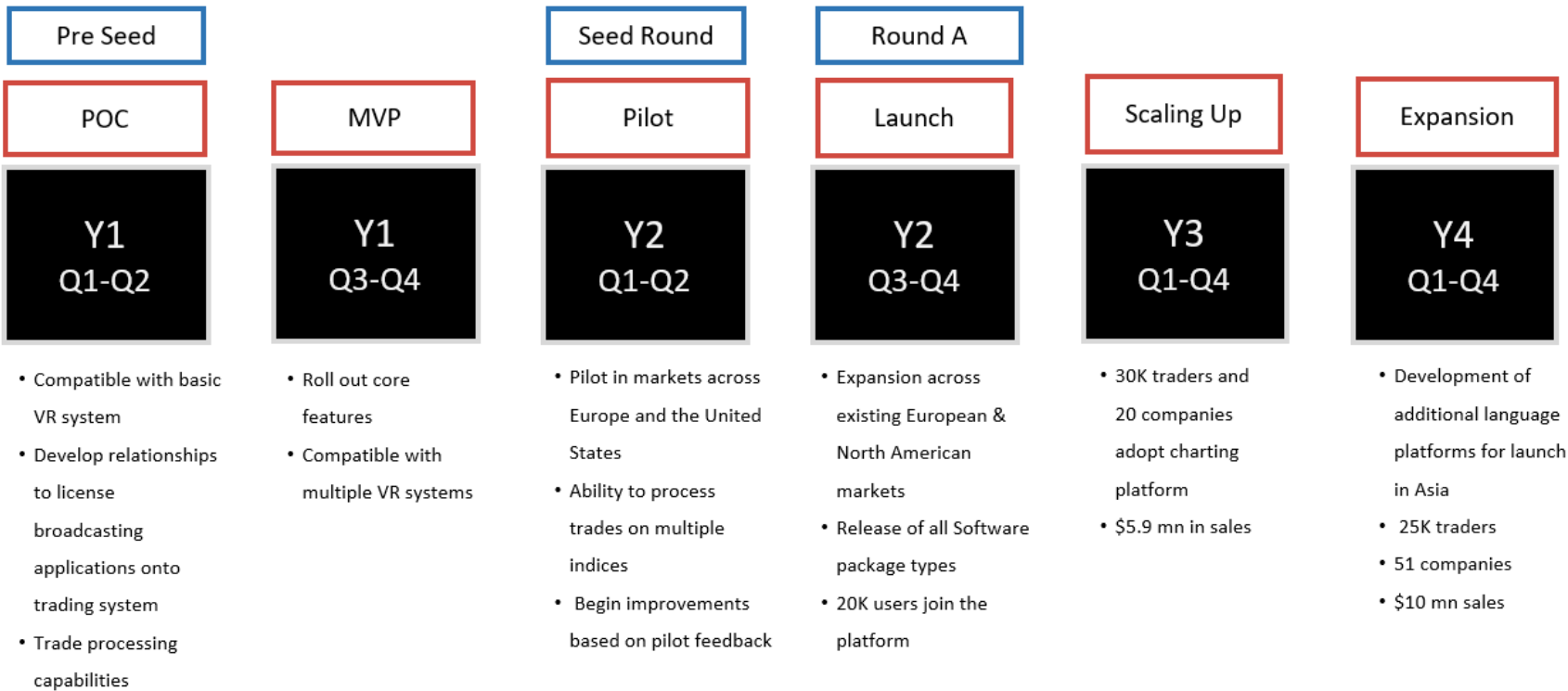
⁶⁴ <https://conferences.moneyshow.com/moneyshow-las-vegas/>

⁶⁵ <http://www.icseb.org/>

⁶⁶ <https://tradetechfx.wbresearch.com/>



6.6. Timeline



7. Financial Highlights

7.1. Working Assumptions

- Average Package Price: **\$88**
- Customer Retention: **29%**
- Business Retention: **76%**
- Average Cost per Acquisition: **\$182**
- Average Revenue per One-Time Customer: **\$2,112**
- Average Customer Lifetime: **24 months**

7.2. Financial Forecasts

7.2.1. Revenues

Revenues & Subscribers	Year 1	Year 2	Year 3	Year 4
Accumulated Basic Subscribers	-	5,618	22,818	51,485
Accumulated Pro Plan Subscribers	-	213	745	3,177
Accumulated Executive Plan Subscribers	-	\$ 13	\$ 13	\$ 36
Total Accumulated Subscribers	-	5,844	23,599	54,736
Revenue from Subscriptions Sold				
Revenue from Basic Packages	-	\$ 661,650	\$ 8,214,600	\$ 18,534,600
Revenue from Pro Packages	-	\$ 110,340	\$ 893,520	\$ 3,811,920
Revenue from Executive Packages	-	\$ 29,424	\$ 172,608	\$ 355,008
Total Revenue	-	\$ 801,414	\$ 9,280,728	\$ 22,701,528

*Details per the financial forecast can be found in the corresponding excel

7.2.2. Cash Flow Before Taxes

Cash Flow	Y1	Y2	Y3	Y4
Revenues	\$ -	\$ 801,414	\$ 9,280,728	\$ 22,701,528
CAPEX	\$ 45,750	\$ 60,750	\$ 29,250	\$ 40,500
General & Administrative	\$ 160,958	\$ 797,838	\$ 1,397,200	\$ 1,993,004
Marketing & Sales	\$ 90,500	\$ 1,802,706	\$ 4,928,936	\$ 7,897,841
R&D	\$ 219,000	\$ 714,000	\$ 1,003,800	\$ 1,564,650
Total Expenses	\$ 516,208	\$ 3,375,294	\$ 7,359,186	\$ 11,495,995
	-	-	-	-
Cash Flow Before Taxes	\$(516,208)	\$(2,573,880)	\$1,921,542	\$11,205,533

*Details per the financial forecast can be found in the corresponding excel



7.3. Investment Requirements

- 1. **AXIS-Z** is seeking an investment of **\$516K**
- 2. Company Pre-Money Valuation: **\$1.34 million**
- 3. **AXIS-Z** will offer its prospective investors **28%** equity
- 4. Budget Breakdown:

