







Volworks® sets a new standard by providing investors with unparalleled data-driven research, actionable insights, and customized trade recommendations to improve investment outcomes.

We do all this with our innovative web-based Equity-ETF Analytics and Options Strategies Platform combined with bespoke Investment Advisory and Consulting Services from seasoned Wall Street investment professionals.

- Clients can use the Volworks web-based platform directly or have the Volworks team of professionals do the work for them, generating customized reports, presentations, and trade recommendations.
- Volworks adds value for investors with equity exposure who:
 - Currently use options
 - Are considering incorporating options into their investment process
 - Invest primarily in stocks and ETFs



Who Benefits From Our Services and Solutions:

-  Family Offices
-  Registered Investment Advisors (RIAs)
-  Asset Managers
-  Chief Investment Officers & OCIOs
-  Hedge Funds
-  Institutional Investors

Business Model:

We offer tiered subscriptions, advisory and consulting mandates, white-label partnerships, and separately managed accounts.



Company Background:

Volworks® is a wealthtech and advisory research/consulting firm specializing in helping investors and advisors make better data-driven decisions for their equity and ETF investments. The Volworks platform was initially developed to help Volworks Founder manage equity portfolios for a family office client. While the initial focus was on using options strategies to improve outcomes, the platform has evolved into a leading equity analytics platform in addition to its powerful options capabilities, used daily by the Volworks team.

Our team has extensive experience in options trading, asset management, and software development. Volworks Founder Victor Viner previously led two SEC Registered Investment Advisory firms as CEO & CIO, including Volaris, a multibillion-dollar options-based firm with proprietary technology later acquired by Credit Suisse.

The Volworks Advantage:

No other platform, terminal, or advisory solution can match the combination of Volworks proprietary analytics, expert advice, and customized recommendations.

- Our advisory and consulting services, combined with our proprietary Equity-ETF analytics and options strategy platform, offer a one-of-a-kind integrated solution unmatched in the industry.
- Our technology platform does the heavy lifting for you. It provides relevant analytics via our interactive and exportable analytics reports, options strategies reports, and customized payoff charts & tables.
- You don't have to be a quant or investment analyst, learn a platform-specific programming language, or hire an expensive third-party implementation consultant to realize all the benefits of the Volworks Platform.
- Our **Contextual Expiration Returns™ (CERs)** help investors make data-driven decisions, giving them a much-needed edge. Our CERs also help investment professionals customize and determine the optimal option strategy, risk/reward trade-offs, and timing for implementation.
- Unlike option trading platforms that focus on options prices, Volworks analyzes and presents an array of options strategies, with the relevant return and probability metrics combined with our proprietary payoff and price graphs to help investors make the best decisions based on their unique **Risk, Return, & Regret®** Profile.
- Our Option Positions Management Solution manages option positions in real-time. It provides key return, risk, and percent of max profit metrics, helping managers and advisors manage and adjust positions optimally.

Problems We're Solving:

- 1** Investors are drowning in generalized data and generic research. Investors need customized data and research that lead to actionable insights.
- 2** Most investors and analysts rely on spreadsheets to model and analyze data. This process is inefficient and isn't scalable.
- 3** Most investors and advisors underutilize options and incorrectly perceive them as too risky.
- 4** The investment industry has many excellent technology solutions and solid advisory firms, but no firm excels at both - until now.

Investment Objectives Our Solutions Address:

Boosting and amplifying returns

Income and yield enhancement

Hedging strategies

Creating customized portfolios

Speculation and identifying statistically favorable trades

Sector SPDR ETFs Allocation Recommendations

VOLWORKS PLATFORM

The Volworks Equity-ETF Analytics and Options Strategies Platform Sets a New Standard for Investors with Our Data-Driven Insights That Lead to Better Outcomes

No other platform or financial data terminal can match the combination of Volworks proprietary investment analytics, customized options strategies and reports, plus insightful charts and graphs

Developed For: Family Offices, Financial Advisors, Wealth Managers, Institutional Investors, Hedge Funds, CIOs

Investment Objectives

- Return Enhancement
- Return Amplification
- Yield Enhancement
- Income Generation
- Downside Protection
- Sector Allocations
- Opportunistic
- Statistically Favorable
- Defensive Portfolios
- International Diversification

Options Strategies+

- Covered Calls
- Boosters
- Put Spread Collars
- Booster Collars
- Put Writes
- Risk Reversals
- Amplified Returns
- Strangles
- Butterflies
- Short Collars

Equity & ETF Analytics

- S&P 500, SPDR Sector ETFs, Non-US ETFs
- Returns 1D, 5D, 1M, 3M, 6M, 12M, 3Yr, 5Yr
- Expiration Returns Updated Daily for Every Option Expiration
- Percentile Ranking of Expiration Returns
- Moving Averages, RSI
- Beta, Downside & Upside Beta, Drawdowns
- Implied Probabilities
- Implied and Historical Volatilities
- Vol Surfaces & Skew
- Earnings Studies

Return & Risk Reports

- Trailing Returns
- Rolling Returns
- Monthly Returns
- Contextual Expiration Returns™
- Quarterly Returns
- Annual Returns
- Performance Returns Stock vs SPY & SPDR ETF
- 1H vs 2H Semi-Annual
- Risk Metrics
- Exportable to Excel & PDF

Interactive Tools

- Option Strategies Payoff & Tables
- Price & Performance Charts
- Earnings Analysis
- Correlations
- Queries
- Rolling Returns
- Advanced Screeners
- Custom Reports and Views
- Rating Strategies
- Option Position Management

