

# N Neontra



Neontra is our fully-featured consumer PFM, showcasing TXIO Technology capabilities.

Try it at: [neontra.com](https://neontra.com)

## MAIN PRODUCT FEATURES

### Data Aggregation

Neontra automatically retrieves and aggregates personal data, creating a 360 degree view of financial life

### Personalized Insights

Neontra's proprietary AI analyzes financial data, then creates insights and analyses that are personalized for every client

### Budgeting

Neontra makes it easy to create a budget, so your clients spend less time worrying about their money

### Goals

Set financial goals and track progress over time

### Financial Health Check

Evaluate overall financial health with the Neontra healthcheck scorecard

### Spend Analysis

Follow every Dollar, Euro or Pound. Track and analyze spending, and identify ways to save

### Investment Tracking

Neontra aggregates all investments in one place. Measure performance over time. Forecast growth scenarios.

### Forecasting

Predict the future with Neontra's sophisticated forecasting technology

## KEY BENEFITS



Supports aggregation from third-party data sources, giving a complete financial view



Data-driven, transparent consumer experience, relevant to new and growing young demographic



Drives and promotes daily engagement and accessibility



Securely connects to over 100+ financial institutions



Monitor any account type, investment or asset in any currency



Lower Client Acquisition Cost (CAC) through platform automation and innovation



Innovative iPhone, Android and Web apps so customers can plan for a better financial future in real-time on any device

TXIO TECHNOLOGY

# Proven & Scalable

TXIO technology has been deployed in production with our clients since 2012.

**200+**

MILLION TRADES  
PROCESSED SINCE 2012

**27+**

INTERNATIONAL  
JURISDICTIONS

**150,000**

FINANCIAL INSTRUMENTS  
IN OUR PRODUCT MASTER

**24/6**

TRADING FOR LIVE  
AND GREY MARKETS

**11+**

DOMESTIC AND FOREIGN  
ACCOUNT CURRENCIES

**99.999%**

ANNUALLY MEASURED  
UPTIME

**Mobile**

IN APP AND PLAY STORES  
SINCE 2013

**SOC2**

CERTIFIED SINCE  
2018 (BDO AUDITORS)

**Licensed**

SEC, FCA, BAFIN, ESMA AND  
IIROC REGULATED FIRMS

**THANK YOU**