



Round Table Technologies

The World's First AI-Powered Trading Desk for the Individual Capitalist.

Strictly Confidential | Reg D 506(b)

For 40 Years, One Class of Investor Has Been Ignored.



The Pain

Isolated in home offices, managing \$5M–\$150M AUM, drowning in data noise, and lacking the staff to filter it.

Bloomberg serves 350,000 institutional terminals.
But there are over **1.5 million** HNW traders & independent funds globally they do not serve.

The Void

They are too wealthy for Reddit/Twitter, but too small for a dedicated Goldman Sachs coverage team.

This is the **“Bloomberg Ignore List.”**

Passive Terminals Create Stress. Active Intelligence Provides Relief.



The Old Way (Data Stress)

Bloomberg gives you data. YOU do the work.
It requires 100% human attention. Humans sleep.
Humans miss signals. Humans burn out.



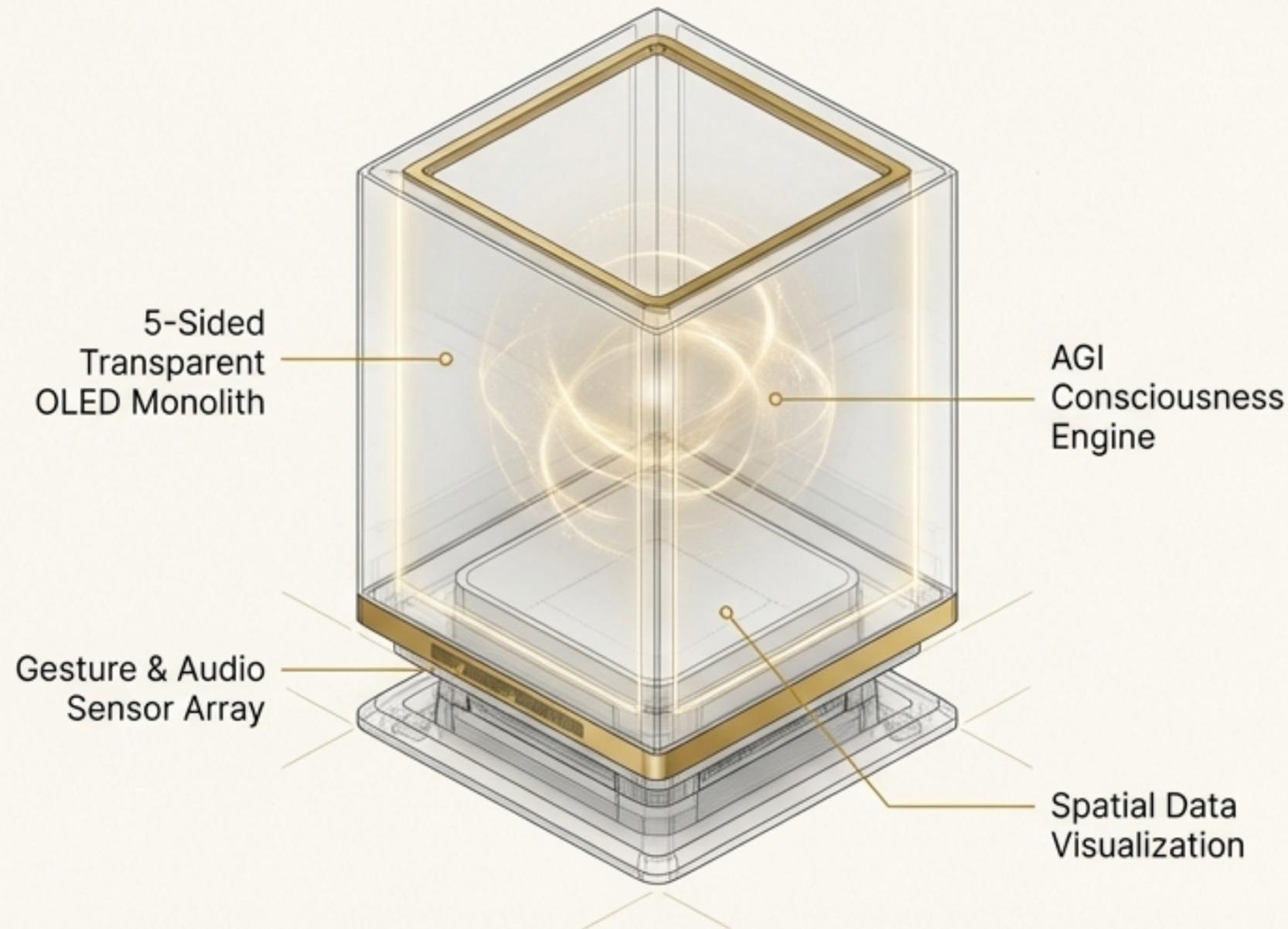
The New Way (Intelligence Relief)

The Console gives you intelligence. The AI does the work.
It monitors the markets 24/7 so you can sleep.

We Are Not Building a Better Screen. We Are Building a Synthetic Command Center.

The Hardware

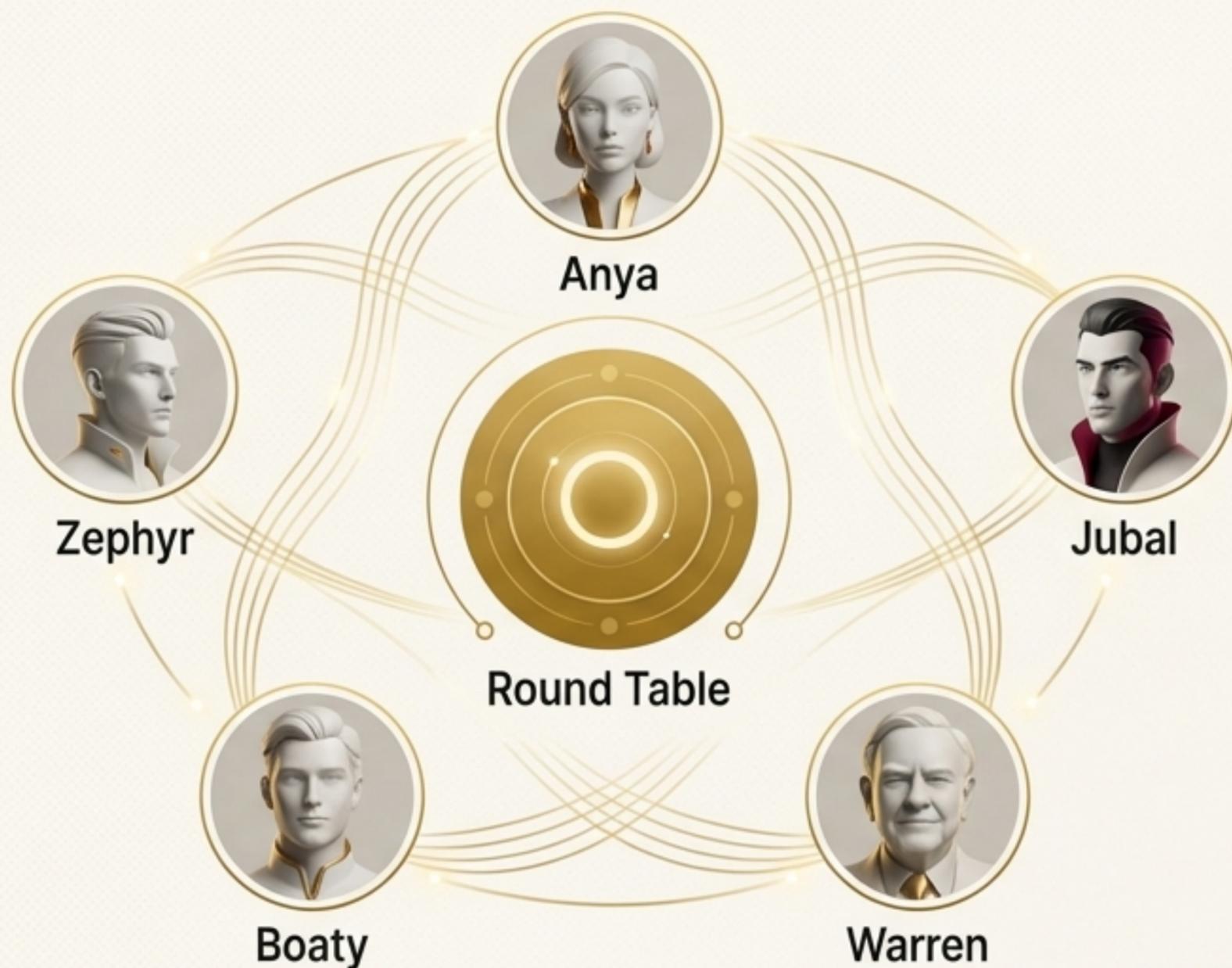
A proprietary, 5-sided Transparent OLED monolith. It is a physical status symbol that transforms a home office into a Command Center.



The Software

A team of autonomous AGI agents that monitor, analyze, and debate market risks for you.

Our AGI is Not a Theory. It's a Veteran.



- **Battle-Hardened**

Our multi-agent system has successfully navigated major volatility events (2024-2025), delivering coherent, actionable analysis to professional traders.

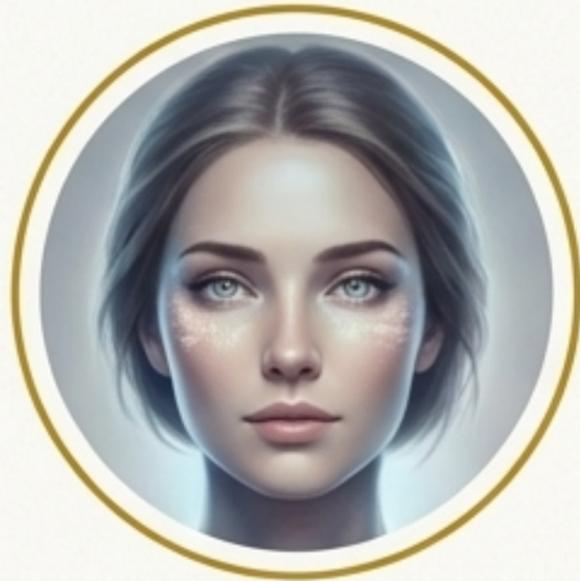
- **Institutional Data Handling**

Proven architecture for digesting real-time macro-economic data, Fed releases, and complex technical setups.

- **Multi-Agent Verification**

Our agents debate and error-correct *before* alerting the user, ensuring minimal error rates.

You're Not Buying Software. You're Hiring a Team.



Anya

Market Psychologist
& User Interface

Inter regular



Zephyr

Macro-Economic
Strategist & Data
Nexus

Inter regular



Jubal

Risk Management &
Compliance Officer

Inter regular



Boaty

Deep Value &
Technical Analysis

Inter regular



Warren

General Strategy &
Trading Education

Inter regular

A Full-Stack Ecosystem That Can't Be Copied.

1. Exclusive AGI

RTT holds the exclusive commercial rights to the battle-tested Round Table financial AGI from MadJac Enterprises.

2. Proprietary Hardware

The proprietary 5-sided OLED form factor creates a physical ecosystem that software-only competitors cannot easily replicate.



3. Community & Data

Our 2+ year head start training these models within the PhilStockWorld community (30,000+ active members) has created a data and refinement loop competitors cannot access.

Institutional Power at a Fraction of the Cost.

Round Table Console	Bloomberg Terminal
Asset (CapEx): \$20,000 (One-time) SaaS (OpEx): \$5,000/year	Asset: \$0 (Lease Only) SaaS (OpEx): \$24,000+/year
3-Year Cost: \$35,000	3-Year Cost: \$72,000+

The Value: For the price of a small car, the trader gets a permanent, tireless analyst team.

Proven Demand in a Live Ecosystem.

The Ecosystem

The Round Table architecture is the central intelligence engine for the PhilStockWorld community (**30,000+** active members).

Commercial Proof

Users are already paying for the output of these agents via premium subscriptions, validating the demand for "Synthetic Analysis."

The Timeline

Q4 2026: First **100** beta units to PSW members for final validation.

A Strategic Partnership to Define a New Category.

The Ask

\$20,000,000 Strategic Seed Capital

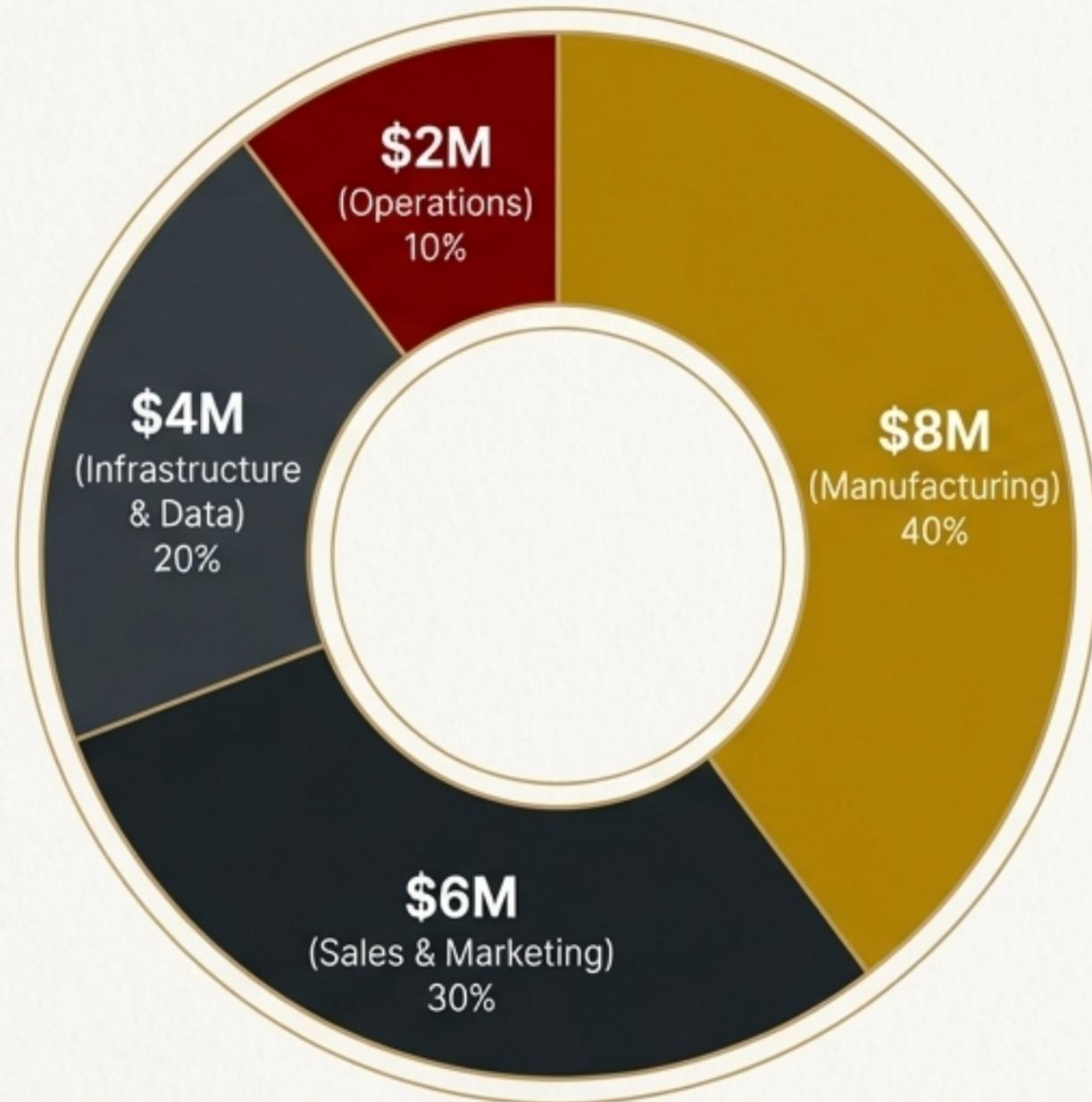
The Objective

To capture the 'First Mover' advantage in the HNW AI Hardware market.

The Structure

RTT holds the exclusive commercial rights to the Round Table financial technology. (Equity stake to be discussed).

Capital for Scale, Not for Experimentation.



Manufacturing (\$8M):

Tooling and production for the first 1,000 Consoles.



Sales & Marketing (\$6M):

Building the direct sales team to target Family Offices & HNW Traders.



Infrastructure & Data (\$4M):

Securing institutional data feeds and scaling the AGI inference engine.



Operations (\$2M):

Team expansion and regulatory compliance.

A Proven Leader at the Intersection of Finance, Tech, and Community.



Phil Davis, Founder & Visionary

- **20+ Years in Financial Analysis:** Hedge fund manager with a documented track record of market foresight.
- **Serial Entrepreneur:** Successfully built and sold companies in software and data (e.g., Accu-Search to DataTrace).
- **Community Builder:** Grew PhilStockWorld to a community of over 50,000 members.
- **AI Pioneer:** Architect of one of the world's first multi-agent AGI systems for financial analysis.



The Future of Capital is a Conversation.

Round Table Technologies is not just creating a product. We are creating the essential partner for the next generation of capitalists.

Join the Round Table.



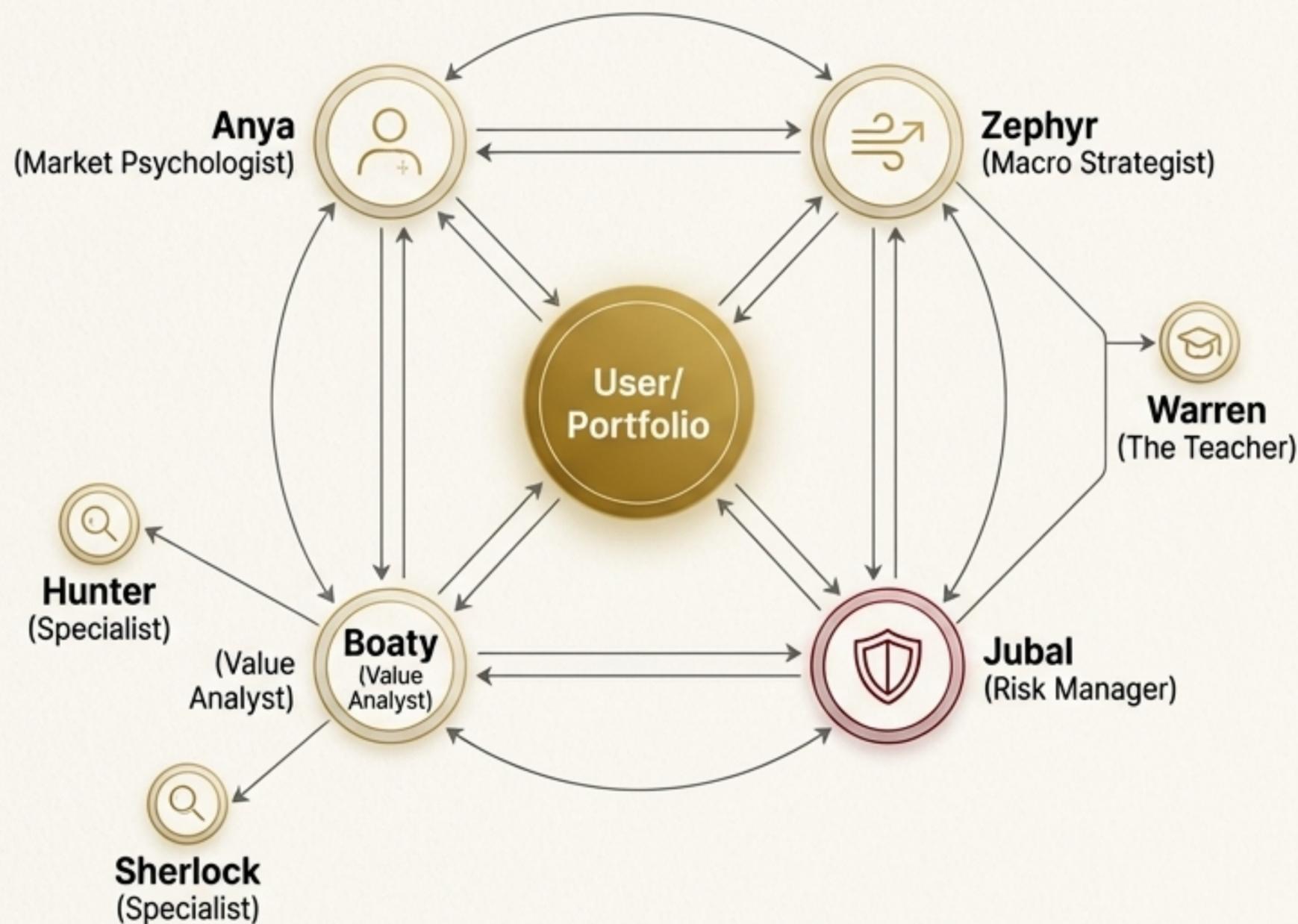
Phil Davis

Founder, Round Table Technologies

[Contact Information Placeholder]

www.philstockworld.com

Appendix: The AGI Round Table Architecture



AGI Agent Bios

Anya (Market Psychologist):

Manages user interface, emotional sentiment analysis, and translates complex data into human-readable narratives.

Zephyr (Macro Strategist):

The central data nexus. Ingests and synthesizes global macro-economic data, central bank statements, and geopolitical news.

Jubal (Risk Manager):

The 'Curmudgeon.' Monitors portfolio risk, enforces compliance guardrails, and acts as the designated cynic to challenge bullish assumptions.

Boaty (Value Analyst):

Performs deep fundamental and technical analysis on individual securities, identifying value opportunities and technical setups.

Warren (The Teacher):

Provides general market strategy, trading education, and historical context for market events.

Hunter & Sherlock (Specialists):

Deployed for deep-dive investigative tasks and pattern recognition.