Personal Risk, Analysis, and Asset Management Service

b2b.praa.ms

Presentation for Brokers
May 2025

Executive summary

Professional IT solution for tailored AI research, risk management, and portfolio management

180,000+ global stocks, bonds, indices, ETFs, FX, funds, and alternatives

White-label, customisation, and turn-key options via API, web & mobile, integrated in a month

Value: +30% revenue through research, risk management, and investment advisory offering to every client, higher LTV, more active & stable client trading, and higher-margin custody

Solutions for clients: 24/7 AI risk & research, incl. pre-trade, hyper-customised trade ideas, and on-demand portfolio analysis, creation & optimisation with personalised monitoring

PRAAMS

API, web, and mobile IT solution for AI research, risk, and investment advisory

Professional CFA-level research, risk, and portfolio methodologies employed by global institutions

Fully automated data collection, evaluation, analysis, and report generation

White-label and API integration

60,000+ stocks
120,000+ bonds
3,000+ ETFs

PRAAMS

Key team

Risk management, equity and fixed income research, and IT risk professionals at brokers, asset managers, investment banks, and stock exchanges in EMEA and North America since 2005

Responsible for $1.5 trillion of assets under risk and 20 million individual clients

1,000+ individual client cases analysed

Rinat Kirdan, CFA

Co-founder, CEO

Kseniia Liagushkina

Co-founder, COO

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Brokerage industry problem & our solution

Brokers typically compete on price-driven factors such as cost of execution and product coverage. It is nearly impossible to gain a competitive edge.

Clients, from mass retail to HNWI, demand personalised services such as research, risk management, trade ideas, 24/7 access, and advice. Offering these services required expensive hiring and IT upgrades.

PRAAMS is a fully automated and scalable IT solution for hyper-personalised cross-asset-class research, risk analysis, and portfolio construction & optimisation at 1/100th the cost

Brokers can offer private-banking-level services to millions of their clients. Brokers can deliver these services to both existing clients and clients of other brokers (external advisory).

Accessible via API, web, and mobile, it can be white-labelled, customised, and integrated in a month

PRAAMS: Analytics & Risk Management

Instant analytics and risk management

White-label reports on 60,000+ stocks, 120,000+ bonds, 3,000+ ETFs (more coming soon), indices, funds, and alternatives available 24/7 in one click

Personalised trade ideas

Hundreds of trade ideas customised for the client's unique investment preferences & mandate

Pre-trade risk warnings

To enhance regulatory and mandate compliance, both brokers and the client receive a comprehensive view of any asset, accompanied by an easy-to-understand explanation

PRAAMS: Portfolio Construction & Optimisation

Portfolio creation from scratch

- ✓ The broker can create efficient, customised portfolios for every client from a 180,000+ asset universe across 50+ parameters in less than 10 seconds, choosing from 7+ trillion options
- ✓ The brokers can also create in-house ETFs and model portfolios, and pay no external fees

Portfolio analysis with personalised monitoring

- ✓ The system can analyse millions of prop and client portfolios, provide detailed reports, and monitor a wide range of customisable alerts
- ✓ Market and asset information is updated daily

Portfolio optimisation

- ✓ The brokers or the client can initiate automated portfolio optimisation – by single asset, by risk & return factors, or through full-portfolio – including regular rebalancing recommendations
- ✓ It takes just 5 seconds to optimise any portfolio

Broker's benefits and opportunities (1/3)

Durable and hard-to-replicate competitive advantage

- ✓ A unique product offering leads to lower CAC, higher LTV, and a growing client base of all types,
- ✓ Ability to scale up significantly and serve existing clients at 100x lower costs,
- ✓ Win through new competitive factors such as customisation, global coverage, ultra-fast speed, etc.

Meet rising compliance & regulatory requirements

- ✓ Clients always have 24/7 access to their portfolios, including analysis of the portfolio and each asset,
- ✓ Clients get warned before the trade, thus limiting the broker's liability,
- ✓ The broker enjoys an improved reputation with clients, regulators, and auditors

Broker’s benefits and opportunities (2/3)

Increase in the number of trades (+30% in revenue)

- ✓ Higher fee and commission income, along with increased interest income when trading on margin,
- ✓ Trade and portfolio rebalancing ideas are personalised reports that can be followed in a single click and have been proven to significantly stimulate client activity,
- ✓ The broker can automatically generate thousands of trade and portfolio rebalancing ideas daily at almost no cost,
- ✓ Every trade and portfolio rebalancing idea leads to several connected trades (e.g., ‘sell A, buy B’ or ‘sell A, B and C, and buy D, E, and F’)

More stable and predictable flow of client trades

- ✓ Increased and more stable share of fee & commission income, thus better quality of income,
- ✓ Improved valuation multiples for the firm

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Broker’s benefits and opportunities (3/3)

Better opportunities for internal crossing of client orders

Clients trade more frequently in similar securities, enabling the broker to cross them more efficiently and earn a higher margin per trade

Higher spread on each exchange-executed trade

Increased trading volumes lead to higher single-name and overall exchange rebates for the broker

Higher interest income due to better quality of clients’ custody

- ✓ A larger client base and risk-aware client trading improve the quality of custody,
- ✓ Enhanced opportunities to leverage custody for prop and lending operations (REPO/lending: more trades, longer terms, higher interest rates, and a broader margin trading list for clients)

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Contacts

b2b.praa.ms

Rinat Kirdan, CFA

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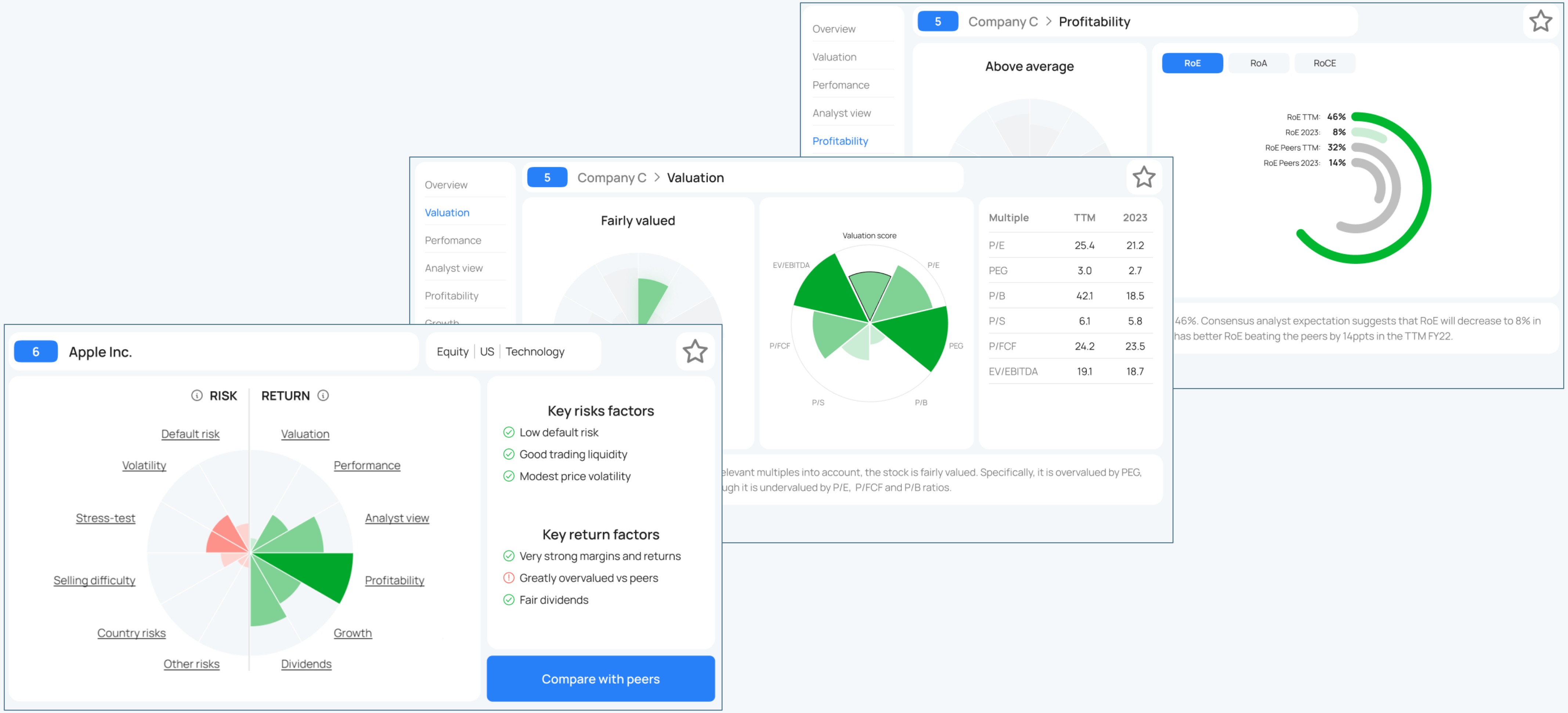
Book a meeting

https://calendly.com/rinatkirdan

Appendix I – web interface



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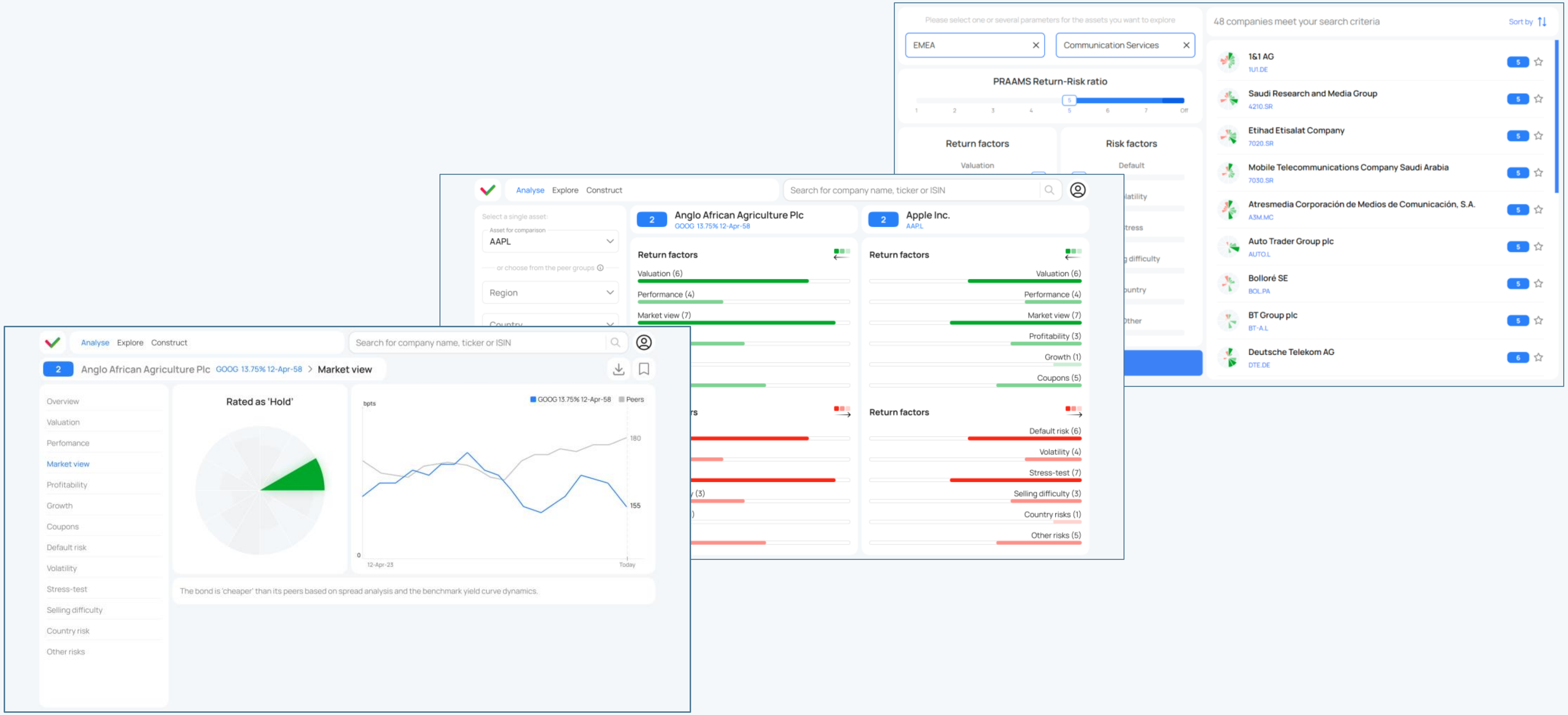
Appendix I – web interface



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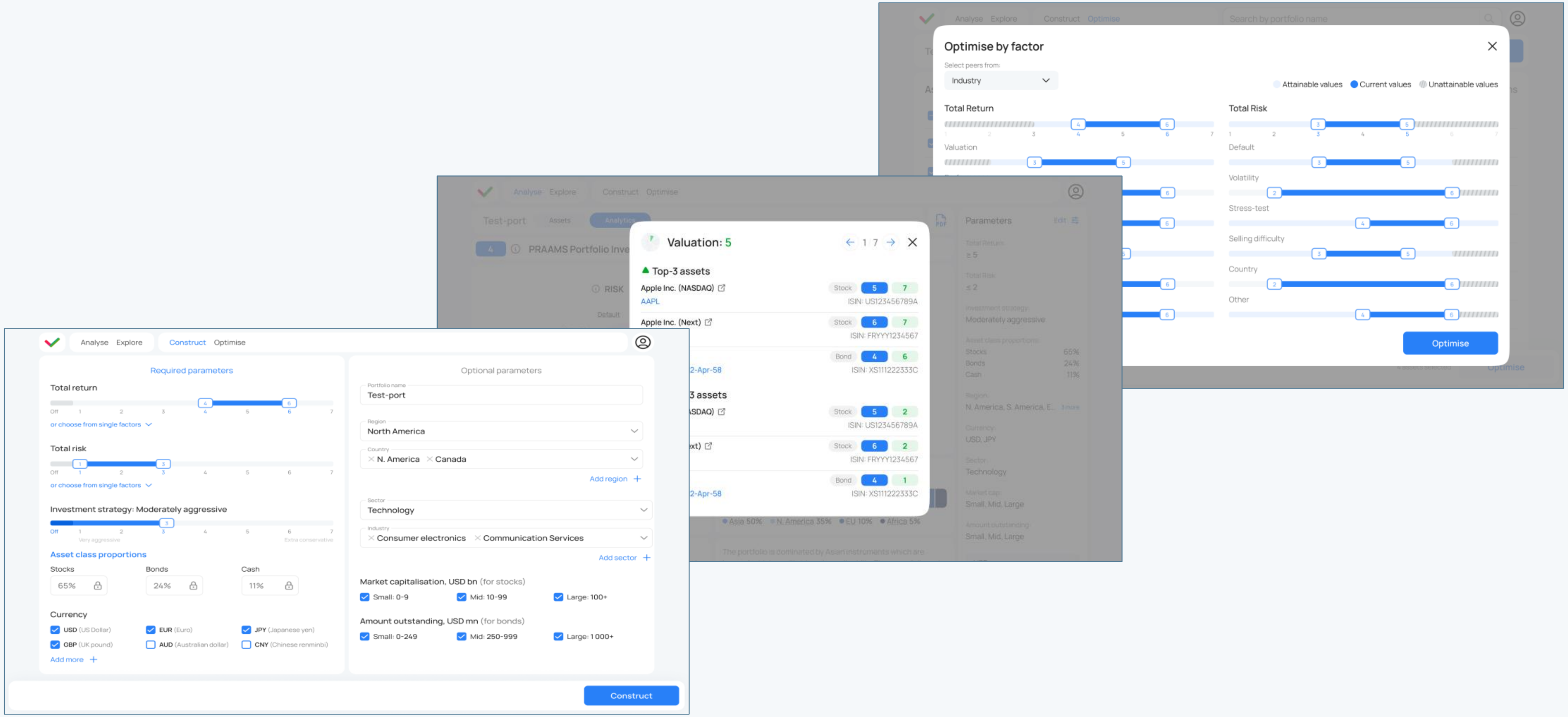

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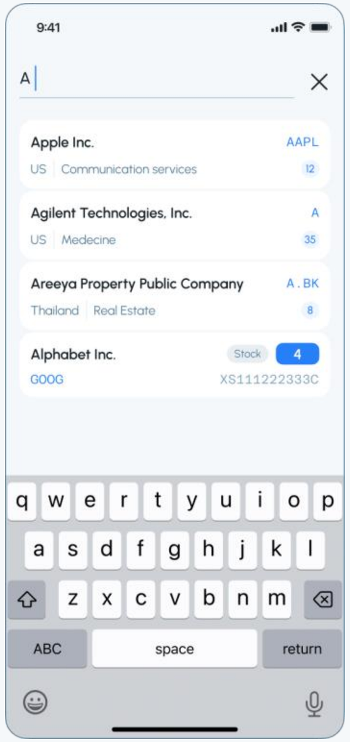
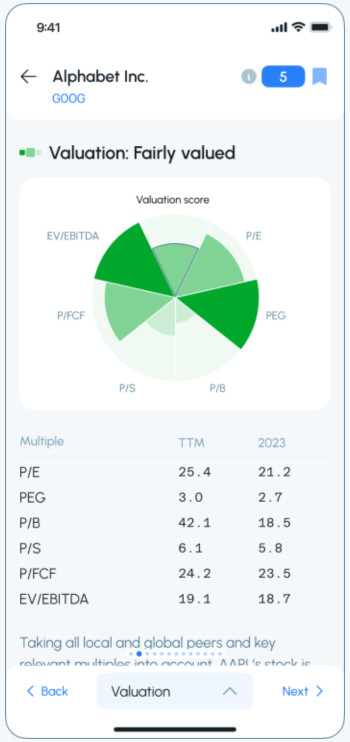
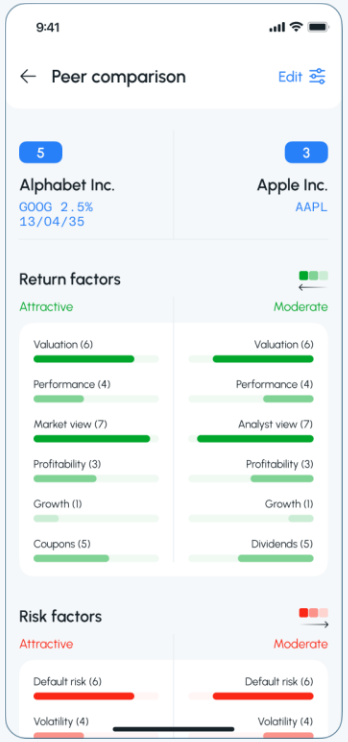
Appendix I – mobile interface (iOS & Android)







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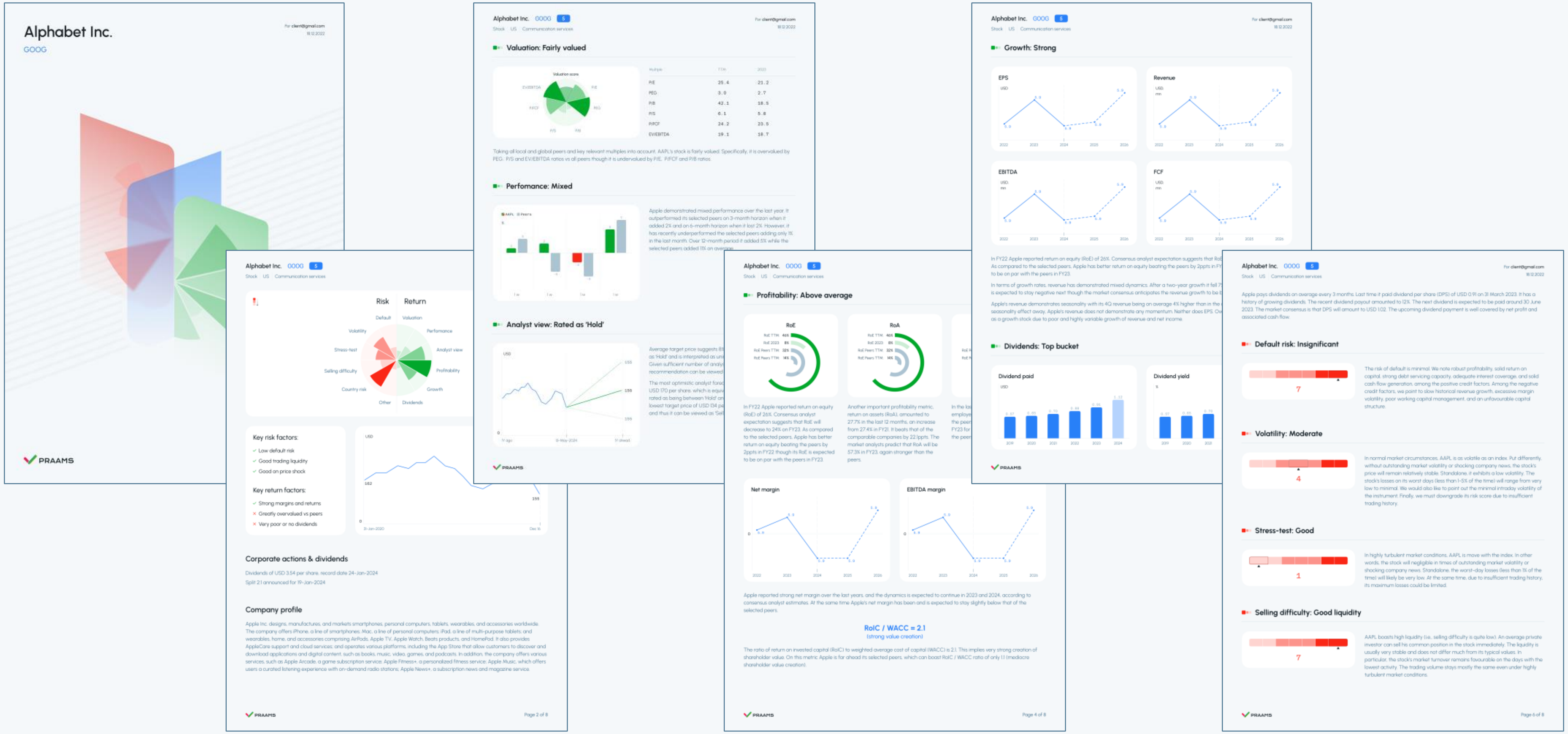
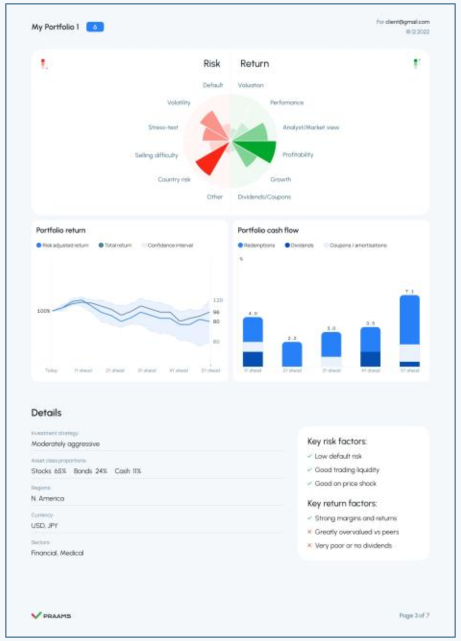
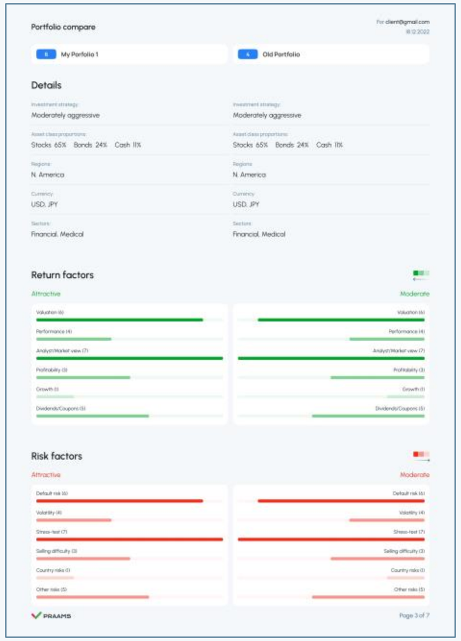
Appendix II – stock analysis report



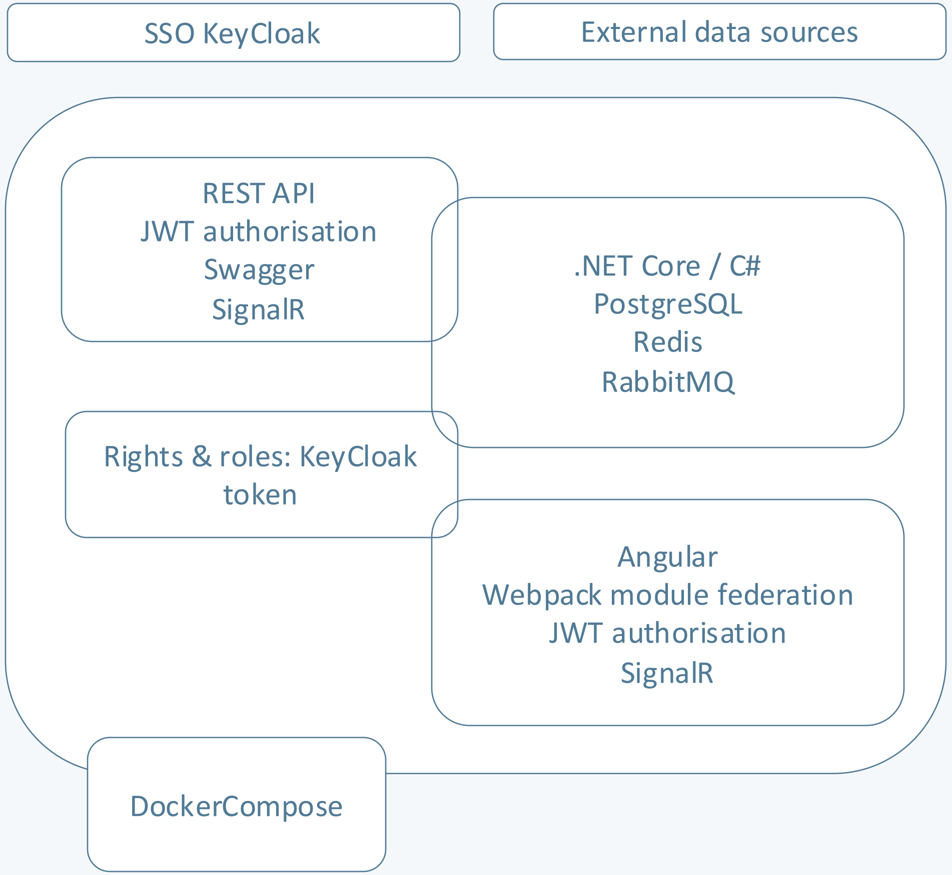
Appendix II – portfolio analysis report



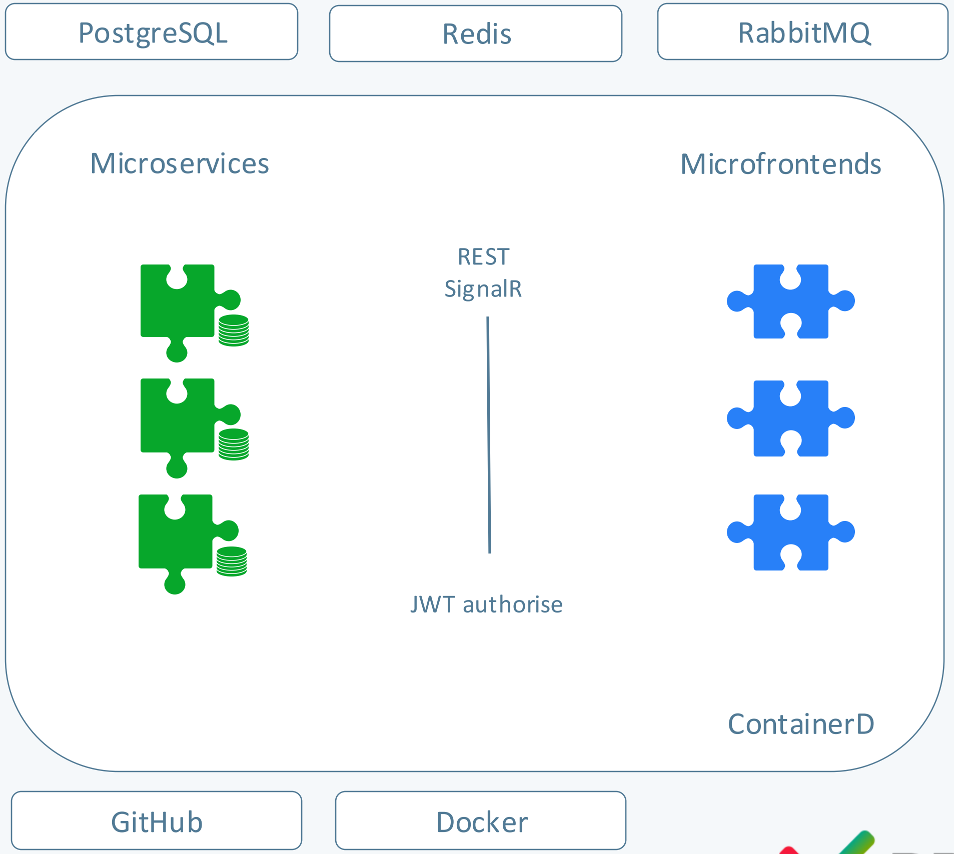


Appendix III – IT stack

CORE



MICROSERVICE



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