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INVESTOR REFERENCE

Investment Model Overview

A professional summary of how CoreStack Nexus organizes investor capital across AI-assisted trading, treasury reserve, cryptocurrency access, and selected private-market opportunities.

Prepared for investor review

Current investor structure

CAPITAL LAYERS
4
Trading, reserve, digital asset, and private-market sleeves.

MODEL STATUS
Active
Structured records visible through investor resources.

HIGHEST TARGET
120%
Current top target range shown by published products.

Important: this document is an overview for review and communication. It does not replace product terms, account records, risk review, verification requirements, or platform notices.

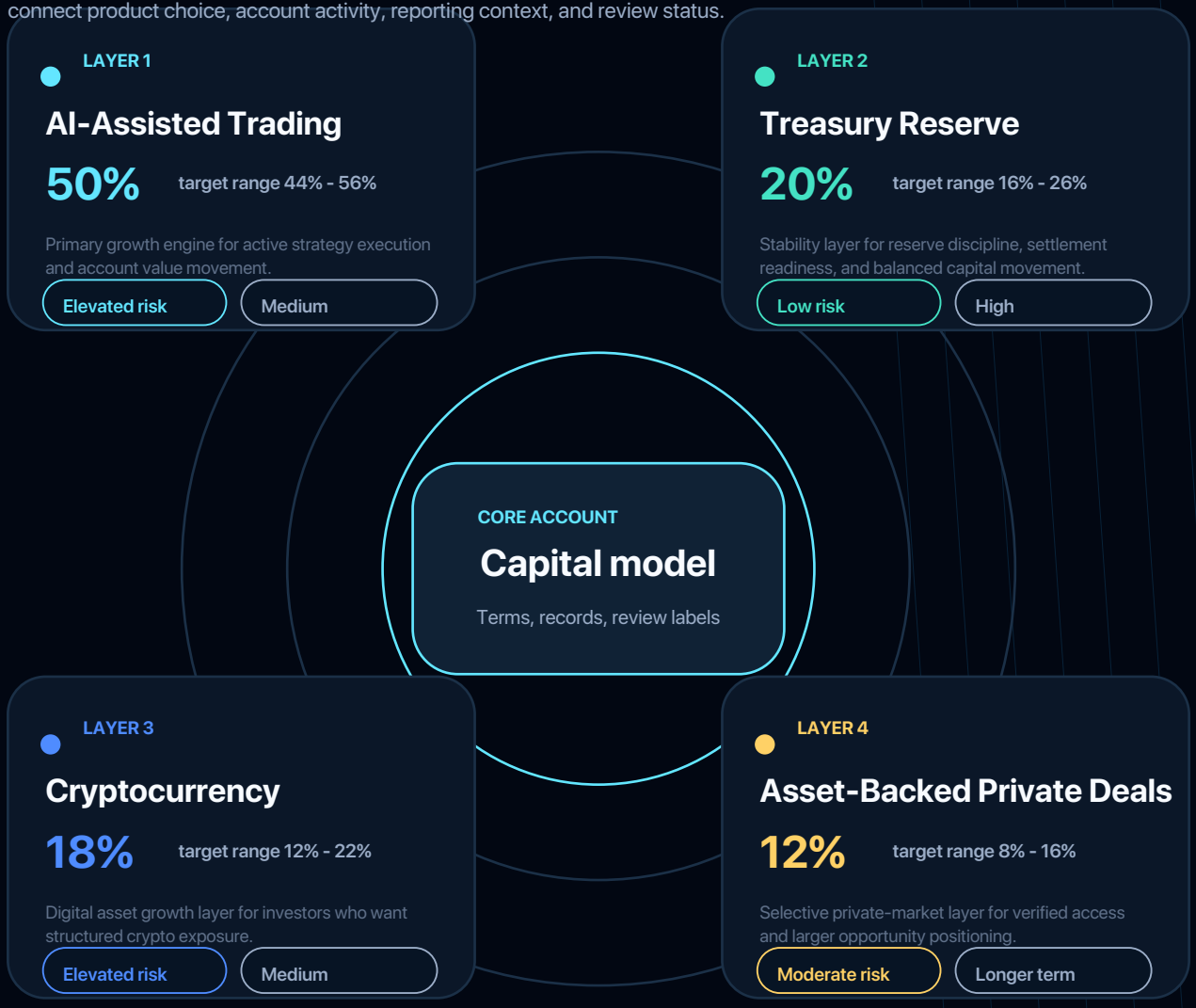
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INVESTMENT STRUCTURE

One account, four ways capital can work

The model separates active trading, reserve discipline, digital-asset access, and selected private-market exposure so investors can understand the role of each sleeve.

The structure is designed to make portfolio exposure easier to read. Each sleeve has a specific purpose, while investor records connect product choice, account activity, reporting context, and review status.



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CAPITAL VIEW

Allocation records by sleeve

Current public allocation records show role, target position, risk profile, liquidity expectation, and purpose. These are planning references, not a guarantee of exact account composition.



AI-ASSISTED TRADING

50% target 44% - 56%

Primary growth engine for active strategy execution and account value movement.

Elevated risk | Medium liquidity

TREASURY RESERVE

20% target 16% - 26%

Stability layer for reserve discipline, settlement readiness, and balanced capital movement.

Low risk | High liquidity

CRYPTOCURRENCY

18% target 12% - 22%

Digital asset growth layer for investors who want structured crypto exposure.

Elevated risk | Medium liquidity

ASSET-BACKED PRIVATE DEALS

12% target 8% - 16%

Selective private-market layer for verified access and larger opportunity positioning.

Moderate risk | Longer term liquidity

Investor interpretation: allocation percentages explain the intended role of each layer. Final account exposure can vary by product selection, active capacity, funding timing, reinvestment, liquidity profile, and platform review.

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PUBLISHED PRODUCT EXAMPLES

How investors compare current plan terms

The model becomes useful when investors can compare target return, term, entry amount, risk, and liquidity before placing capital.

PRODUCT	TARGET	TERM	RANGE	RISK / ACCESS
Nexus AI Income Engine AI trading	26.50%	45d	$500 - $100,000	Elevated Limited
Treasury Freedom Reserve Treasury	12.50%	30d	$250 - $50,000	Moderate Medium
Nexus Legacy Reserve Treasury	38% - 52%	6mo	$5,000 - $250,000	Low Limited
Nexus Wealth Compounding Note Treasury	85% - 120%	12mo	$10,000 - $500,000	Moderate Locked
Crypto Momentum Access Crypto	45% - 56%	15d	$1,500 - $120,000	Moderate Limited
Private Deal Access Circle Private deal	48.00%	90d	$5,000 - $300,000	High Locked

Target returns should always be read beside risk, liquidity, term length, account status, and product availability. Higher target ranges usually require stronger risk tolerance, limited access, locked timing, or a longer maturity window.

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INVESTOR CLARITY

How to read the model before deciding

The investment model is intended to make account records easier to understand. It should be reviewed together with product terms, account status, current notices, and verification requirements.

Target returns

Target returns describe intended product outcomes. They are not guarantees, fixed promises, or assurances of future performance.

Access and capacity

Products can be limited by funding status, verification, account review, capacity, and current availability.

Risk fit

Investors should review term length, liquidity profile, target range, risk level, and account status before placing capital.

Reporting

Account records connect product terms, activity, performance context, and review labels in plain terms.

DOCUMENT BASIS

This overview is based on CoreStack Nexus investor resource material, public product information, allocation records, and due-diligence content available through the investor resource pages.

Document version: Public summary

Related document: Capital Allocation Statement