

THE WEALTH UPGRADE CAPITAL

Executive Summary

Sonic AI Automated Gold Strategy

Version 1.0
Prepared for executive-level due diligence
Confidential · Prepared for prospective investors only

PURPOSE

Why this opportunity warrants further review

An independently verifiable automated XAU/USD investment strategy, executed through individually owned brokerage accounts, with transparent third-party performance reporting since November 2024.

KEY INVESTMENT CHARACTERISTICS

At a glance

STRATEGY

Sonic AI — systematic, rules-based, XAU/USD only.

STRUCTURE

Individually owned TAG Markets brokerage accounts. No pooled capital, no custody by The Wealth Upgrade Capital.

REGULATORY STATUS

TAG Markets, operated by T.M. Financials Ltd, is officially listed by the FSC Mauritius as an Investment Dealer; licence number confirmation is pending. Company No. C185265.

HISTORICAL PERFORMANCE

Track record since November 2024

Nov 2024

Track record since

+27.64%

Cumulative gain

0.86%

Current drawdown

Sourced from the public Myfxbook record (myfxbook.com). Past performance does not guarantee future results.

RISK OVERVIEW

Considerations before proceeding

MARKET EXPOSURE

The strategy operates exclusively within the XAU/USD market and is exposed to the price movements of that market.

ACCOUNT-LEVEL ISOLATION

Each investor's account is individually held and independently exposed to market risk; no capital is pooled across investors.

LONG-TERM PERSPECTIVE

The strategy is intended to be evaluated over a long-term horizon rather than by reference to short-term performance fluctuations.

REGULATION & INSURANCE

What has been verified

REGULATORY STATUS

Trading is conducted through TAG Markets, operated by T.M. Financials Ltd. T.M. Financials Ltd is officially listed by the FSC Mauritius as an Investment Dealer; licence number confirmation is pending.

INSURANCE

Policy No. TT2603133 · Coverage Limit USD 1,000,000. Insurance documentation is available for review during the due diligence process.

DUE DILIGENCE RESOURCES

How to verify independently

PUBLIC MYFXBOOK RECORD

Continuously published trade-level performance data. [View the record.](#)

MT5 VIEW-ONLY ACCESS

Real-time, read-only view of trading activity, provided during due diligence.

NEXT STEP

Where to go from here

Read the Investment Overview for the complete investment process, or begin a suitability discussion directly.