

THE WEALTH UPGRADE CAPITAL

Sonic AI Automated Gold Strategy

Independent Research. Institutional Execution.

Prepared by The Wealth Upgrade Capital
Confidential · Prepared for prospective investors only
Version 1.0 · Publication Ready

INVESTMENT OVERVIEW · 02/8

The Opportunity

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

02 INVESTMENT OPPORTUNITY

An automated XAU/USD strategy, executed through individually owned brokerage accounts, with performance independently verifiable through a public track record since November 2024.

03 WHY THIS STRATEGY EXISTS

The strategy applies a systematic, rules-based approach to XAU/USD execution, removing discretionary decision-making from day-to-day trade execution while keeping account ownership and control with the investor.

04 HISTORICAL PERFORMANCE SUMMARY

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.

INVESTMENT OVERVIEW · 03/8

Investment Process (1/2)

01 INITIAL DISCUSSION

An introductory conversation to review the strategy, structure and investor fit.

02 INDEPENDENT DUE DILIGENCE

Prospective investors review the Investment Overview, Executive Summary and supporting due diligence resources before proceeding.

03 TAG MARKETS ACCOUNT OPENING

A brokerage account is opened directly with TAG Markets, in the investor's own name.

04 KYC VERIFICATION

Standard identity verification is completed directly with TAG Markets as part of the account opening process.

INVESTMENT OVERVIEW · 04/8

Investment Process (2/2)

05 FUNDING THE BROKERAGE ACCOUNT

Once the account is opened, the investor funds it directly; capital is deposited into the investor's own account and is never transferred to or held by The Wealth Upgrade Capital.

06 CONNECTING TO THE SONIC AI STRATEGY

The funded account is connected to the Sonic AI strategy through TAG Markets' copy trading infrastructure.

07 ACTIVATING THE AMPLIFIED ALLOCATION PROGRAM (IF APPLICABLE)

Eligible accounts may optionally activate the Amplified Allocation program directly through TAG Markets, subject to the broker's eligibility requirements.

08 ONGOING MONITORING

Trading activity and performance can be independently reviewed at any time through the public Myfxbook record and MT5 View-Only access.

INVESTMENT OVERVIEW · 05/8

Independent Verification & Due Diligence Resources

01 PUBLIC MYFXBOOK RECORD

Trade-level performance data, including gains and drawdown, is published continuously on a public Myfxbook record (myfxbook.com).

02 MT5 VIEW-ONLY ACCESS

A real-time, read-only view of trading activity, provided during the due diligence process.

03 BROKER DOCUMENTATION

Client agreements, broker documentation, operational documentation and risk disclosures — including the Amplified Allocation program available to eligible accounts — are available during the due diligence process.

04 REGULATORY DOCUMENTATION

Official regulatory documentation is available for independent review during the due diligence process.

05 DUE DILIGENCE SUPPORT

Questions arising during the review of this documentation can be directed to The Wealth Upgrade Capital for clarification.

INVESTMENT OVERVIEW · 06/8

Risk & Investment Considerations

01 MARKET EXPOSURE

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

02 PAST PERFORMANCE

Past performance does not guarantee future results. Historical figures reflect a track record since November 2024 and have not been independently audited.

03 RISK MANAGEMENT

Risk oversight operates within a defined governance framework, including drawdown monitoring and account-level isolation, as set out in the Investment Memorandum.

04 INVESTOR RESPONSIBILITY

Each investor is responsible for independently assessing whether this opportunity is suitable for their individual financial circumstances, objectives and risk tolerance.

05 LONG-TERM PERSPECTIVE

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

INVESTMENT OVERVIEW · 07/8

Execution Infrastructure

01 EXECUTION INFRASTRUCTURE

The strategy is executed through brokerage infrastructure that supports copy trading.

02 INDIVIDUAL ACCOUNT OWNERSHIP

Each investor operates through an individually owned brokerage account rather than a pooled investment structure.

03 TRANSPARENCY

Performance can be independently monitored through the public Myfxbook record and MT5 View-Only access during due diligence.

04 CLIENT DOCUMENTATION

Client agreements, broker documentation, operational documentation and risk disclosures are available during due diligence.

05 SCALABILITY

The infrastructure was selected because it supports the operational requirements of the strategy.

INVESTMENT OVERVIEW · 08/8

Investor Engagement

01 SUITABILITY DISCUSSION

A confidential discussion to determine whether the opportunity is suitable for further evaluation.

02 DOCUMENT REVIEW

Prospective investors are provided the Investment Overview, Executive Summary and related documentation for review ahead of any decision.

03 QUESTIONS & CLARIFICATIONS

Any questions arising from the document review can be addressed directly with The Wealth Upgrade Capital before proceeding.

04 ACCOUNT OPENING (IF PROCEEDING)

If the investor chooses to proceed, an individual brokerage account is opened directly with TAG Markets.

05 ONGOING RELATIONSHIP

Once onboarded, investors retain independent access to performance monitoring and documentation throughout their relationship with the strategy.

Commercial terms, minimum investment requirements and applicable fees are provided upon request during the due diligence process.