



Client Logo

December 25, 2023

Monthly Insights

Meetings Scheduled:

- **Full Name**– ABC Investments – New York, New York – March 4th
- **Full Name**– XYZ Capital Management – Boca Raton, Florida – March 11th
- **Full Name**– 111 Asset Management – Tuscon, Arizona – March 11th
- **Full Name**– 123 Capital Group – Chattanooga, Tennessee – March 17th
- **Full Name**– EFG Advisors LLC – Wichita, Kansas – March 21st
- **Full Name**– LMN Capital Allocation LLC – Fort Lauderdale, Florida – March 23rd

+ all other monthly meetings.....

Qualified Leads:

Full Name, Portfolio Manager @ AAA Asset Management – Cincinnati, OH

- Does not currently hold anything in the space but has been evaluating the sector with his team.
- We discussed the key competitive advantages vs some of our peers.
- Had questions on outstanding warrants and strike prices.
- Asked for investor presentation and any supporting information.
- Next Step: Following up later next week to gauge interest.

Full Name, Partner @ CCC Capital – Georgetown, MA

- Introductory call.
- Very active in space and currently holds: Ticker 1, Ticker 2.
- Understood the value prop and how we differ from her current holdings.
- Wanted all the information, believes this could be a good for her portfolio.
- Next Step: Follow-up discussion for next Tuesday to get her thoughts upon review.

Full Name, Portfolio Manager @ NAME Investment Fund – Richmond, VA

- Called us back after our initial discussion.
- Was impressed by Management's track record.
- Looking to increase position in the sector as he believes it will be a strong back half of the year.
- Next Step: Asked for follow-up next week to schedule a meeting with our senior team.

Full Name, Chief Investment Officer @ BBB Investments – Richmond, VA

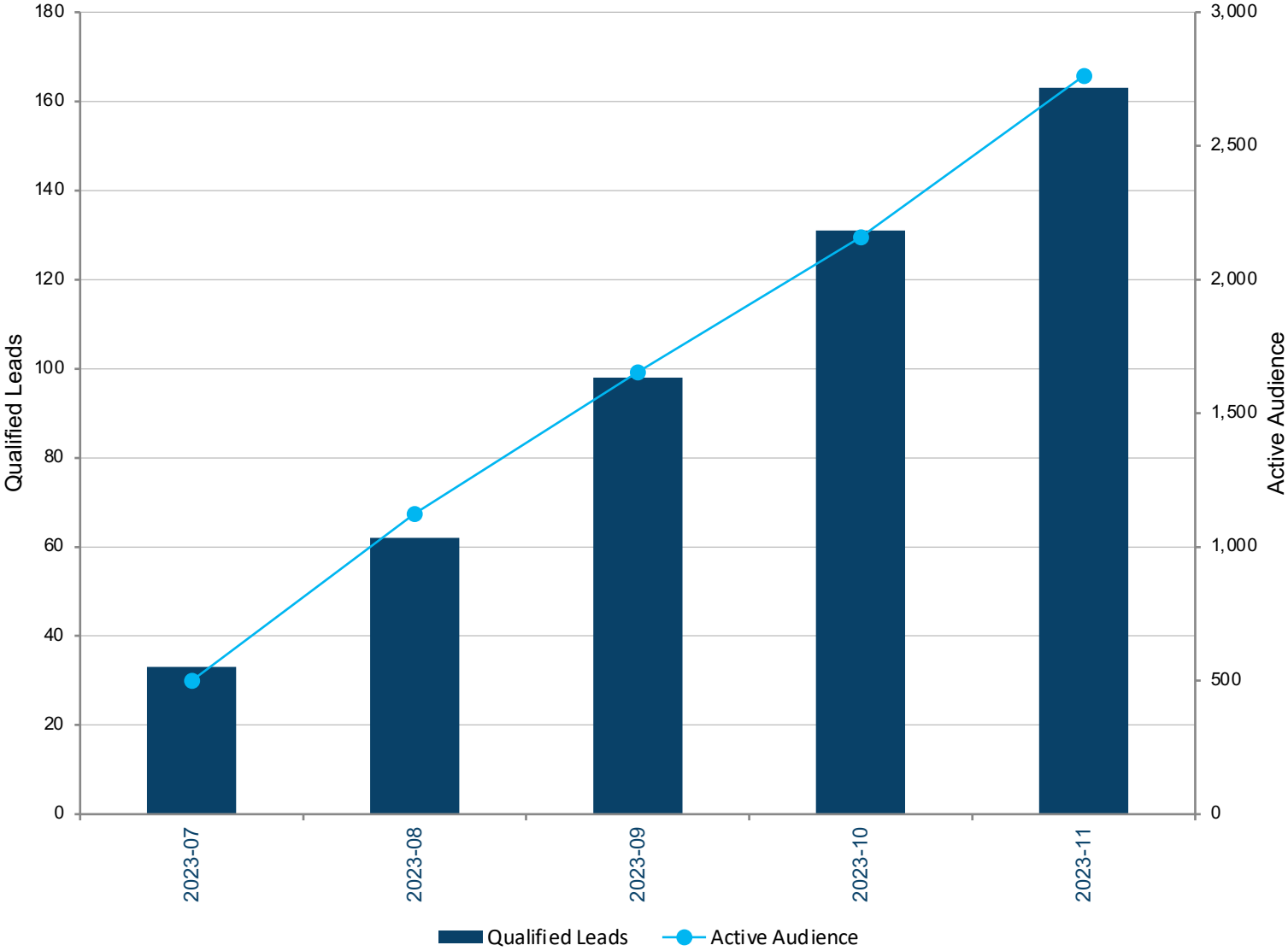
- Replied to our email asking for a comparison to Ticker 1.
- Provided key differences in business model and valuation gap.
- Thanked us for the information and said he will circle back next week with availability for a call.
- Next Step: Schedule call for Management team.

+ all other monthly qualified leads....

Call Summary

Period	Contacts	Qualified Leads	Not Interested	Active Audience
Current Month	1,542	42	30	612
Previous Campaign Total	5,373	121	68	2,150
Current Campaign Total	6,915	163	98	2,762
Monthly Growth		25.77%	44.12%	28.46%

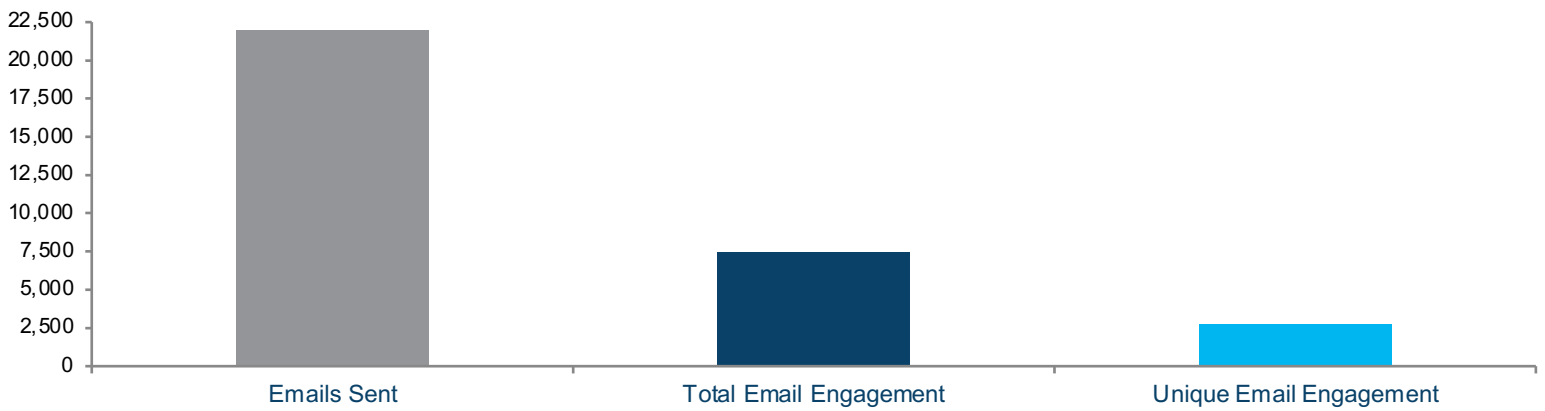
Campaign Pipeline Progression



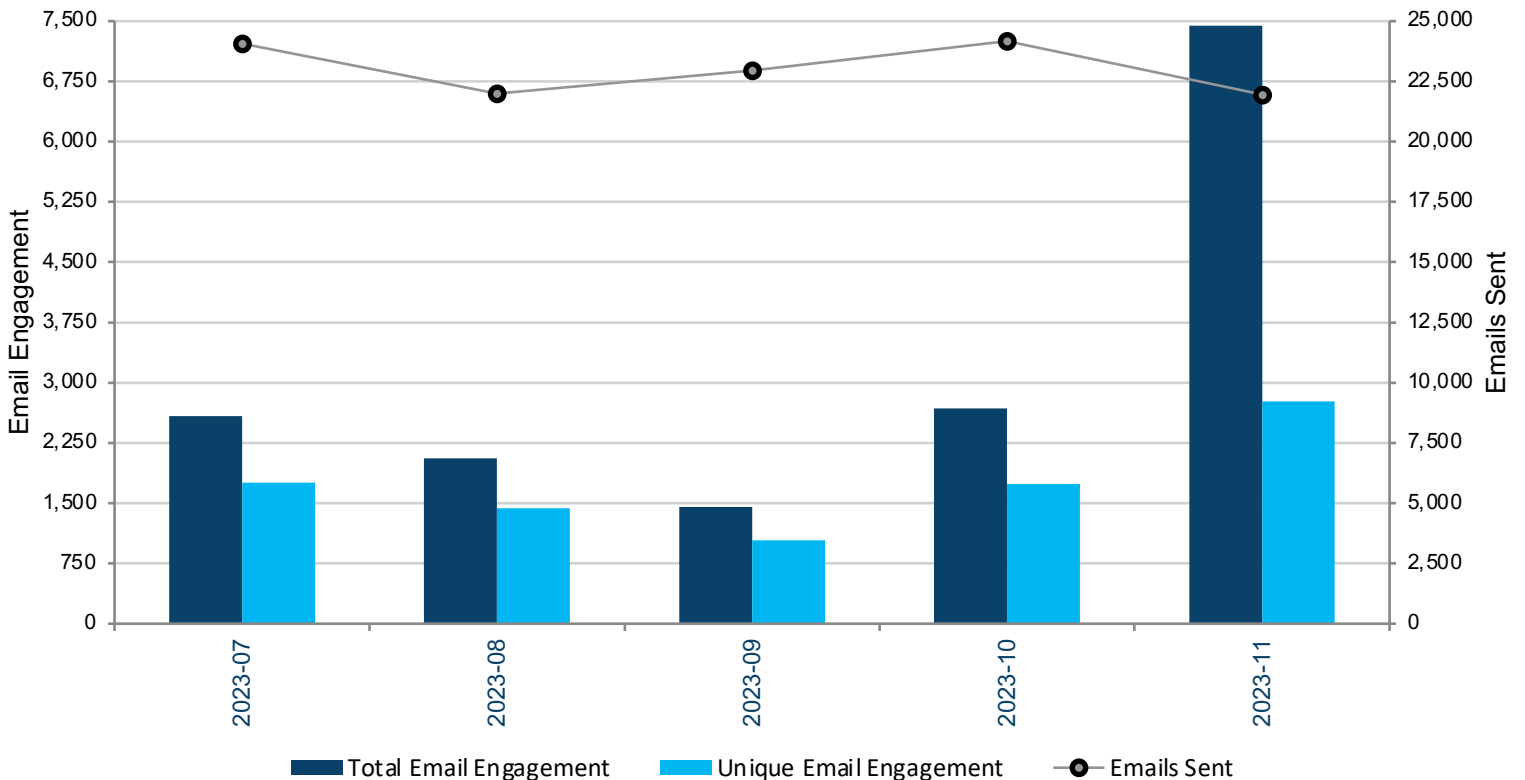
Email Summary

Period	Emails Sent	Total Email Engagement	Unique Email Engagement
Current Month	21,955	7,440	2,767
Previous Campaign Total	93,174	8,764	5,972
Current Campaign Total	115,129	16,204	8,739
Monthly Growth	23.56%	84.89%	46.33%

Monthly Email Overview



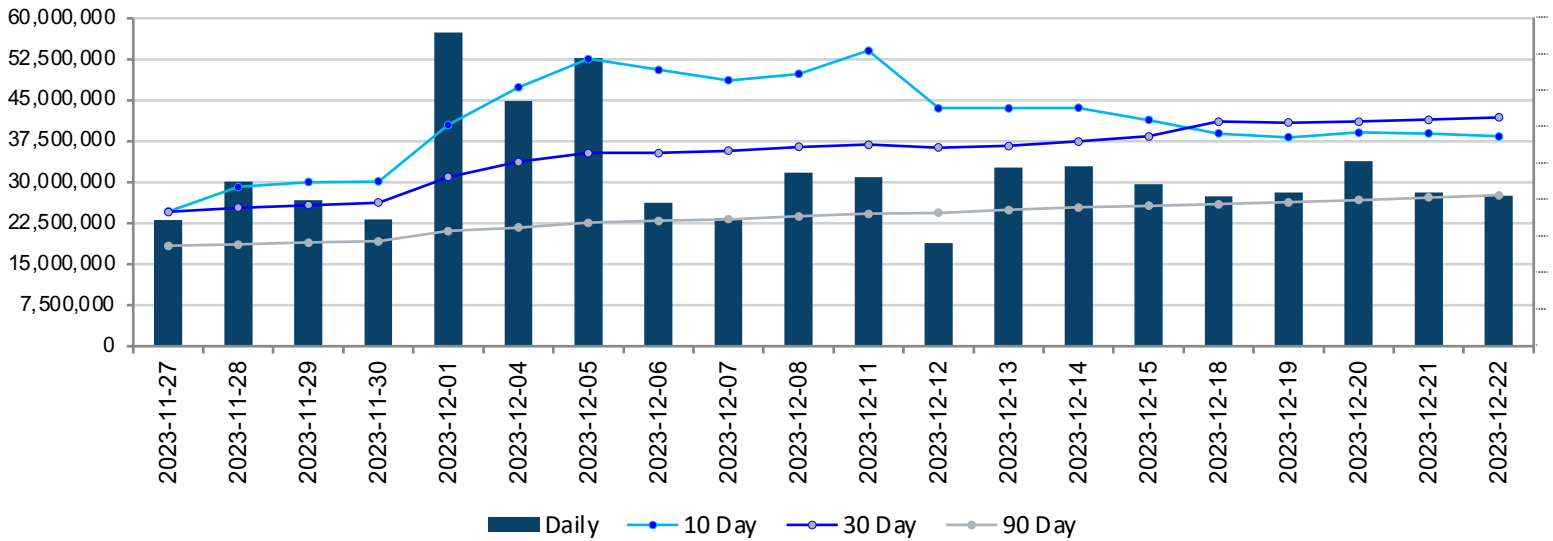
Email Campaign Engagement



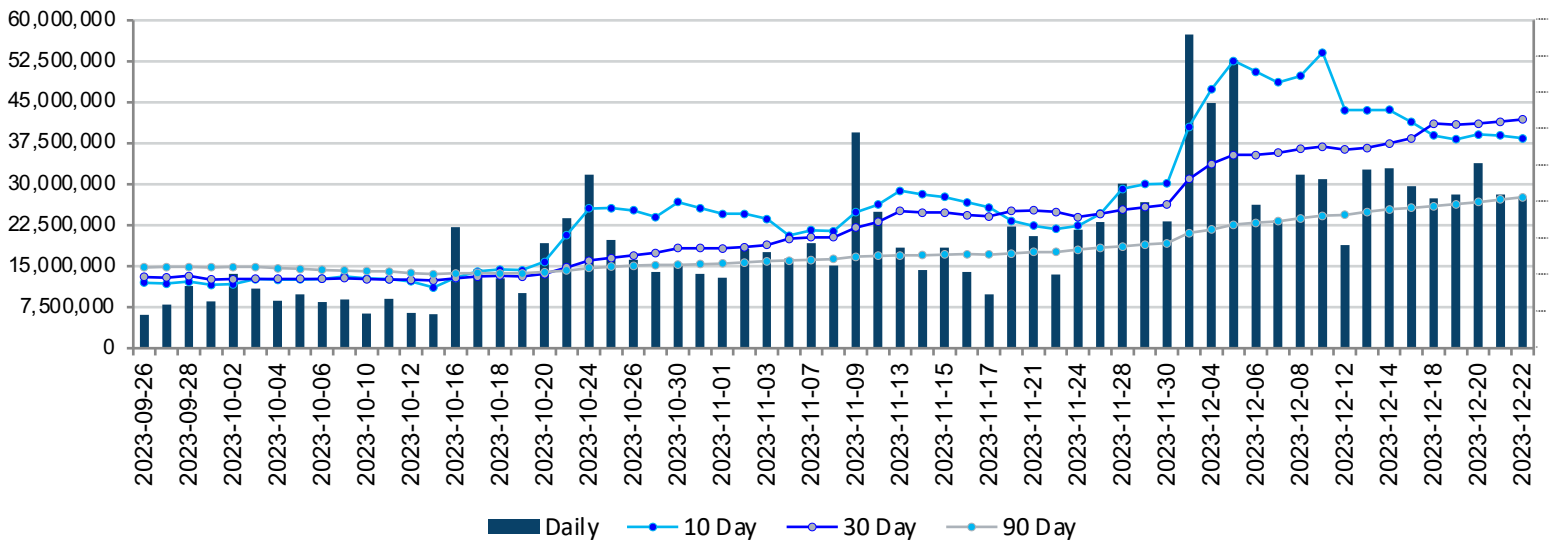
Stock Volume Summary (USA - XXXX)

Volume	10 Day	30 Day	90 Day
Start of Campaign	16,963,206	17,992,465	13,524,863
Month (Avg.)	29,124,828	31,480,205	20,355,675
Percentage Change (Campaign)	71.69%	74.96%	50.51%

Volume (Month)



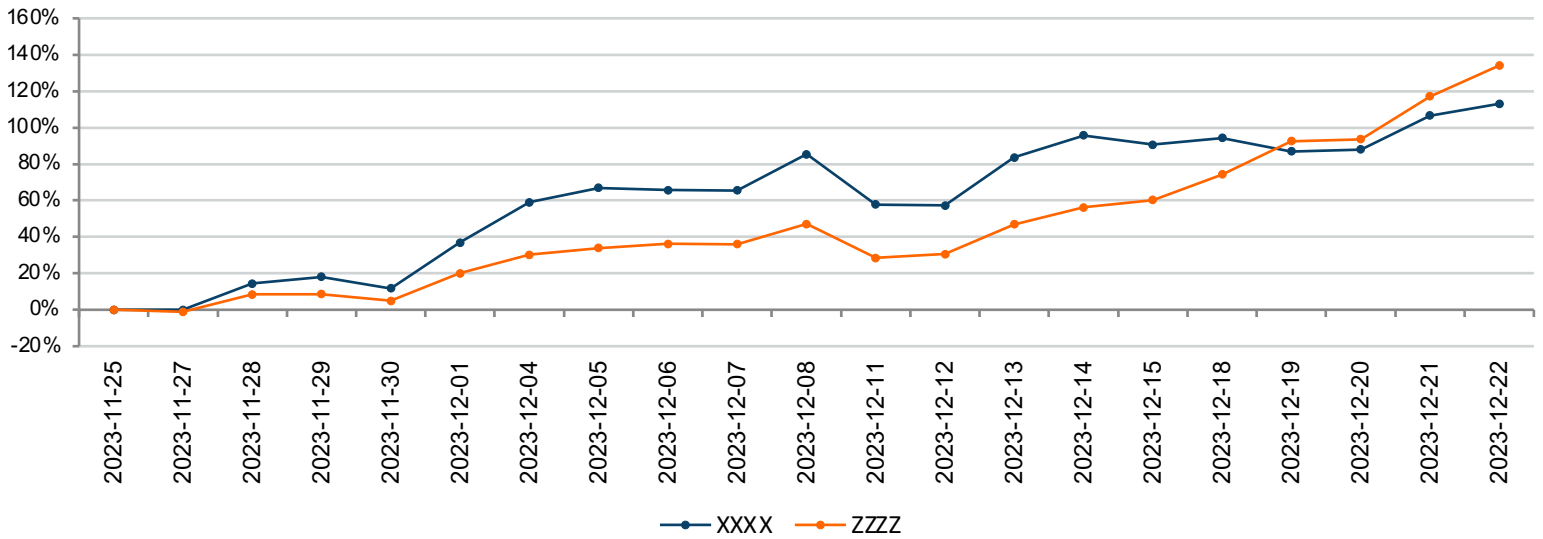
Volume (Campaign)



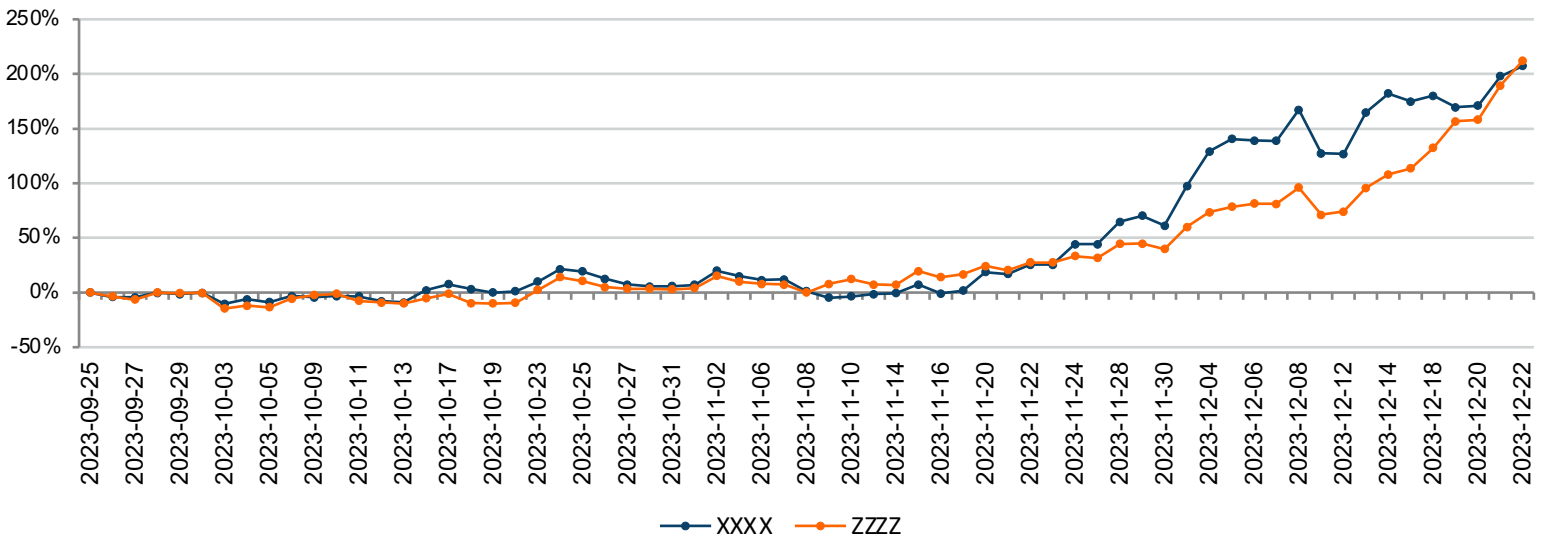
Stock Price Summary (USA)

Price	XXXX	ZZZZ
Start of Month	5.58	11.41
Current Price	11.89	26.71
Percentage Change (Campaign)	113.08%	134.09%

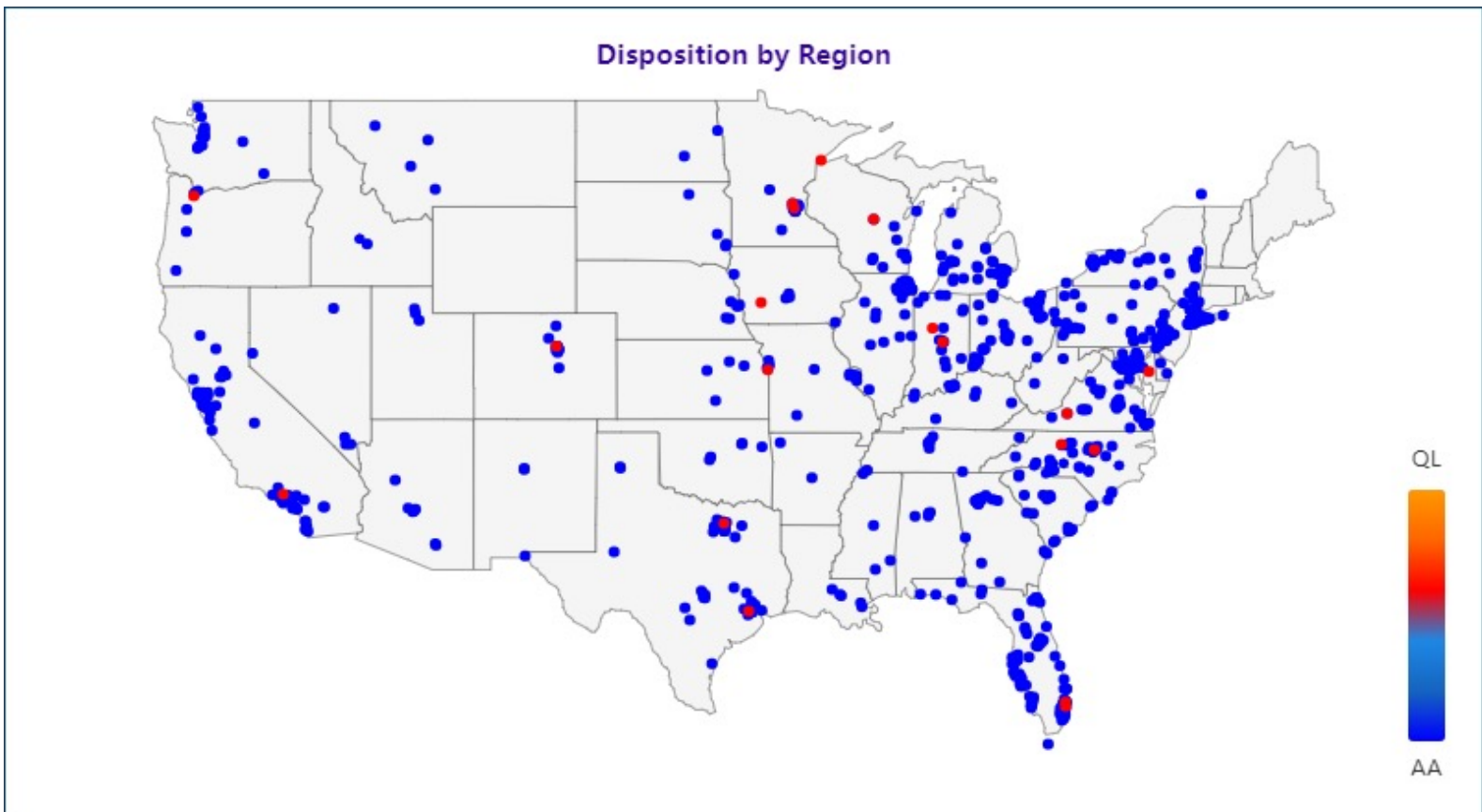
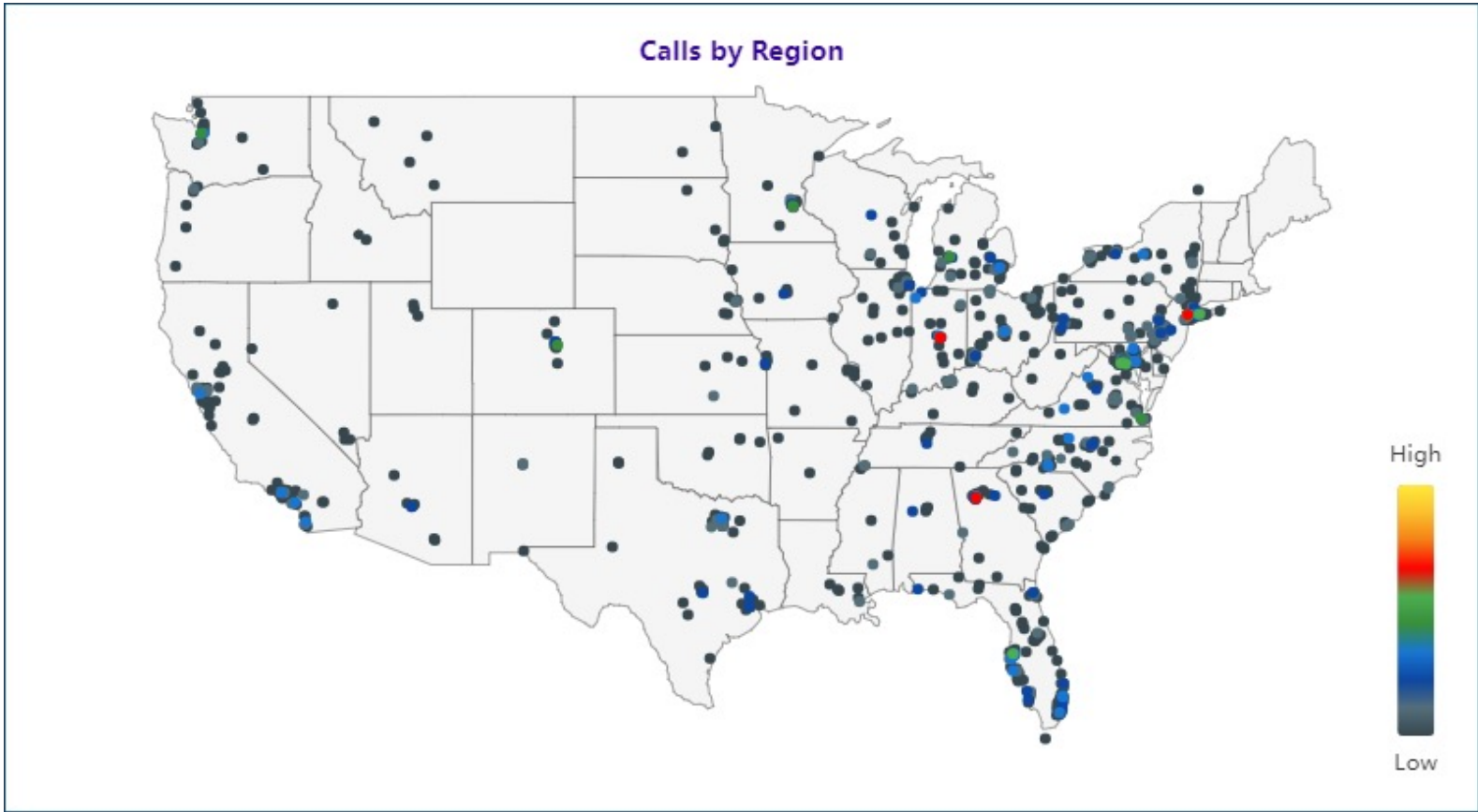
Price Performance (Month)



Price Performance (Campaign)



USA Leads Heat Map



State Summary

Location	Call Percent	Active Audience	Qualified Leads
Alabama	0.31%	42	5
Alaska	0.16%	32	-
Arizona	0.63%	59	18
Arkansas	0.16%	28	-
California	5.66%	79	1
Colorado	1.10%	62	-
Connecticut	4.64%	51	12
Delaware	0.47%	26	-
District of Columbia	0.63%	48	-
Florida	9.99%	127	25
Georgia	2.91%	33	-
Hawaii	0.24%	53	1
Idaho	0.16%	72	-
Illinois	2.36%	78	17
Indiana	2.75%	29	2
Iowa	0.63%	46	1
Kansas	0.47%	76	-
Kentucky	1.26%	49	-
Louisiana	0.47%	45	-
Maine	0.71%	39	-
Maryland	3.38%	41	10
Massachusetts	3.93%	49	8
Michigan	3.93%	68	-
Minnesota	2.05%	78	3
Mississippi	0.39%	69	-
Missouri	0.79%	29	11
Montana	0.31%	45	-
Nebraska	0.63%	37	-
Nevada	0.31%	41	5
New Hampshire	0.94%	68	-
New Jersey	4.64%	52	2
New Mexico	0.08%	47	-

State Summary

Location	Call Percent	Active Audience	Qualified Leads
New York	11.80%	141	-
North Carolina	4.25%	61	2
North Dakota	0.08%	78	-
Ohio	3.93%	51	7
Oklahoma	0.47%	60	-
Oregon	0.24%	59	8
Pennsylvania	5.66%	69	-
Rhode Island	0.94%	48	8
South Carolina	1.57%	61	-
South Dakota	0.31%	49	-
Tennessee	0.94%	57	-
Texas	4.17%	65	2
Utah	0.24%	38	-
Vermont	0.31%	43	-
Virginia	4.72%	57	14
Washington	2.05%	26	-
West Virginia	0.24%	53	-
Wisconsin	0.94%	48	1
State Total	100%	2,762	163

Qualified Leads

Firm	Full Name	Phone	Email
Contact's Firm	Doe, John	(555) 123-4567	jdoe@company.com
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