

# The Socrates Platform

Introduction

# The Socrates Platform

- A unique **Software-as-a-Service platform** designed to help research global market behavior across approximately **~1,000 financial instruments around the world** – top Indices, Stocks, Bonds, ETF's, Commodities, and Currencies – referred to as "Covered Markets"
- The Socrates Platform is built on proprietary computer models that apply **technical and cyclical analysis methodologies**
- The proprietary computer models provide **system-generated** pattern recognition (**Global Market Watch**), price pressure points (**Reversals\***), and timing considerations (**Arrays\***) across all Covered Markets, and every available time level
- The platform is designed to provide access to **unbiased, unemotional, data-driven analysis of global markets** without predisposition of personal opinion

The screenshot displays the Socrates Business Platform interface, which is divided into several sections:

- Members Homepage Grid View:** A top navigation bar with options like 'Watchlist - Top 10', 'Market Movers', and 'Global Capital Flows Heat Map'.
- Watchlist - Top 10:** A table listing various market indices and their performance metrics (Open, High, Low, Close, and 60-day Monthly Trend).
- Market Movers:** A section for identifying key market movements, including 'Top Movers' and 'Bottom Movers'.
- Global Capital Flows Heat Map:** A world map showing capital flow trends across different regions.
- Global Market Watch Comments:** A section for tracking market sentiment and trends over different time periods (Daily, Weekly, Monthly, Quarterly, Yearly).
- Daily Price Chart:** A line chart showing price movement over time, with a table of key price points (Open, High, Low, Close, Change, 50 MA, 200 MA).
- Global Market Watch:** A dashboard providing a comprehensive overview of market conditions, including 'Price Movement', 'Price Date', 'Moving Averages', 'Stochastic', 'Indicating Ranges', and 'Reversals'.
- Economic Confidence Model:** A detailed analysis of economic confidence, including a table of 'Last Elected Reversal' and 'Next Reversal Point'.
- Stochastics:** A chart showing stochastic indicators for market analysis.
- Daily Energy Model:** A chart showing energy market trends and indicators.

At the bottom of the interface, there is a section titled 'SOCRATES BUSINESS PLATFORM - LICENSED MARKET OVERVIEW TEXT' which provides additional context and data for the platform's analysis.

2020 Global - S&P 500 closed above our indicating ranges on the last year's settlement of 259186. The last Reversal elected in excess from the last strategic low established 04/21/2020. If possible, from a speculative perspective, basis the Reversal level remains above our projected resistance standing at 157813 that number at this moment. A break of that level into array may most likely warn of at least a pause in the uptrend. The next leg another long position. There is gap above the market

# Covering Financial Instruments Across the Globe

We call them “Covered Markets”

- The **Socrates Platform** allows members to research key financial instruments around the world – including top Indices, Stocks, Bonds, ETF’s, Commodities, and Currencies
- Emphasis on financial instruments listed on major exchanges with enough history to generate insights from our proprietary technical and cyclical models (the more data fed into our systems, the more intelligent they become).
- Some instruments will be added earlier in their lifespan than others based on significance of trading volume, geographic and/or sector representation, provided they have enough data for the models.
- Socrates generally does not cover Initial Public Offerings (IPO’s) or Initial Coin Offerings (ICO’s) at inception, nor does it cover options or penny stocks.

*Disclaimer: Like any company reliant on third-party providers, cloud-based technology systems, and large amounts of data from numerous sources, there may be unplanned delays or errors. While we do our best to avoid such occurrences, no technology service can guarantee this will never happen.*

# Proprietary Computer Models

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Built over decades, based on historical data

# Proprietary Models at Your Fingertips

## Economic Confidence Model

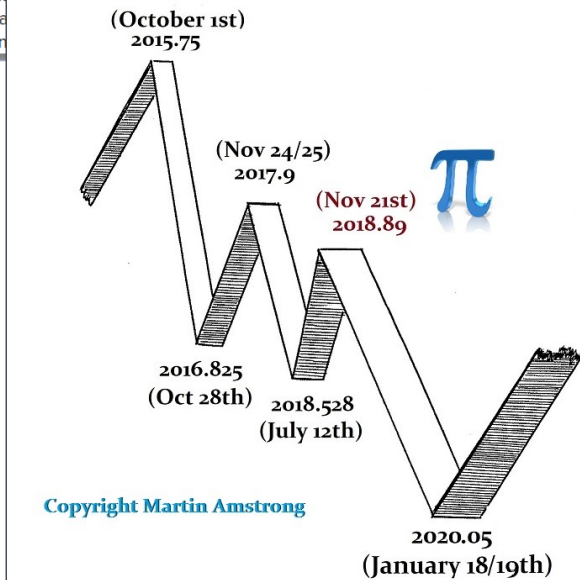
- Sometimes referred to as the Pi Cycle, the ECM **analyzes the global economy and business cycle by tracking capital concentration.**
- A **long-term view of possible shifts in confidence in the future** that could lead to notable economic events, as demonstrated over the course of history - it's not a forecast for individual instruments.
- The model is a build up of cycle waves from shorter to longer (e.g. 8.6yrs, 51.6yrs, 309.6yrs) – the longer the cycle wave, the greater the magnitude of a shift in confidence.
- ECM turning points or target dates have aligned with the start of global market change (up or down) – such as the **shift in January 2020.**

### Economic Confidence Model

From an economic viewpoint, the global economy the next major turning point will arrive Sat. Jan. 18, 2020 on a worldwide scale coinciding with our Monetary Crisis Cycle going

into 2021. At this moment Sat. Jan. 18, 2020 which is disturbed being the U on the ECM thereafter inflationary one due to demand expansion caused in this inflationary trend

### Economic Confidence Model Wave 934 (2011.45-2020.05)



# Proprietary Models at Your Fingertips

## Global Market Watch

- **Pattern-recognition** computer model **analyzing each covered market** in the Socrates Business Platform **independently** to identify if any historical patterns are repeating themselves, or if any new patterns may be forming.
- Consider this a cyclical cheat sheet, with easy-to-read **color and comment scheme**.
- **Blue** and **Yellow** colors in particular identify patterns pointing to possible sharp moves or turning points
- Can help identify new possible opportunities that warrant further research.
- Or can be used as an additional point of confirmation for research that has already been conducted.

Market	Close (as of 06/01/2020)	Change (vs prior close)	GMW Daily Pattern	GMW Weekly Pattern	GMW Monthly Pattern	GMW Quarterly Pattern	GMW Yearly Pattern
Argentina - Merval Buenos Aires Index (*MERV)	40,016.98	5.80% (2,192.25)	Turning Back UP	Holding For Now	Moving Higher	Low in Place Consolidating	Knee Jerk Low
Asia - S&P Asia 50 \$ Index	4,651.19	2.90% (130.93)	Temp High	Forming High	New Pattern Forming	Turning UP	New Pattern Forming
Australia - All Ordinaries Index (*AORD)	5,938.40	1.13% (66.20)	New Pattern Forming	New Pattern Forming	New Pattern Forming	Turning Back UP	New Pattern Forming
Australia - FTSE All-Share Index (*DJAU)	3,952.80	1.21% (47.20)	Reaction Low	New Pattern Forming	New Pattern Forming	Turning Back UP	New Pattern Forming
Australia - S&P / ASX 200 Index (*AXJO)	67,489.00	-0.01% (-8.00)	New Pattern Forming	New Pattern Forming	New Pattern Forming	Moving Higher	Turning Back UP
Australia - S&P / ASX 300 Index	5,788.82	1.08% (61.57)	New Pattern Forming	Still Pressing Higher	New Pattern Forming	Turning Back UP	Still STRONG
Australia - S&P / ASX 50 Index	5,686.90	1.22% (68.80)	Reaction Low	Still Breaking-Out	New Pattern Forming	Turning Back UP	SPIKE HIGH
Australia - S&P/ASX 200 Index (*AXJO)	58,192.00	1.10% (635.00)	New Pattern Forming	New Pattern Forming	New Pattern Forming	Turning Back UP	New Pattern Forming
Australia - SPI 200 Futures	5,828.00	1.37% (79.00)	New Pattern Forming	New Pattern Forming	New Pattern Forming	Turning Back UP	Knee Jerk Low
Austria - Austrian Traded Index (*ATX)	2,232.30	-1.62% (-36.83)	Temp High In Place	Turning Back UP	Further Decline Still Possible	Knee Jerk High Close	Approaching Important Low
Belgium - BEL20 Index (*BFX)	3,268.03	2.03% (65.08)	Turning Back UP	Turning BACK DOWN Crash Possible	Turning Back UP	New Pattern Forming	Preparing to Breakout

# Proprietary Models at Your Fingertips

## Indicating Ranges

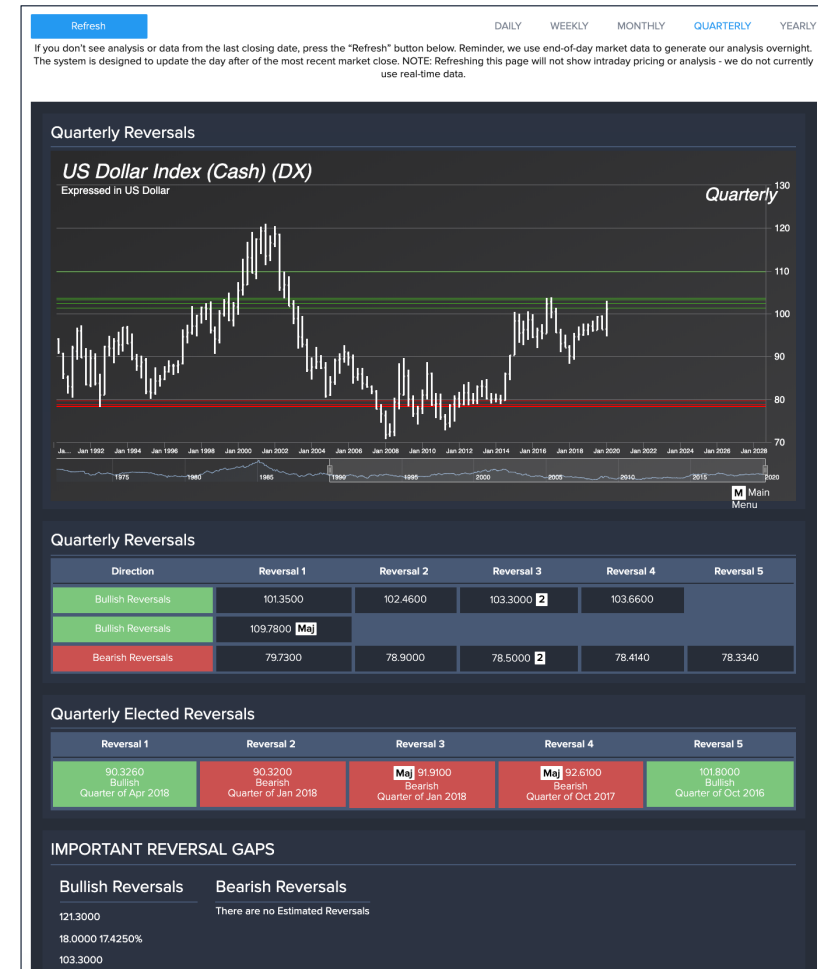
- Complement your study with a unique set of indicators designed to assess strength/weakness in both technical and cyclical market conditions based on proprietary computer model analysis
- Simple **Bearish**, Neutral or **Bullish** rating analyzed nightly for each Covered Market, on every time level (Daily/Weekly/Monthly/Quarterly/Yearly)
- Used as an additional point of confirmation for research that has already been conducted

Indicating Ranges ( - )					
Energy	Bullish	Bullish	Bearish	Bullish	Bearish
Momentum	Bullish	Bullish	Bearish	Bearish	Neutral
Trend	Bullish	Neutral	Bearish	Bearish	Bearish
Long-Term	Bullish	Bearish	Bearish	Bearish	Bearish
Cyclical Strength	Bullish	Bearish	Bearish	Bearish	Neutral
Center Point	Bullish	Bullish	Bullish	Bearish	Bearish
Consecutive Closes	No Change	No Change	No Change	Down 1 Quarter	No Change

# Proprietary Models at Your Fingertips

## Reversal System\*

- **Analyzes price activity and energy** looking for **pressure points** (Reversal points) in a given price range.
  - Reversal points are “generated” (established) upon market highs (Bearish Reversals) and lows (Bullish Reversals).
  - Reversal points are “elected” (activated) only when crossed on a closing basis.
  - As pressure in price movement builds up in one direction or another, corresponding **Reversal points represent possible areas of support or resistance**.
- **Best used with Arrays\*** to identify possible **convergence of time and price considerations** you are researching.
- *Reversals\* only available via Premium Market Subscription; includes Daily, Weekly, Monthly*
- *Quarterly & Yearly Arrays are exclusive to Socrates Business*

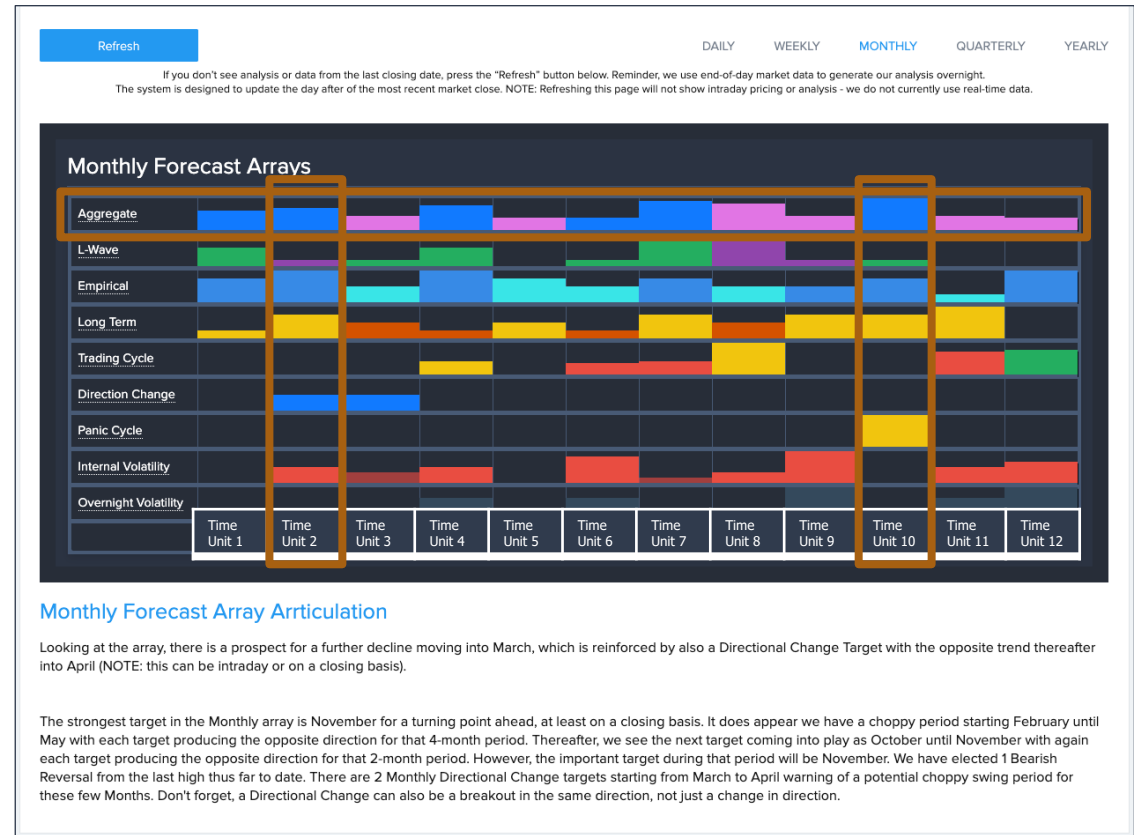




# Proprietary Models at Your Fingertips

## Timing Arrays\*

- Collection of **computer models** assessing possible timing of **cyclical peaks** that **could result in market turning points** (up or down), changes in trend and/or volatility.
- Each row = a different model
- Each column = a unit of time (day, week, etc)
- **Aggregate row is a summation of cycle activity** – a key indicator of potential turning points ahead (up or down), especially when activity aligns with Trading Cycle, Direction Change, Panic Cycle and/or Volatility.
- **Best used with Reversals\*** to identify possible **convergence of time and price considerations** you are researching.
- *Arrays\* only available via Premium Market Subscription; includes Daily, Weekly, Monthly*
- *Quarterly & Yearly Arrays are exclusive to Socrates Business*



# Unbiased Computer-Generated Market Analysis text

The Socrates Platform utilizes natural language processing to deliver **computer-generated analysis text**\* for each covered market – **free from human bias, predisposition or emotion.**

- Intended to help users interpret the output from the proprietary computer models within the Socrates Platform but is **not a substitute for your own research and understanding.**
- Licensed Market analysis text includes key Reversal points, Array cycles, along with other computer model analysis output, risk considerations and technical studies to help paint a broader and/or deeper picture of market activity.
- Users are encouraged to focus primarily on the Reversals and Arrays directly - read the analysis text, but study the core models (ECM, GMW, Reversals, Arrays) and learn how to interpret them yourself as this is ultimately the best way to conduct your own analysis.



# Market Subscriptions or Snapshot Reports – Your Call

The **SOCRATES Platform** offers two ways to access additional information and model output for any market a user wants to research further – giving ultimate flexibility

**Market Subscription:** a recurring monthly fee for continuous access to our most up-to-date analysis of a Covered Market

- **Summary Market Subscription** (available to all members)
- **Detailed Market Subscription** (available to Plus and Pro members)
- **Premium Market Subscription** (available to Pro members)

**Snapshot Report:** a one-time purchased report of our analysis from a specific date on a specific Covered Market, and saved to your account for future reference

- **Summary Snapshot Report** (available to all members)
- **Detailed Snapshot Report** (available to Plus and Pro members)
- **Premium Snapshot Report** (available to Pro members)

**My Market Subscriptions**

Market	Close	Change (vs prior close)	GMW Daily Trend	GMW Weekly Trend	GMW Monthly Trend	GMW Quarterly Trend	GMW Yearly Trend	Current Subscription
<b>GLOBAL STOCKS</b>								
★ US-	1,698.75	9.63 (0.57%)	Moving Higher	Still BULLISH	High Close	REACHING Important High	Breakout	Premium Analysis
★ US-	1,139.32	9.33 (0.83%)	BULLISH For Now	New Pattern Forming	New Pattern Forming	Warning High Closing		Premium Analysis
★ US-	146.87	0.29 (0.20%)	New Pattern Forming	Pushing To Upside	Turning Back UP	Bearish	New Pattern Forming	Detailed Analysis
★ US-	101.31	0.26 (0.26%)	Still Risk of Decline	Turning BACK DOWN	New Pattern Forming	REACHING Important High	Moving Higher	Premium Analysis
★ US-	104.33	-0.02 (-0.02%)	New Pattern Forming	Losing Momentum	Turning Back UP	New Lows Possible	Turning BACK DOWN	Summary Analysis
<b>ETFs</b>								
★ PowerShares	175.83	0.92 (0.53%)	New Pattern Forming	Pressing Higher	In Breakout Mode to UPSIDE	REACHING Important High	Breakout	Premium Analysis
★ SPDR I	253.30	-0.09 (-0.04%)	Still Above Support	Temp High	New Pattern Forming	WARNING Turning Back UP	Temp High	Premium Analysis
★ SPDR I	278.92	0.36 (0.13%)	New Pattern Forming CHOPPY	Pushing Higher	Moving Higher	New Pattern Forming	BULLISH For Now	Premium Analysis
☆ Vanguard	128.49	0.14 (0.11%)	Possible High Close	Pushing Higher	Moving Higher	Stable		Detailed Analysis
☆ Vanguard	128.95	0.04 (0.03%)	Reaction Low	Pushing Higher	Moving Higher	Stable		Summary Analysis

**My Snapshot reports**

Snapshot Report	Analysis Date	Analysis Type
Australia BMK 10 Yr YLD (AUD)	06/12/2018	Detailed
iShares 20+ Year Treasury Bond	06/12/2018	Detailed
New York Spot Copper	06/12/2018	Detailed
US-3M	06/12/2018	Detailed
SPDR Gold Shares	10/23/2017	Detailed

*Notes: Snapshot Reports can only be added to your account by using our exclusive Market Access Credits (MACs); graphics and screen shots are for illustrative purposes at time of this document creation but may differ from the live service. The Business version of the Socrates Platform offers Licensed Markets (like a Premium Market Subscription but adds Quarterly & Yearly Reversals and Arrays) as well as Business Snapshot Reports.*

# Choose the Right Access for You

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Standard Platform: Basic, Plus, Pro monthly membership plans

Business version offers annual licensed plans for advanced users

Basic Membership	Plus Membership	Pro Membership
<p>\$15.00 per month</p> <p>This is our entry-level membership package, designed for passive investors looking to conduct market research by accessing our unique perspective on global market trends. Basic Members can research markets via our Global Market Watch (pattern recognition model for price movement), and our Summary Analysis text (high-level market behavior commentary, generated from sophisticated artificial intelligence engine).</p> <p><b>Basic Membership includes:</b></p> <ul style="list-style-type: none"> <li>• Customizable Watchlist</li> <li>• Over 1,000 Covered Markets to research</li> <li>• Global Market Watch on all Covered Markets (Monthly, Quarterly, Yearly)</li> <li>• Indicating Ranges on all Covered Markets (Weekly, Monthly, Quarterly)</li> <li>• 25 bundled Summary Market Subscriptions</li> <li>• Ability to purchase Summary Analysis on any other Covered Market (via recurring Market Subscriptions or one-time Snapshot Reports)</li> </ul>	<p>\$55.00 per month</p> <p>Designed for active investors looking to expand their market research beyond the information provided in our entry-level membership package. Plus Members have access to our expanded Global Market Watch (adds Weekly pattern recognition) as well as two different market analysis text options - Summary Analysis, and Detailed Analysis (not available to Basic Members).</p> <p><b>Plus Membership includes:</b></p> <ul style="list-style-type: none"> <li>• Customizable Watchlist (up to 5 different lists!)</li> <li>• Over 1,000 Covered Markets to research</li> <li>• Global Market Watch on all Covered Markets (Weekly, Monthly, Quarterly, Yearly)</li> <li>• Indicating Ranges on all Covered Markets (Weekly, Monthly, Quarterly)</li> <li>• 50 bundled Summary Market Subscriptions</li> <li>• 5 bundled Detailed Market Subscriptions</li> <li>• 1 member-selected Detailed Market Subscription (You pick!)</li> <li>• Ability to purchase Summary Analysis or Detailed Analysis on any other Covered Market (via recurring Market Subscriptions or one-time Snapshot Reports)</li> </ul>	<p>\$150.00 per month</p> <p>Designed for active investors and traders looking to supplement their market research with our most comprehensive set of analysis and tools. Pro Members have access to our full Global Market Watch (adds Daily pattern recognition) as well as three different market analysis text options - Summary Analysis, Detailed Analysis, and Premium Analysis (not available to Basic or Plus Members).</p> <p><b>Pro Membership includes:</b></p> <ul style="list-style-type: none"> <li>• Customizable Watchlist (up to 5 different lists!)</li> <li>• Over 1,000 Covered Markets to research</li> <li>• Global Market Watch on all Covered Markets (Daily, Weekly, Monthly, Quarterly, Yearly)</li> <li>• Indicating Ranges on all Covered Markets (Daily, Weekly, Monthly, Quarterly, Yearly)</li> <li>• 100 bundled Summary Market Subscriptions</li> <li>• 15 bundled Detailed Market Subscriptions</li> <li>• 1 member-selected Detailed Market Subscription (You pick!)</li> <li>• 1 member-selected Premium Market Subscription (You pick!)</li> <li>• Full flexibility to purchase Summary, Detailed, or Premium Analysis on any other Covered Market (via recurring Market Subscriptions or one-time Snapshot Reports)</li> </ul> <p><b>Premium Market Subscriptions include</b> the following premium tools:</p> <ul style="list-style-type: none"> <li>• Arrays (time-based model; Daily, Weekly, Monthly)</li> <li>• Reversals points and chart (price-based model; Daily, Weekly, Monthly)</li> <li>• Customizable Grid View (quickly compare multiple premium market subscriptions across key data points)</li> <li>• Premium Analysis text (most comprehensive computer-generated text)</li> <li>• And more!</li> </ul>

*Notes:*  
 All pricing and description of Socrates Platform membership and licensed business users is subject to change.  
 The Business version of the Socrates Platform is made available via an annual license and includes Quarterly & Yearly Reversals and Arrays for licensed markets.

# The Socrates Business Platform

- Designed as an upgrade from the standard Pro membership (*Pro membership strongly encouraged before considering Business version*)
- Available via annual license and set up for either an individual or multi-user accounts
- Below are some key enhancements over the standard version of Socrates:
  - **In addition to the full GMW and Indicating Ranges, licensed users receive Summary Analysis text on all Covered Markets**
  - **Licensed markets include Quarterly and Yearly Reversals and Arrays** ([Quarterly & Yearly – exclusive to Business Platform](#))\*
  - **“Market Finder” feature** – exclusive tool to query the entire list of Covered Markets to find markets showing the key model results you’re looking to research further
  - Socrates Business Platform **customer service tickets managed separately** from Standard Socrates Platform customer service tickets
- **Licensing access to the Socrates Business Platform is simple:**
  1. Pick the number of users on your account;
  2. Pick the number of Covered Markets to be included in your license;
  3. Agree on a term length and payment terms;
  4. Sign agreement – you’ll get set up for access by, and away you go.

*Notes:*  
All pricing and description of Socrates Platform membership and licensed business users is subject to change.  
Socrates Business Platform version requires a minimum of 12 months commitment; the annual license starts at \$15,600 for 1 user with 25 markets.

# Thank You

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