



NAVEXA LIVE • WEEKLY WEBINAR

Navexa Live with Tom & James

What's new in Navexa, and your questions answered.

WHEN

Wednesday 28 October 2026
1:00 pm AEDT

PRESENTERS

Tom Wilson
James Tattersfield

TODAY

- 01 What's new in Navexa
- 02 Roi and Scenarios
- 03 Connecting Navexa to AI tools
- 04 Your questions

Before we begin



General information only

Nothing today is financial or tax advice.



Hypothetical data

Our demo portfolios use fictional transactions.



Not recommendations

Investments shown are examples only.



Your situation is unique. Speak to a licensed adviser or tax professional.

How Navexa Live works

HOW OFTEN

Weekly

Every Wednesday

WHEN

1 pm

AEDT, Melbourne time

HOW LONG

40 min

Around 40 minutes

TWO WAYS TO ASK



When you register. Send your question in advance.



Live in the chat. Ask at any time today.

Getting started with Navexa



Help Centre

Step-by-step guides for setting up, importing and reporting.

help.navexa.com



Ask Roi

Ask about your portfolio or how to use Navexa.

In the navigation rail



YouTube walkthroughs

Short videos that show you each task in Navexa.

youtube.com/@navexa-support



Tip: on a portfolio page, use the Ask Roi button at the bottom right.

What's new in Navexa

01

Roi

Your AI assistant, built into the Navexa web platform.

[Ask Roi](#) • [navigation rail](#)

02

Scenarios

Model hypothetical trades before you decide.

[Tax Reporting](#) > [Tax Planning](#)

03

Changelog

New features, improvements and fixes as they ship.

feedback.navexa.io/changelog



Scenarios is on every plan during testing, for supported AUD portfolios.

Roi and Scenarios

Roi

TRY ASKING

"Which holdings contributed most to my return last year?"

COMMON QUESTION

"Can I still reach a person?" Yes, if your plan includes human support.

Scenarios

TRY IT

Model a sale, then compare two or three scenarios side by side.

COMMON QUESTION

"Does it change my portfolio?" No. It doesn't record trades or place orders.

Problems Roi fixed this week

✓ **FIXED**

Trades missing after moving brokers

Checked line by line, and the missing trades added.

✓ **FIXED**

Broker CSV files to import

Uploaded into the chat, and Roi imported them.

✓ **FIXED**

Income in the wrong financial year

A July distribution found in the wrong year, and fixed.

✓ **FIXED**

A negative share count

Traced to a dividend reinvestment, and resolved.

✓ **EXPLAINED**

A tax report that didn't make sense

Walked through step by step, label by label.

💬 **SAME PROBLEM?**

Ask Roi in your own words

Ask Roi, at the top of the navigation rail.

Connecting Navexa to AI tools

MCP lets an AI assistant read approved Navexa data and use approved tools.



Dealer receipts in. Monthly prices, a schedule and an ASX 200 benchmark out.

▶ RECORDED WALKTHROUGH

AI TOOLS · GOLD AND PRECIOUS METALS

James's walkthrough



NAVEXA LIVE · AI TOOLS DEMO

Your physical gold, tracked by Claude.

Receipts in. Monthly prices, a schedule and a benchmark out.

• FICTIONAL DEMO TRANSACTIONS

PRESENTED BY

James

LENGTH

0:42

TRY IT YOURSELF

Connect Navexa to Claude or ChatGPT.
help.navexa.com

Questions?

The ones you sent in, and the ones you ask today.



Sent when registering

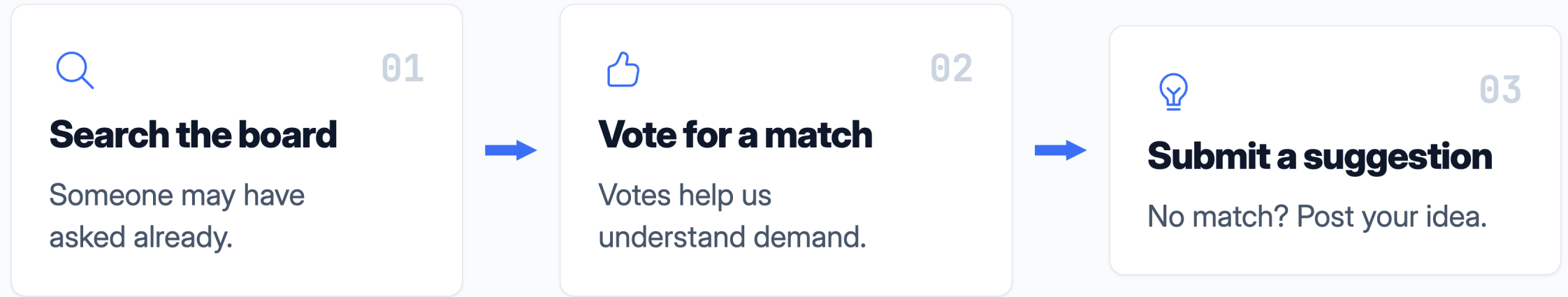


Ask now in the chat



The rest on the blog

Have an idea for Navexa?



 feedback.navexa.io or select **Feedback** in the Navexa menu

 **Posts are public.** Leave out account details and portfolio data.

AFTER THE SESSION

Replay, slides and follow-up answers



The recording

Watch the full session again.



These slides

Every link from today in one place.



Follow-up answers

Questions we couldn't cover live.



ALL THREE ON THE BLOG

navexa.com/blog



RECORDING ALSO ON YOUTUBE

[@navexa-support](https://www.youtube.com/@navexa-support)

NEXT NAVEXA LIVE

See you next Wednesday

4 November · 1 pm AEDT

Submit your questions when you register.



Help Centre

help.navexa.com



Ask Roi

In Navexa



YouTube

[@navexa-support](https://www.youtube.com/@navexa-support)



Blog

navexa.com/blog