Navexa

NAVEXA LIVE · WEEKLY WEBINAR

Navexa Live with Tom & James

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

WHEN

Wednesday 4 November 2026
2:00 pm AEDT

PRESENTERS

Tom Wilson
James Tattersfield

TODAY

01 How people use Roi

02 Make Roi work your way

03 ETF X-ray and Navexa in Claude

04 Your questions

FICTIONAL DEMO DATA

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.

NAVEXA LIVE · THE FORMAT

How Navexa Live works

HOW OFTEN

Weekly

Every Wednesday

WHEN

2 pm

AEDT, Melbourne time

HOW LONG

40 min

Around 40 minutes

TWO WAYS TO ASK

When you register. Send your question in advance.

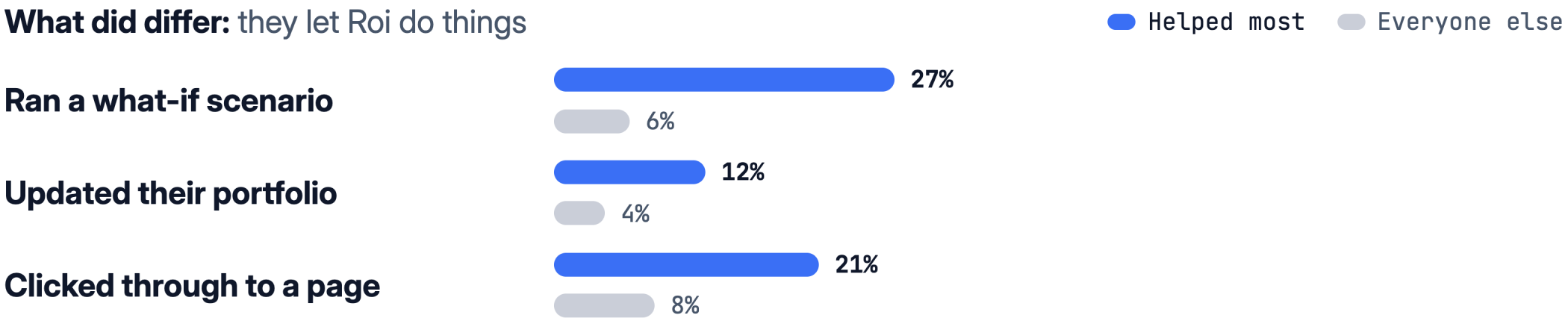
Live in the chat. Ask at any time today.

You don’t need to be good at AI

DIDN’T MATTER — **Longer prompts.** 2.59 vs 2.33 messages a chat

DIDN’T MATTER — **Typing vs tapping.** Quick prompts worked as well

What did differ: they let Roi do things



Helped most = Roi resolved one of their chats and they came back on two or more days (about 36% of Roi users). A pattern, not proof Roi caused it.

ROI · TIPS

Three habits worth stealing

01

Ask for the what-if

“What if I sold half my BHP before 30 June?”

Roi runs a scenario

02

Let it do the update

“Record a $412 CBA dividend paid today.”

You confirm before it saves

03

Take the link

“Where do I check my unconfirmed dividends?”

Roi takes you to the page

New to Roi? Tap Health check first. It’s the most-used quick prompt.

▷ LIVE IN NAVEXA SETTINGS › AI FEATURES

FICTIONAL DEMO DATA

Make Roi work your way

1. **Tone.** Professional, Casual, Analytical or Goal-focused
2. **Guidance.** Tell Roi about you once, for every answer
3. **Focus areas.** Topics Roi brings up first
4. **Skills.** Save a prompt, run it with /name
5. **What it may change.** Read only to full access, and when it asks first

THEN TRY

/weekly-check

Upload a photo of a contract note, then confirm

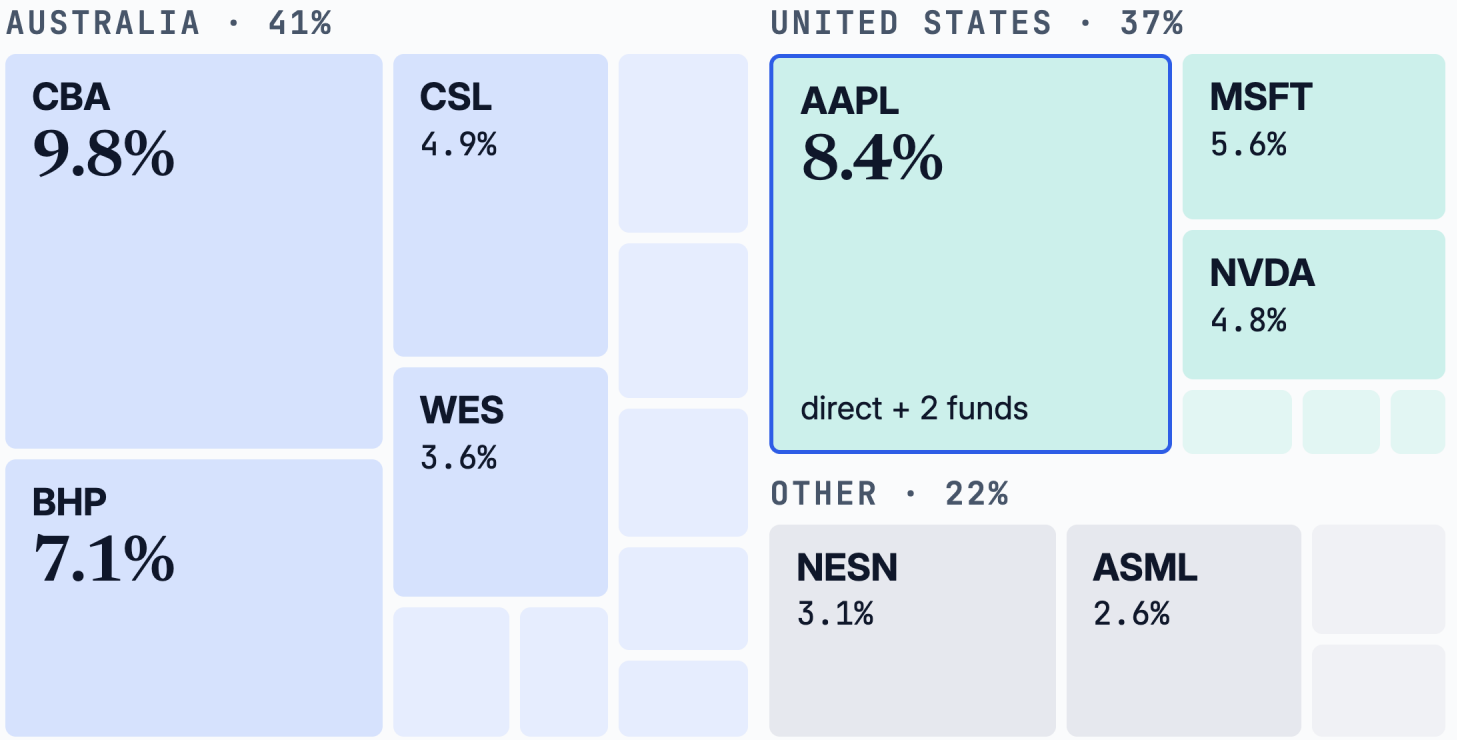
Roi only saves a change once you confirm it, unless you choose otherwise.

COMING SOON · PORTFOLIO X-RAY

LAUNCHING SOON FICTIONAL DEMO DATA

Everything you own, in one picture

- **Look through.** Every company you hold, directly and inside your ETFs and funds.
- **Bigger box, bigger exposure.** Each box's area is its exposure value.
- **Spot the overlap.** The ringed box is one company, held directly and in two funds.



AI TOOLS · MCP

Connecting Navexa to AI tools

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

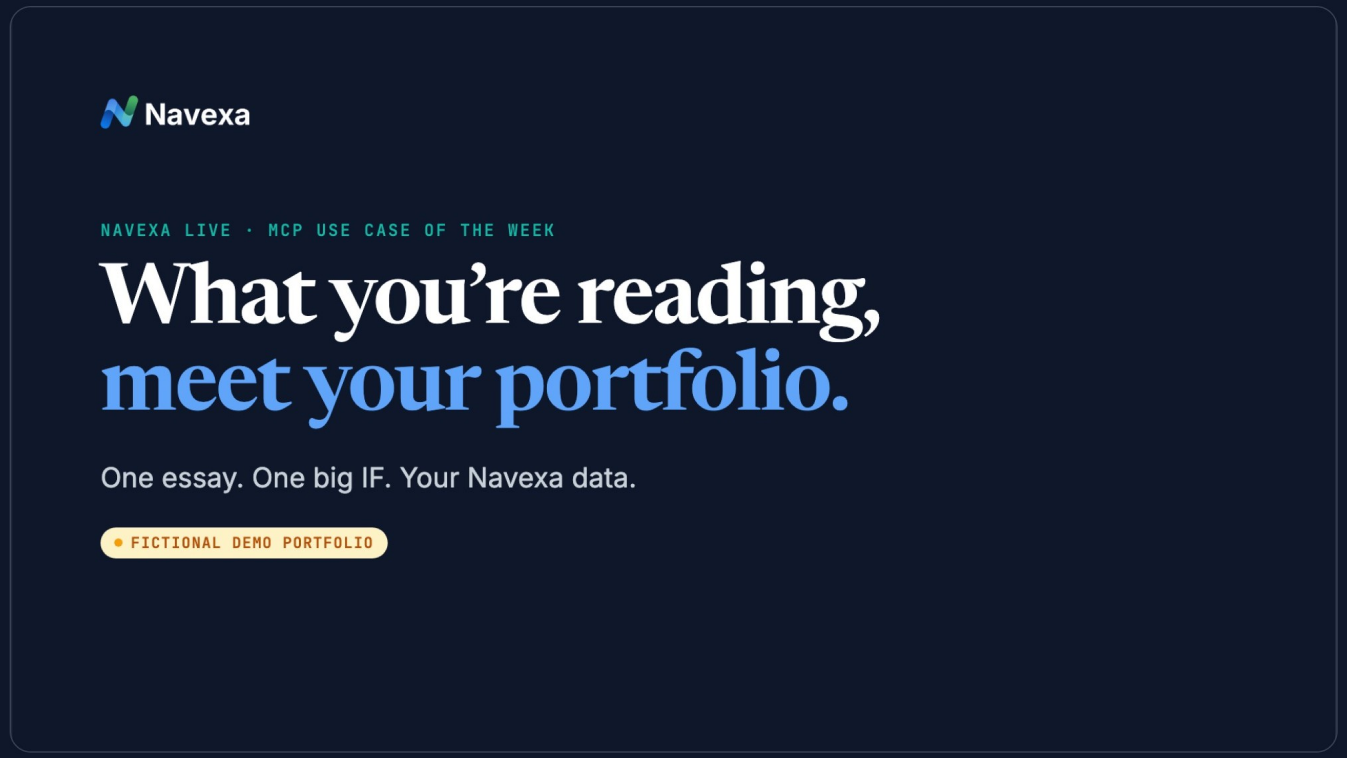


Today's example: something you're reading

Attach a PDF, then ask what it means for your portfolio.

▷ MCP USE CASE OF THE WEEK CLAUDE + NAVEXA CONNECTOR

What you're reading, meet your portfolio



THIS WEEK'S READ

Commanding Heights

LENGTH

0:41

TRY IT YOURSELF

Attach what you're reading, then ask what it means for your portfolio.

YOUR QUESTIONS · Q&A

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

NAVEXA LIVE · FEEDBACK

Have an idea for Navexa?

01

Search the board

Someone may have asked already.

02

Vote for a match

Votes help us understand demand.

03

Submit a suggestion

No match? Post your idea.

`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

NEXT NAVEXA LIVE

See you next Wednesday

11 November · 2 pm AEDT

Submit your questions when you register.

Help Centre
help.navexa.com

Ask Roi
In Navexa

YouTube
@navexa-support

Blog
navexa.com/blog