Navexa

NAVEXA LIVE · WEEKLY WEBINAR

Navexa Live with Tom & James

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

WHEN

Wednesday 11 November 2026
2:00 pm AEDT

PRESENTERS

Tom Wilson
James Tattersfield

TODAY

01 Portfolio X-Ray is live

02 Roi + X-Ray, and the new app

03 Is your portfolio 80/20?

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.

PORTFOLIO X-RAY

NOW LIVE FICTIONAL DEMO DATA

Portfolio X-Ray. Now available.

- See your company exposure
- Find overlap between your funds
- Spot repeated exposure
- Explore and export

TODAY'S DEMO PORTFOLIO

0

Nvidia shares held directly.

Three US ETFs: **SPMO, VOO, QQQM**. Direct shares: Micron, META, Apple and more.

X-Ray adds up what sits inside the funds.

Standard plans and above · fund exposures are estimates, each with a holdings date · general information, not advice

ROI + X-RAY

FICTIONAL DEMO DATA

Ask Roi about X-Ray

Select Ask Roi while you're in X-Ray.

01 One company, all the places you hold it

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Show my total Nvidia exposure in this
portfolio, including direct holdings and
exposure through ETFs and funds.
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02 How your funds overlap

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Tell me the overlap of each of my ETFs
and what holdings value they share the
most of.
```

X-Ray shows you the picture. Roi answers the question you actually had.

WHAT'S NEW · MOBILE APP 3.0.6

New in the Navexa app

01

Links open the app

Links in our emails and on the web open straight in the app, including links to Roi.

02

Import trades on your phone

Import a trade file in the app, then filter your transactions by import.

03

Smoother Roi

Cards load cleanly, attachments look tidier and links show more reliably.

Also new: SUMM files in the importer, for crypto.

AI TOOLS · MCP

Connecting Navexa to AI tools

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



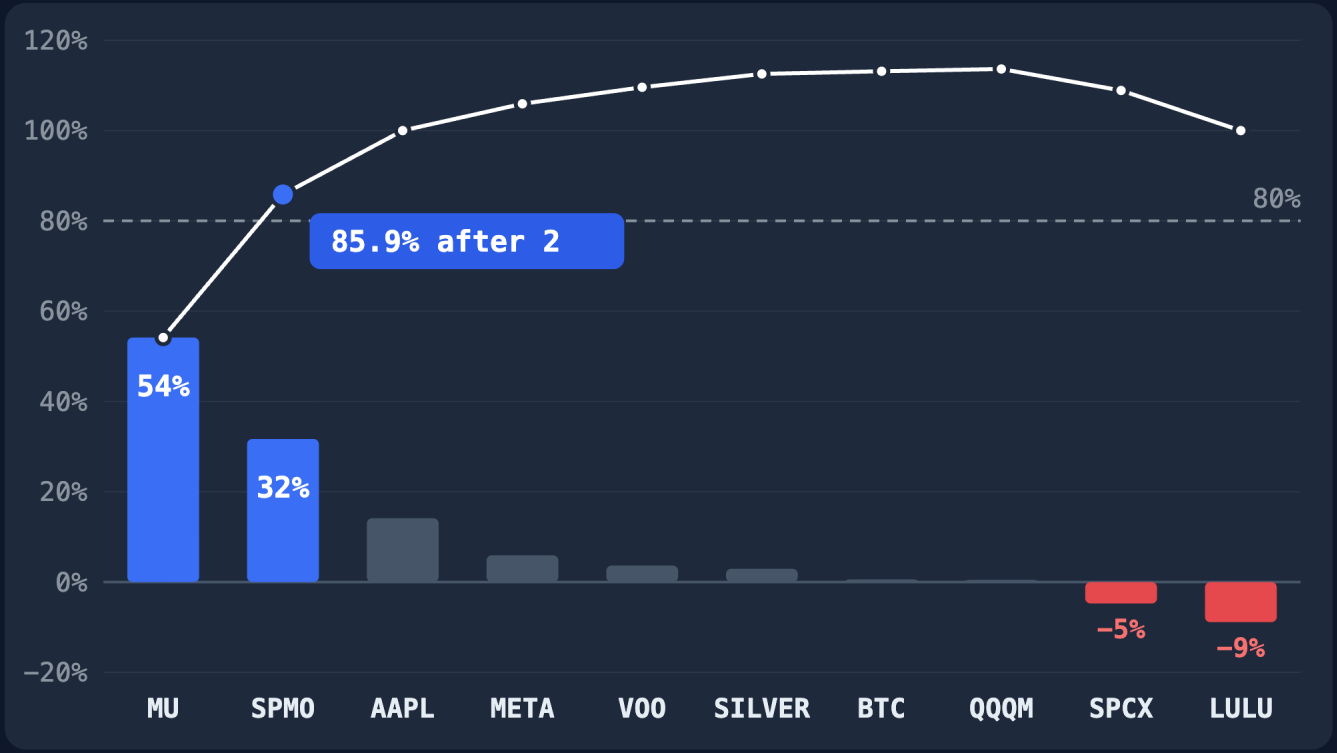
Today's example: is your portfolio 80/20?

A customer's question, asked of our demo portfolio. Facts only.

▷ MCP USE CASE OF THE WEEK CLAUDE + NAVEXA CONNECTOR

FICTIONAL DEMO DATA

Is your portfolio 80/20?



THE ANSWER

2 of 10 holdings made 86% of the return

VIDEO

0:38

THE PROMPT · TRY IT YOURSELF

“Using my portfolio in Navexa, do a Pareto analysis. Which ~20% of my holdings made ~80% of my return? Show it as a head-and-tail chart. Facts only, no recommendations.”

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

YOUR TURN

Open X-Ray tonight. Tell us one surprise.

Reply to the reminder email with the one thing that surprised you.

- Reply to the reminder email
- Show your own X-Ray on 18 November

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

18 November · 2 pm AEDT

Submit your questions when you register, or reply to show us your own X-Ray.

Help Centre
help.navexa.com

Ask Roi
In Navexa

YouTube
@navexa-support

Blog
navexa.com/blog