Navexa

NAVEXA LIVE · WEEKLY WEBINAR

Navexa Live with Tom & James

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

WHEN

Wednesday 25 November 2026
2:00 pm AEDT

PRESENTERS

Tom Wilson
James Tattersfield

TODAY

01 New on web: single days, calendar, chart events

02 A parcel report in Claude

03 Your questions, as we go

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.

NAVEXA WEB · IMPROVED 20 NOV

NEW

See any single day's performance

Pick one past day and see how your portfolio did on it.

01

Open the Portfolio page

In Navexa on the web.

02

Choose Custom range

Open the date range selector.

03

Pick the same date twice

The day you want, as both start and end.

Previous close to that day's close, not open to close.

Overnight and after-hours moves are counted, so the figure can differ from tools that measure from the open.

Navexa web · help.navexa.com · How the Date Range Selector Works · general information, not advice

NAVEXA WEB · NEW

NEW

Your investing calendar

Trades, income and CGT dates, all on one calendar.

01

Open Calendar

In the left menu on Navexa web.

02

Choose what to see

Tick portfolios, and switch event types on or off.

03

Click any event

See the details, then jump to the trade or holding.

Month or agenda view, across all your portfolios.

Includes a monthly income total and a link to your income forecast.

Navexa web · Calendar · general information, not advice

NAVEXA WEB · NEW

NEW

See events on your charts

Trades and income, marked right on a holding's performance chart.

01

Open a holding

Click any holding in your portfolio.

02

Switch on Events

The button above the performance chart.

03

Hover a marker

B is a buy, $ is income. Numbers group several.

Link the movement on the chart to what you actually did.

Hover shows the date and event, with the amount for income.

Navexa web · Holding page · general information, not advice

AI TOOLS · MCP

Connecting Navexa to AI tools

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



Today's example: a parcel report

Every parcel of one holding, after the AMMA statements, then a sale priced three ways in Scenarios. Facts only.

AI TOOLS · MCP · PARCELS

FICTIONAL DEMO DATA

A parcel report for a VAS investor

About A$500 a month into VAS since January 2023, with four AMMA statements along the way.

47	241	4	-A$62.60
parcels, one per monthly buy	units held, none sold	AMMA statements applied	cost base change after AMIT

COST BASE CHANGE BY STATEMENT, ALL 47 PARCELS

FY23	FY24	FY25	FY26
-A$1.10	-A$36.00	+A$24.50	-A$50.00

Navexa MCP · unrealised gains report · fictional portfolio · general information, not advice

AI TOOLS · MCP · SCENARIOS

FICTIONAL DEMO DATA

Same 20 units, three ways to pick them

Same day, same price (A$107.99), same cash. Only the parcels change.

SCENARIO A

FIFO

Oldest parcels first

REALISED GAIN

+A$377.67

ASSESSABLE GAIN

A$188.84

CASH FROM THE SALE

A$2,159.80

SCENARIO B

Minimise CGT

Saved method picks

REALISED GAIN

-A$74.76

RESULT

Net capital loss A$74.76

CASH FROM THE SALE

A$2,159.80

Wash sale flag: VAS bought 3 Nov, 21 days before

SCENARIO C

Manual

Middle parcels, held over 12 months

REALISED GAIN

+A$0.08

ASSESSABLE GAIN

A$0.04

CASH FROM THE SALE

A$2,159.80

Navexa Scenarios · simulation, not a recommendation · the decision is yours

PARCEL REPORT · TRY IT YOURSELF

FICTIONAL DEMO DATA

Ask it of your own portfolio

PROMPT FOR CLAUDE WITH THE NAVEXA CONNECTOR

```
I use Navexa. Use my portfolio "[portfolio name]" and the holding [VAS]. 1) Build a parcel report: every open parcel with its purchase date, units held, cost base after AMIT adjustments, unrealised gain, and whether it has been held over 12 months. Also list the parcels that were sold or part-sold in earlier years, and which sale used them. 2) Price a sale of [20] units today in three ways: using the saved CGT method, and with parcels I pick: [list parcels and units]. Show the realised gain, discount, assessable gain, cash and any wash sale warnings side by side. This is a simulation only. Do not tell me which to choose.
```

01

Name the holding and units

The connector only prices a sale you describe. Claude will not pick what to sell.

02

Check the AMMA statements

Cost base is only right once each year's statement is in. Ask Claude to check what is missing.

03

Save the one you like

Ask Claude to save a scenario. It then sits in Navexa Scenarios, ready to compare.

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

2 December · 2 pm AEDT

Submit your questions when you register, or reply with your Pareto.

Help Centre
help.navexa.com

Ask Roi
In Navexa

YouTube
@navexa-support

Blog
navexa.com/blog