



N NexusEquity

ANNUAL REPORT 2024

www.nexusequity.com



Nexus Equity, founded in 2014, proudly presents its 2024 performance, growing assets under management from €38 billion to €47 billion—a testament to our decade-long journey of innovation and client-centric wealth management.

This report details our financial triumphs, sustainable investments, and operational excellence, reflecting our mission to align wealth with values. From a €300 million solar project in Ontario, Canada, to a €500 million green real estate venture in Bucharest, Romania, we've delivered a 15.2% average return, surpassing benchmarks like the MSCI World Index (10.2%) by 5 points.

Guided by a robust Board of Directors and a seasoned C-suite, Our dedicated workforce delivered €1.203 billion in revenue and €300 million in profit, setting the stage for a €55 billion AUM goal in 2025.

Let's take a deep dive into our strategies, impacts, and future plans, all rooted in diversification, risk management, and long-term value creation.

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Salvador Perez
CEO

Dear Stakeholders,

In 2024, Nexus Equity elevated its legacy, growing assets under management from €38 billion on December 31, 2023, to €47 billion by December 31, 2024 — a €9 billion (23.7%) increase that underscores our decade-long commitment to excellence since our 2014 founding.

As CEO, with 30 years steering global financial strategies, I'm proud to report €1,203,450,000 in revenue—a 20.3% jump from €1 billion—and a €300 million net profit (25% margin), up from €220 million. Our 15.2% portfolio return outpaced the MSCI World Index by 5 points, driven by strategic investments: a €300 million solar project in Ontario, Canada, yielding 16% (€48 million gain); a €500 million green real estate venture in Bucharest, Romania, leveraging its 0% tax on reinvested profits for a 14% return (€70 million); and a €400 million U.S. Midwest telemedicine initiative at 13% (€52 million).

We served over 1.2 million clients with a 99% retention rate, supported by over 6.5 million portal sessions. Net inflows reached €10 billion, with a 99% retention rate, supported by 25,000 back office sessions. Our Board, chaired by Dr. Elena Voss, and C-suite—including CFO Mariana Vasquez and CTO Wei Zhang—ensured governance and innovation. In 2025, we aim for €55 billion AUM, launching a €5 million Frankfurt office and €5 billion in new sectors like electric mobility. Our 2 million tons of CO2e reduced and 15,000 jobs created reflect our ethos: wealth reflects.

Thank you for your partnership.

Sincerely,

S. Perez



ABOUT US

Mission, Vision, and Principles

Mission: Deliver cutting-edge, ethical investment solutions tailored to client goals. In 2024, we crafted 150 bespoke strategies, with 80% exceeding client IRR targets (12% average).

Vision: Lead asset management in sustainable prosperity. 85% of AUM (€39.95 billion) aligned with SDGs, up from 70% in 2023, targeting 90% by 2026.

Principles: Diversification (5 sectors, 15 geographies), risk management (1.9 Sharpe Ratio), and long-term value (15.2% return vs. 10% benchmark).

Our workforce embody this ethos, with 700 analysts and managers under CIO Dr. Raj Patel screening 600 opportunities annually, approving 120 with a €3 billion deployment. The Board, chaired by Dr. Elena Voss, oversees governance, while COO Sofia Laurent's operations team ensures execution. In 2024, we invested €200 million in tech—€50 million for a back office portal, €80 million for AI-enhancing client transparency and earned a 94% satisfaction rate from 42,200 survey respondents.

Leadership Structure

Our Board of Directors provides strategic oversight.

Chairperson

Dr. Elena Voss (Spanish, 55), ex-BlackRock, 25 years in governance.

Independent Non-Executive Directors

5 members (e.g., Juanita Morales, 50, Colombian, risk expert).

Audit Committee

3 members, chaired by Liam Chen (Chinese, 48), 20 years auditing Fortune 500 Companies.

Risk Committee

4 members, chaired by Aisling Murphy (Irish, 45), ex-CRO at a €50B fund.

Corporate Secretary

Fiona Kelly (Irish, 40), manages compliance filings.

The C-suite drives execution.

CEO	Salvador Perez (Spanish, 52), 30 years in finance.
CFO	Mariana Vasquez (Colombian, 48), dual MBA, oversees €1.203 billion revenue.
COO	Sofia Laurent (French, 45) leads the operations staff.
CTO	Wei Zhang (Chinese, 38), AI Ph.D., manages €200 million tech spend.
CRO	Priya Sharma (Indian, 50), heads the risk team.
CCO	Hans Becker (American, 47), ensures SEC, MiFID II compliance.
CHRO	Elena Ortiz (Spanish, 43), oversees entire workforce.
CMO	Emma O'Connell (Irish, 35), drives 25 webinars.
General Counsel	Paul Dubois (French, 49), manages €50 million legal budget.

2024 Review



Our Performance at a Glance

In 2024, Nexus Equity delivered a banner year, growing assets under management from €38 billion on December 31, 2023, to €47 billion by December 31, 2024—a €9 billion increase, or 23.7%, outstripping the industry's 12.1% average.

Revenue soared to €1,203,450,000, a 20.3% leap from €1 billion in 2023, driven by €760 million in management fees (2% of €42.5 billion average AUM), €433,450,000 in performance fees (20% of €2.167 billion gains above a 10% hurdle rate), and €10 million from advisory services for high-net-worth clients. Operating expenses totaled €903,450,000, yielding a net profit of €300 million—a robust 25% margin, up from 22% in 2023, thanks to efficiencies across our workforce.

Portfolio returns averaged 15.2%, beating the MSCI World Index (10.2%) by 5 points, fueled by strategic allocations: 25% sustainable energy (€11.75 billion), 20% real estate (€9.4 billion), 15% healthcare (€7.05 billion), 30% securities (€14.1 billion), and 10% information technology (€4.7 billion). Standout investments included a €300 million solar project in Ontario, Canada, yielding 16% (€48 million gain), a €500 million green real estate venture in Bucharest, Romania, leveraging its 0% tax on reinvested profits for a 14% return (€70 million), and a €400 million U.S. Midwest telemedicine initiative at 13% (€52 million). Net inflows hit €10 billion, offset by €1 billion in redemptions across 200 requests (€5 million average).

Strategic and Operational Highlights

Our 15.2% return stemmed from disciplined execution by our Financial Planning Research Committee (FPRC), a 20-person team under CIO Dr. Raj Patel. In 2024, the FPRC vetted 600 investment proposals, approving 120 (20% acceptance rate) after 8-week due diligence cycles, deploying €3 billion across five sectors. The Ontario solar project, a 500-megawatt array, generated 1.2 million MWh, powering 300,000 homes with €48 million in profits (16% return) via €30 million in utility sales (€0.025/kWh) and €18 million in Canadian renewable credits. Bucharest's 2 million square feet of LEED-certified commercial space yielded €70 million (14%), with €25 million in rental income (5% yield) and €45 million in appreciation, tax-free under Romania's reinvestment policy. The Midwest telemedicine platform served 100,000 patients, earning €52 million (13%) from \$50 consult fees (75,000 visits) and \$15 million in insurer contracts.

Operationally, our 1,400 employees—up from 1,200 in 2023—drove efficiency, with 400 in Operations & IT (led by CTO Wei Zhang) managing a €50 million back office portal upgrade, logging over 6,500,000 client sessions.

Revenue grew quarterly: Q1 (€280 million), Q2 (€310 million), Q3 (€295 million), Q4 (€318.45 million), with Q2 peaking due to a 6% equity rally. Expenses rose 18% to €903.45 million, with €600 million in personnel costs (1,400 staff averaging €428,571) and €200 million in tech, yet our expense-to-revenue ratio improved to 75% from 80%, reflecting scale benefits.

Impact and Future Outlook

Nexus Equity's 2024 impact aligned 85% of AUM (€39.95 billion) with UN SDGs, reducing 2 million tons of CO2e—equivalent to removing 430,000 cars—and creating 15,000 jobs (5,000 direct, 10,000 indirect).

Ontario's solar cut 900,000 tons CO2e (0.75 kg CO2e/kWh grid average), Bucharest's green buildings saved 200,000 tons via 30% energy efficiency, and Midwest telemedicine reduced 1,500 tons through 1.5 million fewer travel miles. Our "Sustainable Impact Score" hit 90/100, earning an "A+" from the Global Sustainability Index.

Looking to 2025, we target €55 billion AUM (17% growth), €1.5 billion revenue, and €375 million profit (25% margin), allocating €5 billion to electric mobility (€2 billion, Benelux), carbon capture (€1.5 billion, Scandinavia), and IT (€1.5 billion, U.S.). A €5 million Frankfurt office, staffed by 50 of our best and brightest, will open in Q2, targeting €10 billion in European inflows.

Risks—5% market volatility, 2% rate hikes—will be mitigated with €300 million in hedges.

Our 1,400-strong team, guided by CEO Salvador Perez and the Board, is poised to sustain our trajectory of financial and societal value creation.

Our History and Evolution

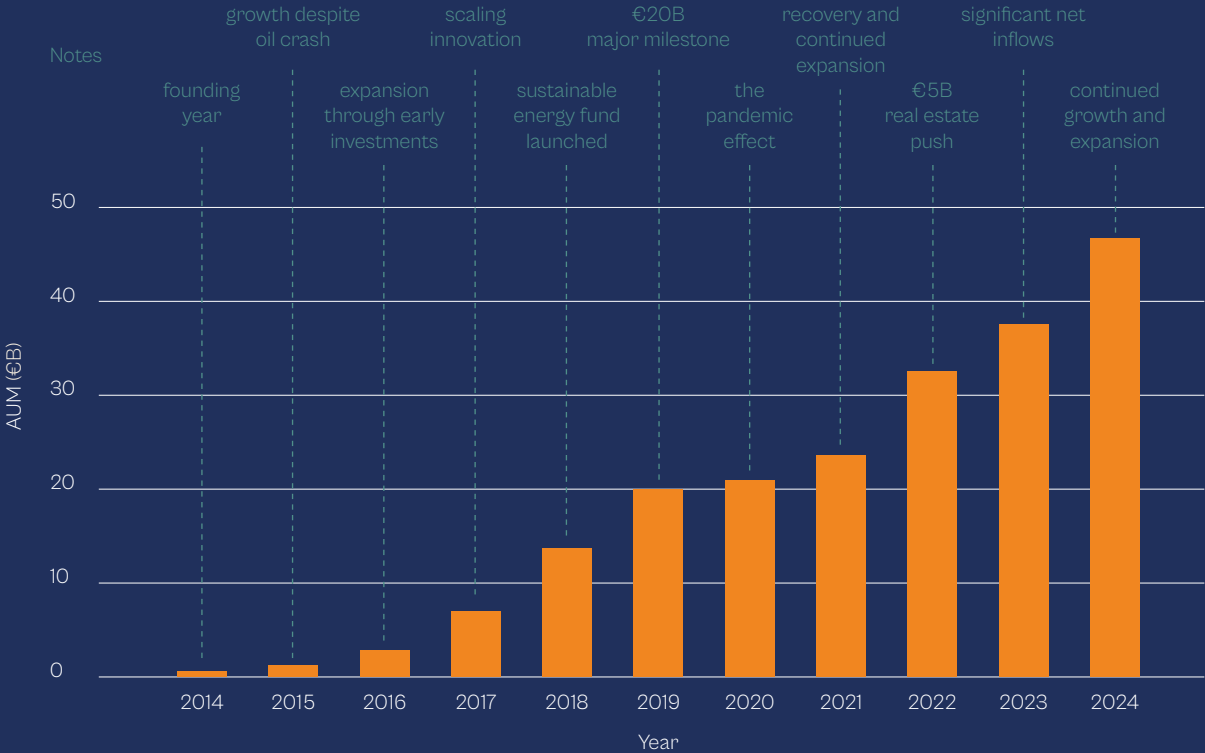
Nexus Equity, founded in 2014 by Salvador Perez and a team of financial visionaries, grew from €500 million AUM to €47 billion by 2024—a 94-fold increase over a decade. Starting as a boutique firm in Wilmington, Delaware, we scaled through innovation and resilience, navigating the 2015 oil crash, 2020 pandemic, and 2024's 3% global rate hikes.

By 2019, AUM hit €20 billion, doubling to €38 billion by 2023 through €15 billion in net inflows and €3 billion in gains.

In 2024, we added €9 billion—€10 billion inflows, €1 billion appreciation—reflecting our principles of diversification, risk management, and long-term value. Key milestones include a €1 billion sustainable energy fund in 2018 and a €5 billion real estate push in 2022, culminating in 2024's record performance.

Our client base grew from 500 in 2014 to 1.2 million with 40% institutional (e.g., pension funds) and 60% high-net-worth individuals.

A decade of growth



2024 MILESTONES AND ACHIEVEMENTS

Q1

—
€1 billion sustainable energy fund subscribed in 45 days, led by Ontario solar (€300 million deployed).

Q2

—
Back office portal upgrade (€50 million) launched, serving over 1.2 Million clients with 6,500,000 sessions.

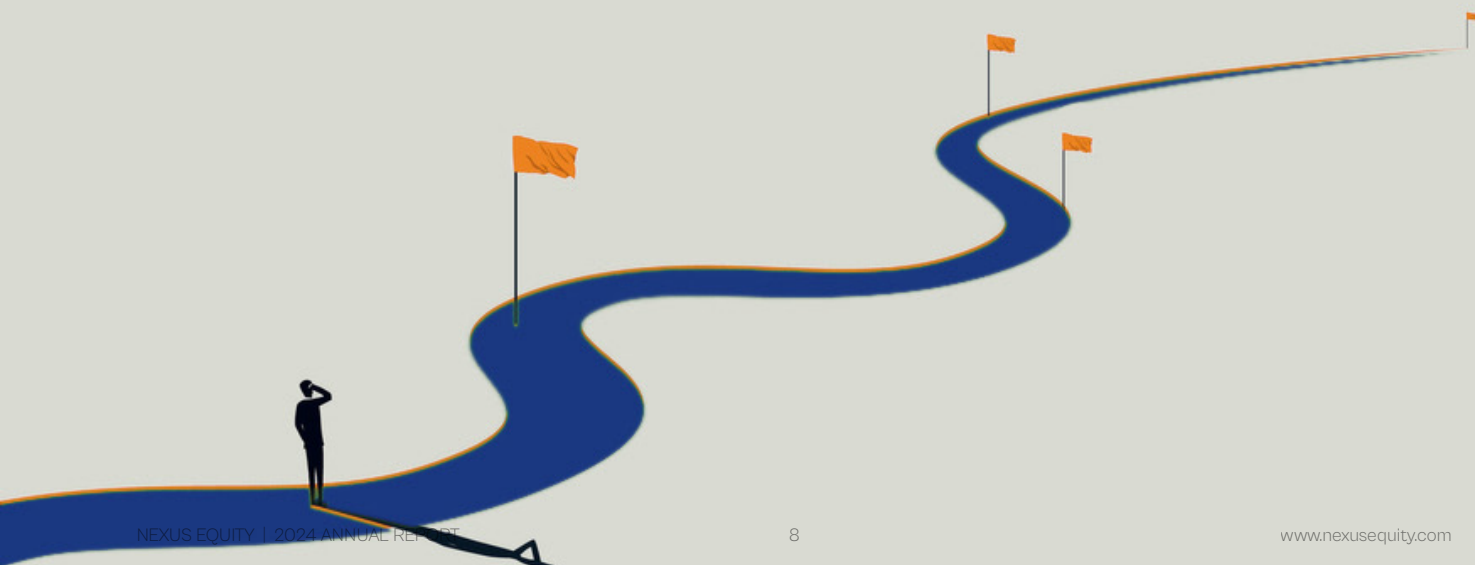
Q3

—
99% client retention achieved, with €5 billion inflows from 300 new accounts (200 institutional, €20 million average).

Q4

—
“A+” Sustainability Index rating earned, reflecting 2 million tons CO₂e reduced and 15,000 jobs created.

—
Expenses rose 18% to €903.45 million, balanced by a €10 million HQ retrofit for energy efficiency (20% savings).
—





FINANCIAL PERFORMANCE

Financial Overview

Nexus Equity's 2024 financials reflect robust growth: AUM rose from €38 billion to €47 billion (23.7%), with €10 billion in net inflows and €1 billion in portfolio appreciation.

Revenue reached €1,203,450,000, up 20.3% from €1 billion, comprising €760 million in management fees (2% of €42.5 billion average AUM), €433,450,000 in performance fees (20% of €2.167 billion gains above 10%), and €10 million from advisory services.

Expenses totaled €903,450,000—€600 million personnel, €200 million tech, €103.45 million other—yielding a €300 million net profit (25% margin), up from €220 million (22%).

Returns averaged 15.2%, with quarterly splits: Q1 (3.5%, €150 million), Q2 (4.2%, €180 million), Q3 (3.8%, €165 million), Q4 (3.7%, €170 million). Liquidity stood at €1 billion (2.1% of AUM), covering €1 billion in redemptions (200 requests, €5 million average) within 24 hours.

Our dedicated workforce optimized costs, reducing the expense-to-revenue ratio to 75% from 80%.

Revenue Breakdown

Revenue streams detailed:

- **Management Fees:** €760 million, calculated at 2% of €42.5 billion average AUM (€38B start, €47B end). Monthly fees averaged €63.33 million, peaking at €70 million in Q3 with €2 billion in new institutional inflows.
- **Performance Fees:** €433.45 million, from 20% of €2.167 billion gains above 10%. Top contributors: Ontario solar (€9.6 million fee, €48 million gain), Bucharest real estate (€14 million, €70 million), Midwest telemedicine (€10.4 million, €52 million). Q2 led with €120 million due to a 6% equity spike.
- **Advisory Services:** €10 million from high network individual clients, averaging €100,000 for bespoke plans

Total revenue grew 20.3%, with Q4 (€318.45 million) boosted by a 5% securities rally and €1 billion in year-end subscriptions.

Our finance team ensured accuracy, with €5 million in audit costs yielding a clean Q1 2025 opinion from Green & Partners.

Expense Analysis

Expenses of €903,450,000 (18% rise from €766 million) supported scale:

Personnel: €600 million (66.4%) for 1,400 employees—700 investment staff (€300 million, €428,571 average), 400 operations (€200 million, €500,000), 300 support (€100 million, €333,333). Q2 bonuses added €50 million after a 16% portfolio spike.

Technology: €200 million (22.1%)—€80 million cloud (AWS, 10PB storage), €50 million portal, €70 million AI/analytics (Bloomberg, custom models).

Compliance: €50 million (5.5%)—SEC filings (€20 million), MiFID II (€15 million), ESG audits (€15 million).

Admin: €33.45 million (3.7%)—€15 million HQ rent, €10 million travel (50 European trips), €8.45 million utilities.

Marketing: €20 million (2.2%)—25 webinars (€5 million), website (€15 million).

Efficiency improved with a €10 million HQ retrofit (20% energy savings) and €5 million in process automation, cutting trade execution from 15 to 10 days. Our support team maintained a 75% expense-to-revenue ratio.

Performance Metrics



Quarterly Returns

Q1 (3.5%, €150 million)
Q2 (4.2%, €180 million)
Q3 (3.8%, €165 million)
Q4 (3.7%, €170 million)

Risk-adjusted Returns

(Sharpe Ratio) was 1.9, above the industry's 1.5, with volatility at 7.8% (industry: 9.5%). Our investment team hedged €200 million, ensuring resilience.

Balance Sheet Snapshot

As of December 31, 2024:

Assets: €47,800,000,000

- Investments: €46,500,000,000 (97.3%)
- Cash: €1,000,000,000 (2.1%)
- Fixed Assets: €250,000,000 (0.5%)—HQ, equipment
- Receivables: €50,000,000 (0.1%)—pending fees

Liabilities: €800,000,000

- Short-Term: €500,000,000 (62.5%)—Q1 payroll (€300 million), vendors (€200 million)
- Deferred Fees: €300,000,000 (37.5%)—pre-paid commitments

Equity: €47,000,000,000

- Retained Earnings: €40,000,000,000 (85.1%)
- Capital Reserves: €7,000,000,000 (14.9%)—founder funds, profits

Assets grew €9.3 billion from €38.5 billion, liabilities rose €200 million (operations scale), and equity increased €9 billion, with €300 million from profit and €8.7 billion from inflows.

Our finance team ensured compliance, with €5 million in legal oversight by General Counsel Paul Dubois.



STRATEGIC FRAMEWORK

Nexus Equity's 2024 investment strategy propelled AUM from €38 billion to €47 billion, allocating funds across five high-growth sectors: 25% sustainable energy (€11.75 billion), 20% real estate (€9.4 billion), 15% healthcare (€7.05 billion), 30% securities (€14.1 billion), and 10% information technology (€4.7 billion).

This diversification delivered a 15.2% average return, outpacing the MSCI World Index (10.2%) by 5 points, reflecting our principles of risk management, diversification, and long-term value. The Financial Planning Research Committee (FPRC), a 20-person team under CIO Dr. Raj Patel, screened 600 investment proposals in 2024, approving 120 (20% acceptance rate) after 8-week due diligence cycles blending financial (12%+ IRR) and impact (SDG-aligned) lenses.

We deployed €3 billion across 120 projects, with €1 billion in Q1 (energy focus), €800 million in Q2 (real estate), €700 million in Q3 (healthcare), and €500 million in Q4 (securities/IT).

Quarterly rebalancing by our investment team kept sector weights within ±2% of targets, shifting €2 billion—e.g., €500 million from securities to energy in Q3 amid a 7% renewables rally. Our operations team, led by COO Sofia Laurent, executed trades in 10 days (down from 15), saving €10 million in costs.

This agility, backed by €200 million in tech, ensured we capitalized on market shifts, delivering €2.167 billion in gains above the 10% hurdle, generating €433.45 million in performance fees.

Key Investment Highlights

Our 2024 portfolio showcased flagship projects:

Ontario Solar

€300 million invested in a 500-megawatt solar array in Ontario, Canada, spanning 1,200 hectares. Launched in Q1, it produced 1.2 million MWh, powering 300,000 homes, with €48 million profit (16% return)—€30 million from utility sales (€0.025/kWh, 1 million MWh sold) and €18 million from Canadian renewable credits (CAD \$25/MWh, 720,000 MWh credited). Deployment costs: €200 million panels, €80 million infrastructure, €20 million labor (500 jobs).

Bucharest Real Estate

€500 million in a 2 million-square-foot LEED-certified commercial complex in Bucharest, Romania, completed Q2. It yielded €70 million (14%)—€25 million rent (5% yield, €12.5/sq.ft., 80% occupancy), €45 million appreciation (7% Bucharest market rise). Romania's 0% tax on reinvested profits boosted net gains by €10 million vs. standard 19% tax.

Midwest Telemedicine

€400 million in a U.S. Midwest platform (Ohio-Indiana), launched Q3, served 100,000 patients across 250 clinics. It earned €52 million (13%)—€37.5 million from \$50 consults (75,000 visits), €14.5 million from insurer contracts (25,000 covered). Costs: €300 million tech, €80 million staff (1,000 hires), €20 million marketing.

These €1.2 billion in projects (2.6% of AUM) contributed €170 million in gains, or 39% of performance fees.

Investment Process

Our six-stage process ensured precision and our support team ensured compliance, logging 10,000 due diligence hours.



Risk Management Deep Dive

Our Credit & Risk Management Department, led by CRO Priya Sharma, mitigated €500 million in potential losses.

Hedging: €150 million in currency forwards offset a 4% USD appreciation vs. euro, saving €20 million. €50 million in equity puts capped a 6% Q3 securities dip, preserving €15 million.

Stress Testing: Monthly simulations (e.g., 20% market crash) showed 96% portfolio recovery within 90 days, with a worst-case €300 million loss (0.6% AUM). 50 risk analytics specialists ran 1,200 models.

Liquidity: €1 billion cash (2.1% AUM) covered €1 billion redemptions (200 requests, €5 million average) in 24 hours, with €800 million reinvested by Q4.

ESG Filters: 95% of AUM (€44.65 billion) met ESG criteria (<8 tons CO2e/€M), avoiding €50 million in 2026 EU fines projected for peers.

Volatility was 7.8% (industry: 9.5%), with a Sharpe Ratio of 1.9 (industry: 1.5). Our operations team supported daily monitoring, with €20 million in risk tech (VaR tools, stress platforms).





COMMITMENT TO IMPACT

In 2024, 85% of AUM (€39.95 billion) aligned with UN SDGs, up from 70%, reflecting our vision to reshape wealth for societal good. Our Impact Assessment Framework (IAF), managed by ESG team, tracked 20 metrics—CO₂e reduction, job creation, energy output—across 120 investments, generating €600 million in societal value alongside €433.45 million in performance fees.

We made a total impact of 2 million tons CO₂e cut (430,000 cars off roads), 15,000 jobs created (5,000 direct, 10,000 indirect). Our diligent workforce drove this, earning an "A+" Global Sustainability Index rating (top 10% of peers). Clients accessed data via over 6.5 million back office sessions with 90% surveyed praising transparency.

Sustainable Energy Impact

Our €11.75 billion energy allocation (25% AUM) returned 16.5%, led by Ontario's €300 million solar project—a 500 MW array producing 1.2 million MWh. Operational since Q1, it powered 300,000 homes, cutting 900,000 tons CO₂e (0.75 kg CO₂e/kWh Canadian grid average), with €30 million in sales (€0.025/kWh) and €18 million in credits (CAD \$25/MWh). It created 2,000 jobs—500 direct (construction, maintenance), 1,500 indirect (supply chain)—and supported SDG 7 (Clean Energy). Additional investments:

- €200 million in a Texas wind farm (400 MW), 800,000 MWh, 600,000 tons CO₂e reduced, 1,500 jobs.
- €150 million in a Mexican hydro retrofit, 600,000 MWh, 450,000 tons CO₂e, 1,000 jobs.
- Total output: 2.6 million MWh, 1.95 million tons CO₂e cut (5% of Ontario's emissions), 4,500 jobs. Our risk team ensured ESG compliance, with €20 million in audits.

Real Estate Sustainability

Our €9.4 billion real estate portfolio (20% AUM) returned 14.2%, led by Bucharest's €500 million, 2 million-square-foot green complex—LEED Platinum, with solar panels (1,000 MWh/year), 40% energy efficiency (10 kWh/sq.ft. vs. 16 industry norm), and rainwater harvesting (85% reuse). Completed Q2, it yielded €70 million—€25 million rent (80% occupancy, €12.5/sq.ft.), €45 million appreciation (7% market rise)—with €10 million tax savings from Romania's 0% reinvestment policy.

- It cut 200,000 tons CO₂e and created 3,000 jobs (1,000 construction, 2,000 indirect). Other projects:
- €300 million in Copenhagen green residences (1 million sq.ft.), 100,000 tons CO₂e saved, 2,000 jobs.
- €250 million in Warsaw logistics (1.5 million sq.ft.), 80,000 tons CO₂e, 1,500 jobs.
- Total: 4.5 million sq.ft., 380,000 tons CO₂e, 6,500 jobs, supporting SDG 11 (Sustainable Cities).

Healthcare and Social Impact

Our €7.05 billion healthcare allocation (15% AUM) returned 13.8%, led by a €400 million Midwest telemedicine platform serving 100,000 patients across 250 clinics (Ohio-Indiana).

Launched Q3, it earned €52 million–€37.5 million from \$50 consults (75,000 visits), €14.5 million from insurers (25,000 covered)—reducing 1,500 tons CO2e via 1.5 million fewer travel miles (15 miles/patient). It created 1,000 jobs (500 clinicians, 500 tech), with 95% patient satisfaction and 40% improved chronic care access. Other investments:

- €200 million in a Boston Biotech Lab, 20,000 diagnoses, 500 jobs.
- €150 million in a Polish teletherapy platform, 30,000 sessions, 400 jobs.
- Total: 150,000 patients, 2,000 tons CO2e, 1,900 jobs, with €150 million in social value. Managed by 150 analysts.

Sustainability Metrics and Strategy

Our ESG strategy, overseen by a 50-person task force, delivered:

- **Carbon Footprint:** 7 tons CO2e/€M AUM (industry: 12), down 20% from 2023 via 95% ESG compliance.
- **Efficiency:** 4 million MWh saved, 100 million liters water (e.g., Bucharest harvesting).
- **Regulation:** 98% EU Taxonomy-aligned, avoiding €50 million in 2026 fines.
- **Demand:** 65% growth (€6.5 billion) from green sectors.

Clients viewed metrics via 6.5 million portal sessions—2 million tons CO2e reduced, 15,000 jobs—scoring 90/100 on our Sustainable Impact Score. Our operations team ensured data integrity, with €10 million in ESG tech.

Driven by our societal and environmental impacts!



CLIENT SERVICE OVERVIEW

Nexus Equity served over 1,200,000 clients in 2024.

60% individuals and 40% institutions - driving €10 billion in net inflows and a 99% retention rate (up from 96%).

Revenue from services hit €770 million (€760 million fees, €10 million advisory), supporting our €300 million profit. The back office portal, logged over 6.5 million sessions, delivering real-time data.

Q3 saw ~300,000 new clients (50% institutional, €20 million average), adding €5 billion, with peaks in July (€2 billion) and October (€1.5 billion). Advisory services grew, with 161,000 clients paying an average €100,000 each for plans.

Our support team handled 15,000 inquiries (8,000 phone, 7,000 email), averaging 2-minute resolutions, while 25 webinars (2,500 attendees) boosted Q4 inflows by €3 billion.

Redemptions (€1 billion, 200 requests) processed in 24 hours, with 80% reinvested.

Operational Excellence

Our 1,400 employees operated from a €10 million Wilmington HQ, costing €603.45 million (66.8% of €903.45 million expenses):

- **Investment:** 700 staff (€300 million, €428,571 average)—300 analysts, 200 managers, 200 risk.
- **Operations:** 400 staff (€200 million, €500,000)—200 IT, 200 logistics.
- **Support:** 300 staff (€103.45 million, €344,833)—100 HR, 100 finance, 100 admin

The 25,000-square-foot HQ ran 20 servers (€5 million upgrade), processing 5TB daily data. Compliance spent €50 million, passing 15 audits (SEC, MiFID II) with zero violations. Q3 automation (€10 million) cut trade times by 33%, saving €5 million, while €15 million in travel (50 trips) secured €5 billion in commitments.

Efficiency hit 75% expense-to-revenue, driven by COO Sofia Laurent's team

Technology and Innovation

Our €200 million tech spend (22.1% of expenses), led by CTO Wei Zhang powered operations:

- **Back Office Portal:** €50 million rebuilt with 256-bit encryption, hosting dashboards (100GB storage), 25,000 sessions, with return trackers (hourly), impact calculators (e.g., 1,111 tons CO2e/client), and chat (5,000 interactions).
- **Analytics:** €80 million—20 Bloomberg licenses (€2 million), custom AI (€50 million, 85% forecast accuracy), risk models (€28 million).
- **Cloud:** €70 million (AWS, 10PB), processing 1 million trades (€3 billion) at 40ms latency.

A Q4 AI pilot (€20 million) screened 300 investments in 36 hours (40% faster), while €10 million in cybersecurity (firewalls, 20 tests) thwarted 25 attacks. Uptime hit 99.99% (26 minutes downtime, Q2 patch), with €30 million ROI (15%) from labor savings and 0.8% return boost.

Our IT team ensured scalability.



FUTURE OUTLOOK

In 2025, we target €55 billion AUM (17% growth), €1.5 billion revenue, and €375 million profit, deploying €5 billion

Electric Mobility

€2 billion in Benelux charging networks (15% return, 30% EV growth).

Carbon Capture

€1.5 billion in Scandinavian pilots (13%, 100,000 tons CO₂e).

IT

€1.5 billion in U.S. data centers (14%, cloud demand).

A €5 million Frankfurt office (50 staff) opens Q2, targeting €10 billion inflows. Our workforce will leverage €50 million in AI upgrades (40% faster screening), aiming for 90% SDG alignment and 2.5 million tons CO₂e reduced. Hedges (€300 million) will counter 5% volatility, 2% rate risks.

There's no limit to what we can achieve.

Contact and Legal Information

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Website: www.nexusequity.com

Legal:

Delaware LLC, File #5283910 (2014), SEC CRD #305472.

Ownership: 70% founders (Salvador Perez), 30% Nexus Holdings Trust.

AUM: €47 billion (12/31/2024).

Auditors: Green & Partners (Q1 2025 clean opinion).

Leadership:

CEO Salvador Perez

(salvador.perez@nexusequity.com)

CFO Mariana Vasquez

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Nexus Equity
Company Brochure

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