

# Global Leader in Robo-Advisory Technology

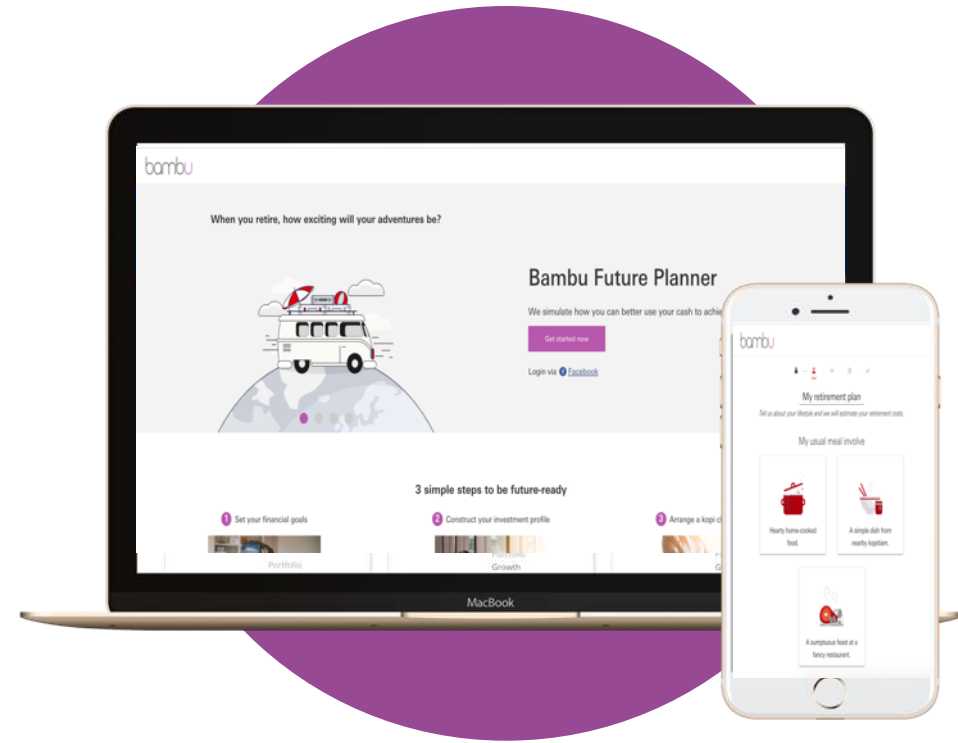
bambu

[www.bambu.life](http://www.bambu.life)

# We are making wealth **simple**

People believe saving and investing  
*is complicated and expensive.*

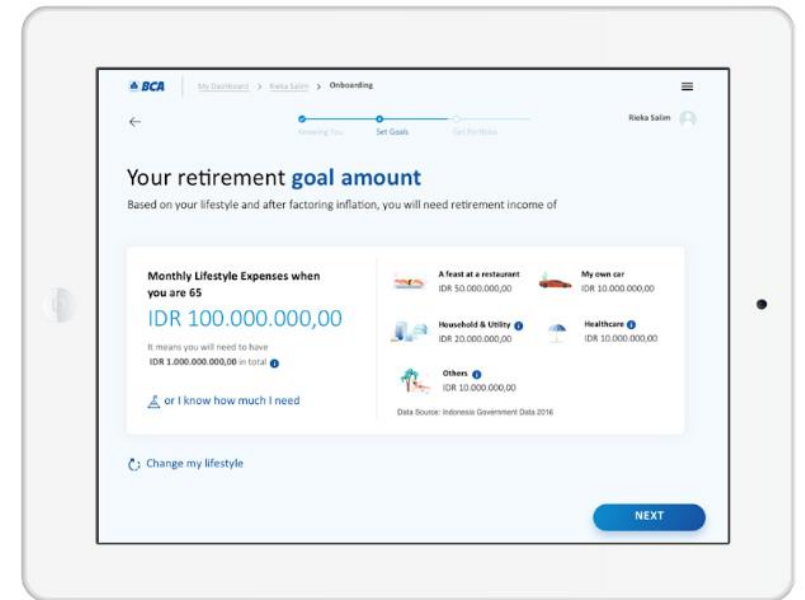
Bambu uses **intelligent** software  
*to make wealth **simple.***



# We are Goal Based Investing

Our philosophy is focused on offering end customers real outcomes through goal based investing.

We help **your** customers identify and prioritise their goals by using intuitive journeys, goal helpers and health checks.

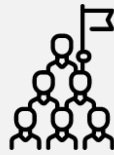


# Bambu Milestones



**US\$14M+**

Funding from  
Franklin Templeton  
and Peak6



**75+ people**

Across product, delivery,  
investment, and data teams.



**First**

Live Robo platform  
launched in Singapore



**Winner**

Finovate Africa 2018  
Finovate Asia 2017  
FinTech Finals 2017  
The Asset Awards 2017



**18 clients**

We work with leading FI's  
across ASEAN, EMEA, and US.

## Our Clients and Investors



BEANSTOX

PEAK6

CONNECT  
by CROSSBRIDGE

# Bambu Goal Journey

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← BACK

Goal

People like you are investing in these goals.  
What's yours?



Retirement



Kid's Education



Grow Wealth



[I Have Other Goals In Mind](#)

# Bambu Goal Journey

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← BACK

Goal



**Tell us about your child's education plan and we will estimate the cost for you.**

My daughter ▼ is 14 years old.

She will attend university at the age of 18

NEXT

 [I already know how much I need](#)

# Bambu Goal Journey

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← BACK



**Tell us about your child's education plan and we will estimate the cost for you.**

I am preparing her college fees for



Medicine



Other Majors

 [I already know how much I need](#)

# Bambu Goal Journey

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← BACK



**Tell us about your child's education plan and we will estimate the cost for you.**

I want her to study in

|   |  |  |
|---|--|--|
| <br>USA       | <br>UK          | <br>Canada    |
| <br>Australia | <br>New Zealand | <br>Singapore |

 [I already know how much I need](#)

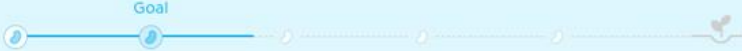


# Bambu Goal Journey

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**Based on your child's education plan and after factoring inflation, the total tuition fee will cost**

**\$292,159**



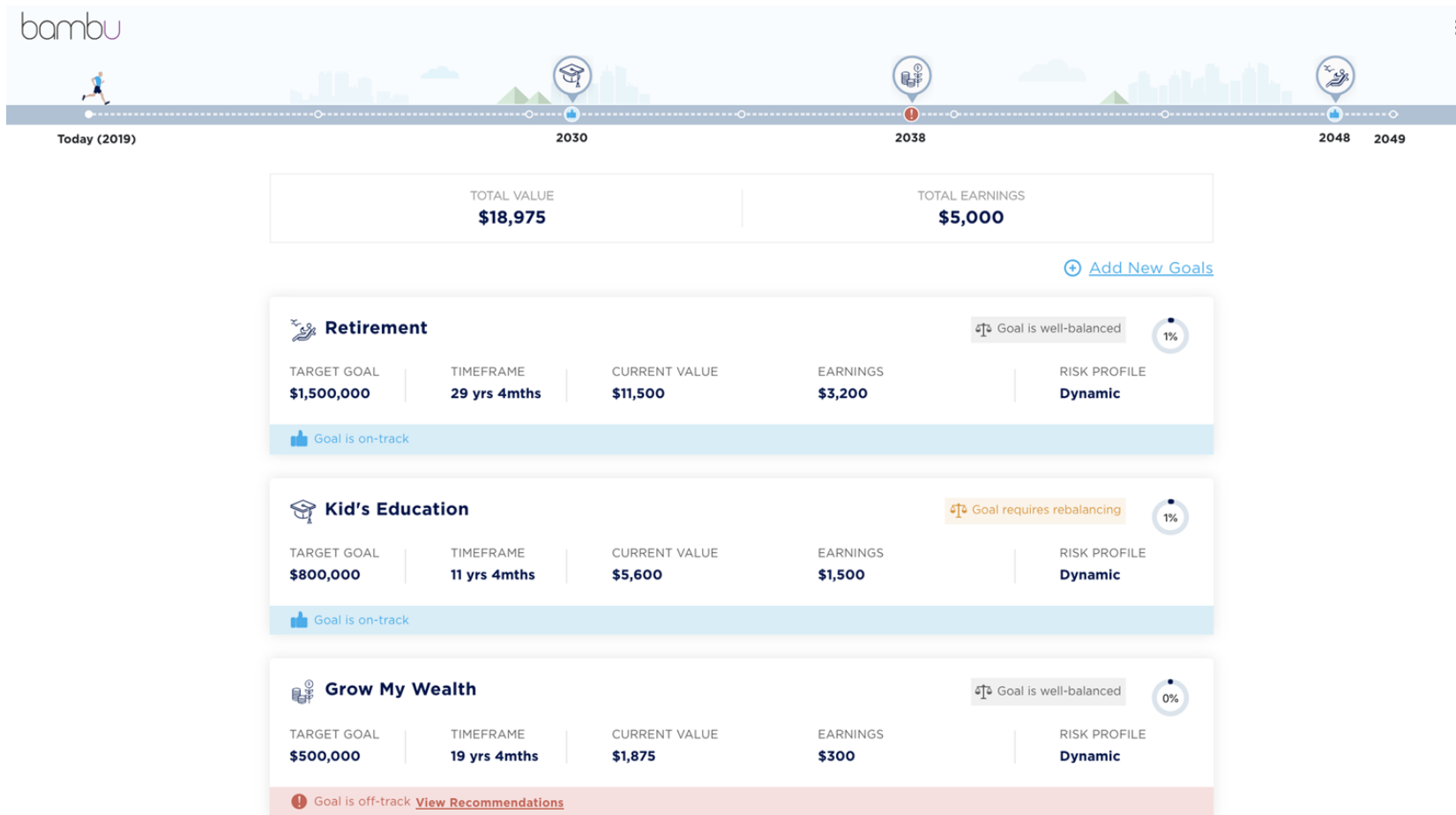
Major in Medicine



in USA

NEXT

# Bambu Dashboard



# Bambu Goal Healthcheck

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## Your Grow My Wealth Goal is off-track



Here's our recommendation to put your goal back on-track. Please select an action to proceed.

-   
Top up one time deposit of **\$159,890**
-   
Increase monthly contribution to **\$14,496**
-   
Reduce goal amount to **\$56,443**
-   
Increase goal year to **2040**



CANCEL PROCEED

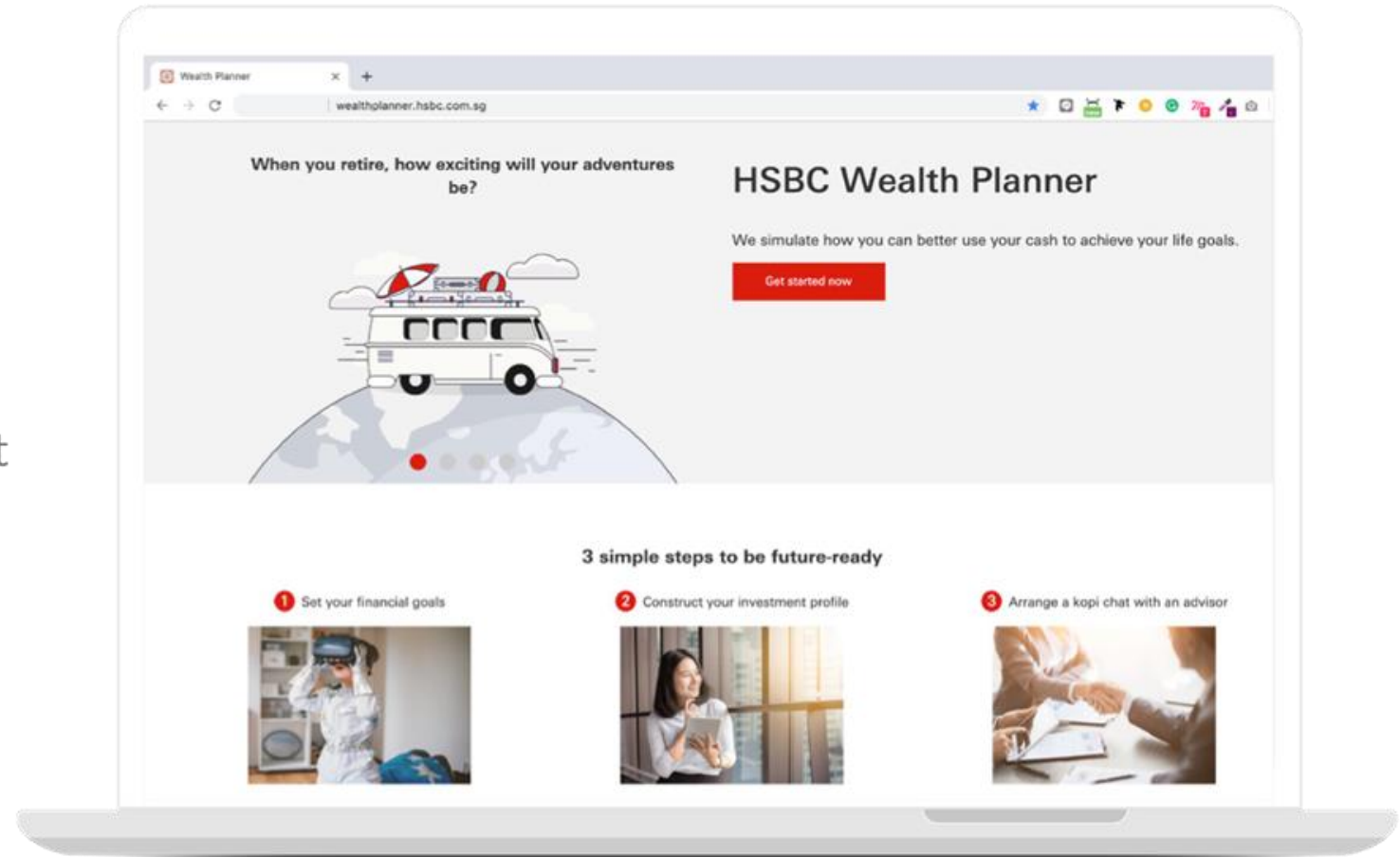
# Bambu Go & Bambu Build

|                                    | Bambu Go  | Bambu Build  |
|------------------------------------|--|---|
| <b>Institution Type</b>            | Small/Medium FS, Advisors, Fintech   | Large Regional & Global FS  |
| <b>UX/ UI</b>                      | Minor customisation to colours, logo and aesthetics  | Fully customised - user journeys, flow, full front-end configuration                            |
| <b>Device</b>                      | Responsive desktop   | Customisable - Responsive desktop, mobile   |
| <b>Features</b>                    | Core Bambu Features  | Core Bambu Features + customisable functionality  |
| <b>Investment Options</b>          | Upload model portfolios - Limited by product universe  | Unlimited & customised  |
| <b>Regulatory License Required</b> | Yes  | Yes   |
| <b>Integration</b>                 | Integration only to Apex & Saxo (more announced soon)  | Custom Integrations   |
| <b>Timeline</b>                    | 2 months   | 9-12+ months  |
| <b>Cost</b>                        | \$5,000 per month min. + \$1 per user per month  | Upfront + \$1 per user per month  |

## Our Product

# B2C Robo Advisory Tool

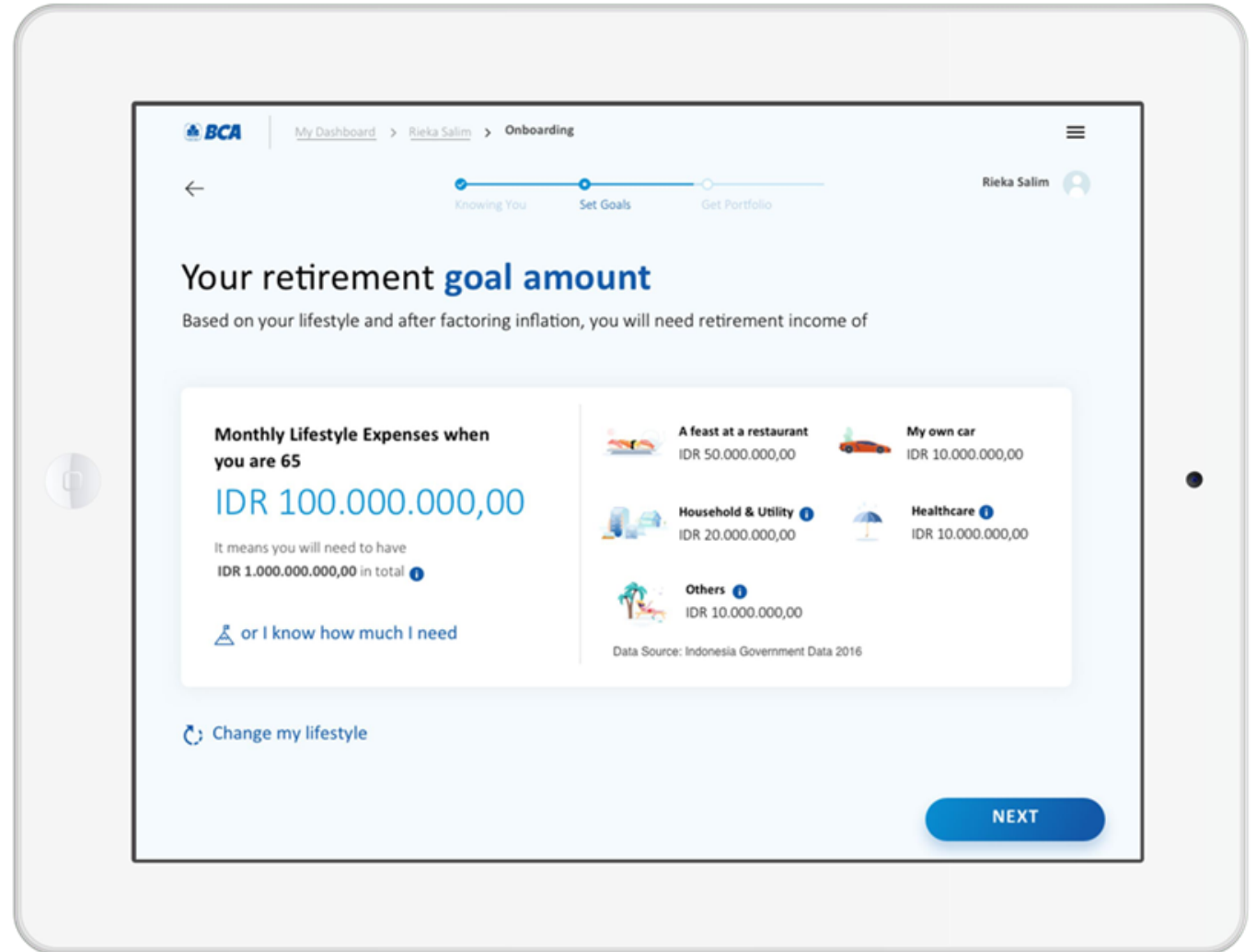
We help our client to develop a goal-based investment tool to reach out to a wider market and generate more leads.



## Our Product

# Agent facing client robo advisory tool

A tool to help Personal Bankers (PBs) create a seamless experience from creating their customers' profile to set up goals with the use of goal-helper to help them calculate the target goal.

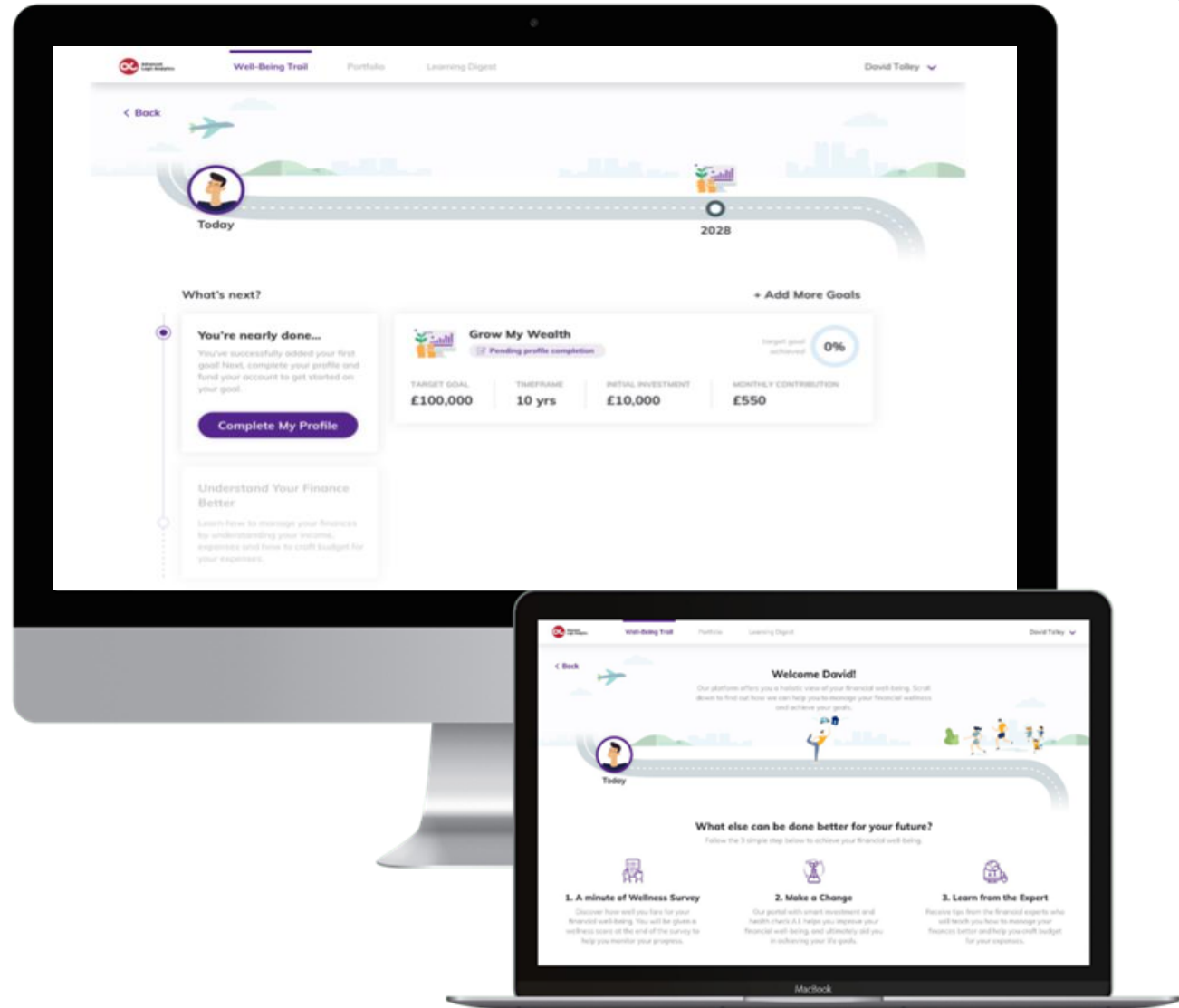


# Our Product

## Employee Benefits

A tool that helps employees cultivate savings habit and improve their financial well-being by auto-investing part of their salary each month and to incentivise them with the company's contribution.

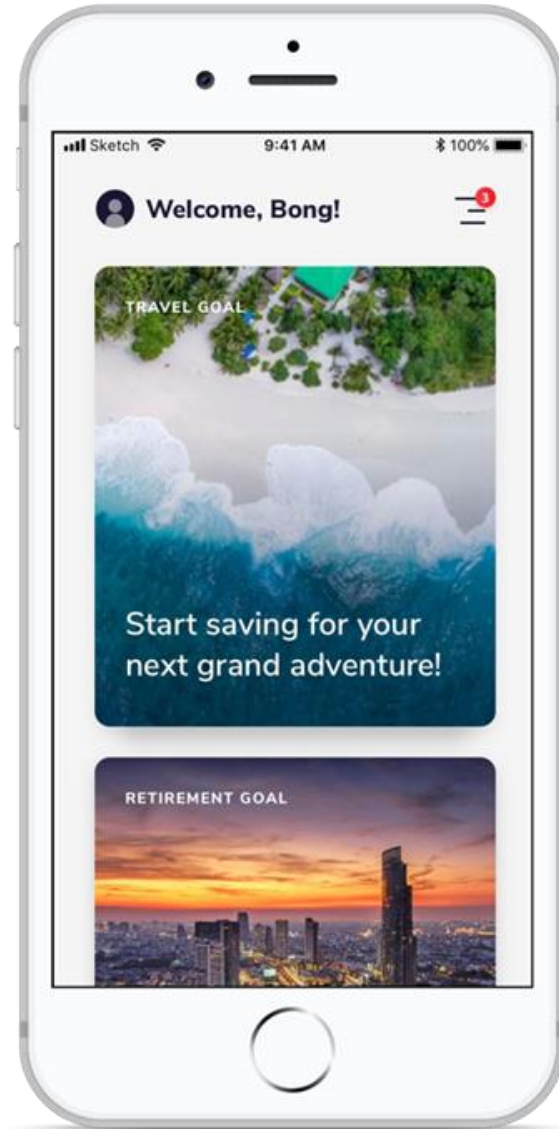
The platform assesses users' financial health and guides them in achieving their financial well-being before helping them set up their investment plan with their spare cash.



## Our Product

# B2C Robo Advisory Tool (mobile-native app)

A mobile-native robo that aims to be adopted by users like a lifestyle app, where users can use on a regular basis to set up goal-based investment, perform transactions and track their goals.





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**“Finance isn’t  
changing, it has  
changed”**

**Nick Wakefield**  
Managing Director, EMEA

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