ROBOFUNDS

SYSTEMATIC INVESTMENT MODELS & QUANTITATIVE INFRASTRUCTURE

WHITE-LABEL B2B PARTNER BRIEF
FOR FUND MANAGERS, MANCOS & WEALTH INSTITUTIONS

Bespoke Investment Recipes – Powered by AI, Delivered Under Your Brand

Launch systematic funds, AMCs, or model portfolios without building an expensive in-house quant team. You define the mandate and constraints – our algorithms optimize and deliver ready-to-execute rebalancing weights directly via API or email.

+24.81% / +15.02%
Robofunds Global YTD 2026 / Annualized Since Inception

6-Month Dry-Run
Parallel Live Validation Before Full Contract

100% White-Label
Your Brand, Your Custody & Full IP Protection

HOW IT WORKS: FROM YOUR MANDATE TO EXECUTION-READY WEIGHTS

01 / YOUR MANDATE (INPUT)
Custom Rules & Constraints
Specify universe (e.g., max 20 French equities), sector caps, ESG filters, liquidity thresholds, and target volatility.

02 / ROBOFUNDS ENGINE
AI Optimization + Human Oversight
Our proprietary models analyze fundamentals, risk, and momentum. Every rebalancing signal is verified by our investment team.

03 / YOUR DELIVERY (OUTPUT)
Automated Rebalancing Recipes
Receive exact ISIN weights, trade deltas, and real-time risk metrics (VaR) via REST API or encrypted CSV/email.

FLEXIBLE MANDATE BUILDING BLOCKS

- **Universe & Geography:** Global equities, regional focus (e.g., Europe, Nordics, France), or thematic baskets.
- **Portfolio Concentration:** Concentrated high-conviction mandates (15–20 stocks) or broadly diversified portfolios.
- **Risk & Compliance Guardrails:** Hard-coded single-stock caps, sector limits, turnover budgets, and liquidity rules.
- **Rebalancing Cadence:** Fixed schedules (monthly/quarterly) or dynamic threshold-based triggers.
- **Seamless Integration:** Keep your existing custodian, ManCo, and execution desk—zero operational disruption.

SAMPLE OUTPUT DELIVERY

Mandate Example: "European Quality 20" (Rebalance File)

ISIN	Security	Target	Delta
FR0000121014	LVMH Moët Hennessy	**6.50%**	**+1.20%**
FR0000120578	Sanofi SA	**5.80%**	**-0.40%**
FR0000120271	TotalEnergies SE	**5.20%**	**+5.20%**
FR0000121972	Schneider Electric	**5.00%**	**+0.65%**

Delivery: REST API / SFTP / Email • Includes real-time VaR & exposure metrics.

RISK-FREE ONBOARDING & SCALABLE COMMERCIAL MODEL

STEP 1 • WEEK 1
Mandate Scoping
Joint workshop to define investment universe, constraints, and technical delivery format.

STEP 2 • WEEKS 2–4
Prestudy & Backtest
Full historical simulation, stress tests, and risk/return report tailored to your exact fund rules.

STEP 3 • OPTIONAL
6-Month Dry-Run
Run our live signals in parallel against a shadow portfolio for 6 months to verify performance before signing.

STEP 4 • LIVE
Production & Scale
Automated API/email delivery. Optional execution support. Aligned fee model based on bps of AUM + minimum fee.

Ready to test our algorithms on your next mandate?
Schedule a confidential walkthrough with our investment team.

Robofunds Global A/S • CVR 44247445
info@robofunds.dk • +45 26 23 44 44 • robofunds.dk/white-label

For professional investors and institutional partners only. Historical performance (+24.81% YTD as of Nov 14, 2026; +15.02% p.a. since inception) is not a reliable indicator of future results.