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# BUILDING A NEW STAGE OF INTELLIGENT RESEARCH BASED ON INVESTMENT EDUCATION

## CONNECTING PROFESSIONAL EDUCATION, FINANCIAL RESEARCH, AND INTELLIGENT TECHNOLOGY

Making investment knowledge more systematic and market learning more efficient; prioritizing student interests and using practical experience as the best teaching method, providing not only fish but also the skills to fish.



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Since its establishment in 2019, Neomics Institute has consistently focused on investment education and financial technology research and development. Through professional courses, research frameworks, market cases, and digital tools, it helps learners build a more complete knowledge system.

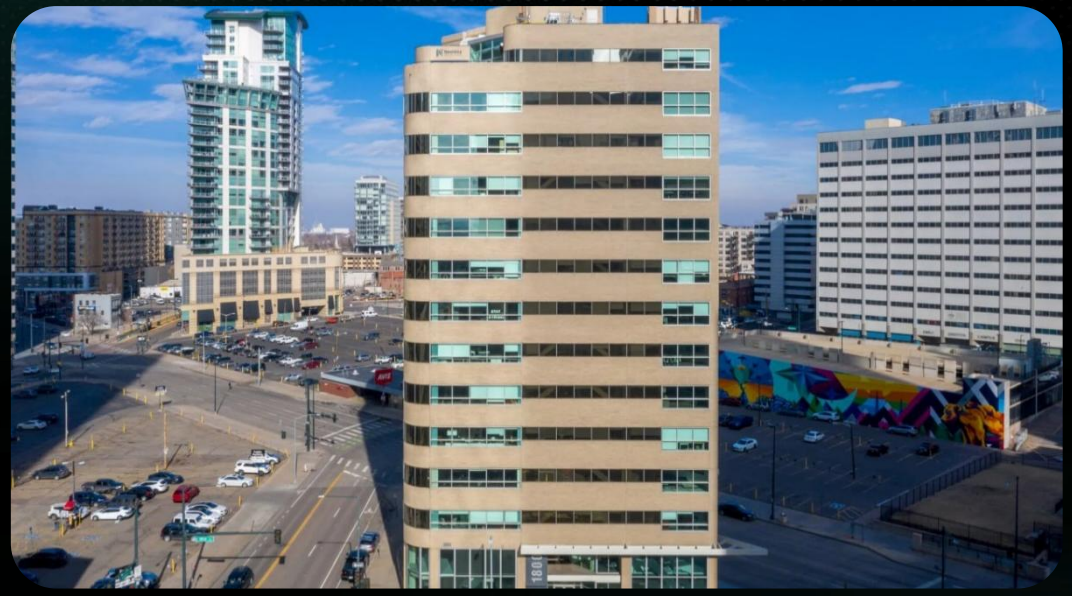
MAIN CONTENT

With Quantora’s evolution from version 1.0 to its current 4.0 beta phase, the institute is further exploring new paths for the synergistic development of education, data research, and digital technology.

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# COMPANY BACKGROUND

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Founded in Colorado, USA in 2019, Neomics Institute is a professional academy focused on investment education and fintech research and development. The institute combines systematic investment knowledge, market research methodologies, case studies, and digital technology to provide learners with a clearer and more comprehensive learning framework.

The institute's curriculum covers stocks, funds, bonds, foreign exchange, commodities, cryptocurrencies, asset allocation, and macroeconomics, integrating market structure, asset characteristics, corporate fundamentals, risk control, historical cases, and real-time market observations to help learners understand the research logic behind market changes.

As market information continues to expand, Neomics Institute is driving the development of Quantora, adhering to an education-based, technology-assisted approach to further explore the synergistic development of investment education and digital research tools.



# DEVELOPMENT HISTORY

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Since its founding in 2019, Neomics Institute has consistently focused on long-term development in investment education, research methodologies, and fintech. From curriculum development to Quantora R&D, the institute has gradually formed a development path combining education, data, model analysis, and risk validation.

## 2019 | INSTITUTE ESTABLISHMENT

Founded in Colorado, USA, establishing its focus on investment education and fintech R&D.

## EDUCATION SYSTEM DEVELOPMENT | IMPROVING THE LEARNING FRAMEWORK

Gradually establishing curriculum content covering stocks, funds, bonds, foreign exchange, commodities, cryptocurrencies, asset allocation, and macro markets.

## QUANTORA R&D LAUNCH | DRIVING DIGITAL RESEARCH

Transforming knowledge organization, data processing, research steps, and risk identification into a sustainable and iteratively validated research process.

## CURRENT STAGE | QUANTORA 4.0 INTERNAL TESTING

Focusing on testing system stability, interpretability, data processing, and risk response capabilities.

## QUANTORA 1.0–4.0 | CONTINUOUS EVOLUTION

Evolving from a knowledge base to real-time observation, multi-model analysis, order validation, and a research and risk closed loop.

# VISION, MISSION, AND CORE VALUES

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Neomics Institute is committed to investment education as its foundation, extending to professional research and financial technology. Through systematic knowledge, market observation, and digital tools, it enhances learners' information comprehension, independent judgment, and risk awareness. The Institute prioritizes student interests, emphasizing both practice and methodology, ensuring learners not only acquire knowledge but also master independent research methods.



## VISION

To drive investment education towards greater systematization, digitalization, and practical application, making professional knowledge and research methods more understandable and continuous.

## EDUCATION

Prioritizing student interests, emphasizing both foundational knowledge and practical training, advocating that "hands–on experience is the best teaching method," and connecting the learning process with the real market environment.

## MISSION

To help learners build a complete investment knowledge framework and rational analytical abilities through courses, case studies, data research, and research support tools.

## TECHNOLOGY

Leveraging Quantora as a technological fulcrum, improving the efficiency of information processing, research analysis, and verification, while maintaining interpretability, data traceability, and risk identifiability.

# INDUSTRY TRENDS

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The financial market is entering a stage of development characterized by more diverse information sources and more frequent data updates. The connections between macroeconomic indicators, publicly available corporate data, market information, and financial events are becoming increasingly complex. Investment education is also gradually shifting from traditional knowledge transmission to a more comprehensive, dynamic, and contextualized learning model, placing higher demands on information organization and research methods.

Simultaneously, data processing, information retrieval, and digital learning tools are gradually entering the field of financial education, providing new technological support for data organization, historical information comparison, and research process presentation. The industry's focus is also gradually shifting from simply improving the speed of information acquisition to enhancing content relevance, research transparency, and learning efficiency.

## KEY SENTENCE

Financial education is entering a new stage where knowledge, data, practice, and digital research are interconnected.

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# EVOLUTION OF INVESTMENT EDUCATION

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In the past, investment learning relied more on textbooks, courses, and historical cases, focusing on mastering asset classes, market rules, and basic concepts. As the learning content continues to expand, simply mastering knowledge is no longer sufficient to cope with increasingly complex market environments. Learning objectives are beginning to extend to understanding data, comparing context, and analyzing conditions.

Modern investment education places greater emphasis on the research process and practical application. Learners need to integrate company data, the macro environment, market changes, and historical cases to understand the relationships between different pieces of information and gradually develop their own analytical framework, rather than simply memorizing conclusions.

The Neomics Institute emphasizes both practice and methodology, improving learning efficiency through information organization, case studies, and market observation. This allows learners to acquire knowledge and master independent research methods, achieving simultaneous improvement in both the knowledge itself and the skills required for independent research.



# EDUCATION SYSTEM

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The Neomics Institute constructs its investment education system from a multi-asset and macro perspective, covering both traditional financial markets and digital asset markets. Through foundational knowledge, characteristic analysis, and case studies, it helps learners build a broader understanding of different markets and the relationships between asset classes.



## STOCKS

Learn the relationship between company fundamentals, industry development, financial data, and market performance.



## FUNDS

Understand fund types, portfolio characteristics, management methods, and allocation strategies under different investment objectives.



## BONDS

Understand the impact of interest rates, maturity, credit quality, and the macro environment on the bond market.



## FOREIGN EXCHANGE

Understand exchange rate changes, the international economic environment, and the linkages between major currencies.



## COMMODITIES

Learn about supply and demand changes and market influencing factors in energy, metals, and other commodities.



## MACRO MARKETS

By combining economic data, policy changes, and the global market environment, we establish a broader perspective on market observation.



## CRYPTOCURRENCY

Understand cryptocurrency market structures, price formation, liquidity characteristics, market participation, and key risk factors through public information and historical cases.

# TEACHING AND RESEARCH METHODS

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The Neomics Institute's teaching method emphasizes the integration of knowledge comprehension and practical research processes. The course first helps learners grasp market fundamentals, asset characteristics, and basic research frameworks. Then, through financial data, macroeconomic data, public information, and historical records, it cultivates the ability to read and organize different types of market information.

Building on this foundation, the Institute guides learners to compare information changes, research basis, and risk conditions under different environments, combining historical cases and real-time market observations. Practical training not only focuses on the final results but also emphasizes the judgment-making process, enabling learners to gradually understand the relationships between different factors.

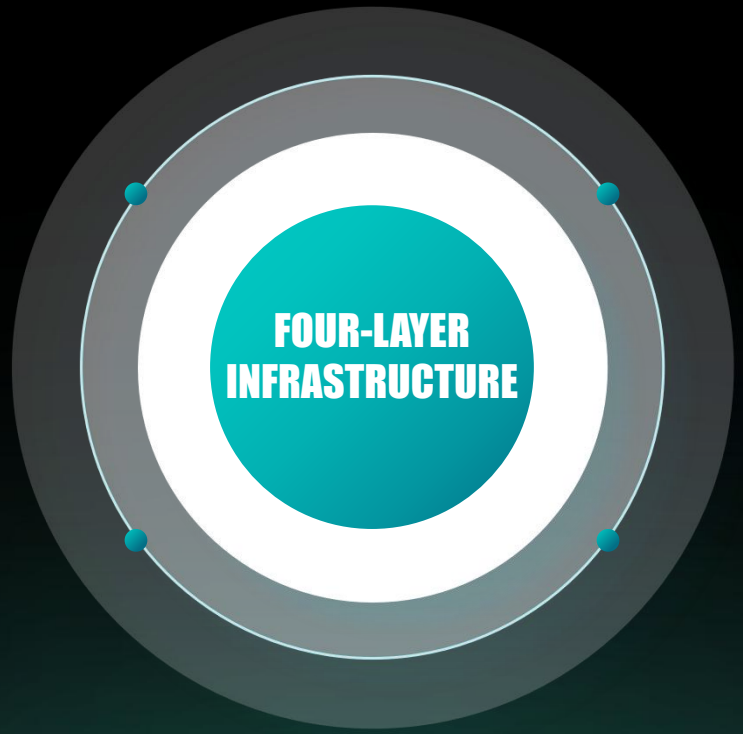
The Institute adheres to the principle that "practice makes perfect," creating a continuous process of knowledge acquisition, data reading, case training, and independent judgment. This allows learners to acquire knowledge while also developing independent research and continuous learning abilities.

Basic Knowledge → Data Reading → Case Training → Market Observation → Independent Judgment

# QUANTORA 1.0: KNOWLEDGE AND DATA FOUNDATION

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Quantora 1.0 represents a significant stage in Neomics Institute's digital organization of investment knowledge, research methodologies, and market data. The development team categorized resources by asset class, market terminology, macroeconomic indicators, company data, and risk factors, transforming course content, historical case studies, and research materials into searchable and interconnected structured knowledge, laying the foundation for subsequent data processing and model analysis.




### KNOWLEDGE LAYER

Integrates course knowledge, market concepts, research methodologies, and historical case studies.

### TAGS LAYER

Establishes categorized tags for assets, themes, events, and risk factors.

### DATA LAYER

Organizes macroeconomic data, company data, and publicly available market information.

### RETRIEVAL LAYER

Quickly locates and connects relevant knowledge and data content according to research criteria.

# QUANTORA 2.0: REAL-TIME DATA AND DYNAMIC OBSERVATION

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Building upon the knowledge and data foundation of Quantora 1.0, Quantora 2.0 introduces real–time market data processing capabilities, enabling research content to connect with the ever–changing market environment. The system begins receiving price changes, trading activity, macroeconomic events, and publicly available market information, and through time synchronization and classification processing, organizes data from different sources into a continuous research record.





This stage focuses on enhancing the ability to track market changes. The system can identify abnormal data, extract key features, and compare them with historical data, historical market replays, and existing knowledge frameworks to observe the correlation between different times, events, and market states.

Quantora 2.0 thus evolves from a static knowledge retrieval tool into a dynamic research aid, establishing a more stable data foundation for subsequent model analysis and controlled validation.

Data Access → Time Synchronization → Anomaly Identification → Feature Extraction → Dynamic Observation

# QUANTORA 3.0: MODEL ANALYSIS AND ORDER VALIDATION

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Building upon real–time data and dynamic observation, Quantora 3.0 further incorporates data models, market scenario identification, historical backtesting, and multi–model comparison, shifting the research process from ”observing changes” to ”analyzing, judging, and validating results.”

## MODEL ANALYSIS

The system invokes appropriate analytical frameworks based on different market conditions to comprehensively assess trends, volatility, liquidity, event impact, and risk exposure, comparing the judgment criteria and results of different models.

## ANALYSIS-CONNECTION-VALIDATION

Model Judgment → Condition Filtering → Risk Review → Test Commands

Only results meeting preset research and risk conditions will proceed to the next stage of validation.

## ORDER VALIDATION

The system generates test commands in historical replay, simulated real–time market conditions, and internally controlled environments, recording trigger conditions, reference price, execution price, slippage, position size, and drawdown. Testing is paused in cases of abnormal volatility, data delays, or exceeding risk limits.

Quantora 3.0, through the combination of ”analysis + validation,” lays the foundation for 4.0 research collaboration and risk closure.

# QUANTORA 4.0: INTELLIGENT RESEARCH AND RISK LOOP

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With the continuous increase in research materials, real-time data, public news, and historical test records, the existing functional modules of Quantora need further coordination. Therefore, Quantora 4.0 upgrades upon the achievements of the previous three generations, integrating knowledge, data, models, and risk management into a more complete research environment.

Quantora 4.0 assists in organizing public information, identifying key variables, comparing different market scenarios, and forming structured research content that includes background, basis, applicable conditions, and main risks through text information processing, knowledge association, multi-model collaboration, and dynamic risk identification.

Compared to versions 1.0 to 3.0, which focused on knowledge organization, dynamic observation, and model validation respectively, 4.0 places greater emphasis on the collaboration between different research stages. It continuously improves the research process through validation, review, and feedback, making information sources, analytical basis, and risk conditions more clearly presented and traceable.



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# QUANTORA 4.0 TECHNICAL ARCHITECTURE

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Quantora 4.0 employs a layered technical architecture, integrating information processing, knowledge association, model analysis, research output, order verification, and risk control into a unified system. This ensures stable connections between different modules in the research process, maintaining content traceability, logical interpretability, and process verifiability.

## DATA LAYER

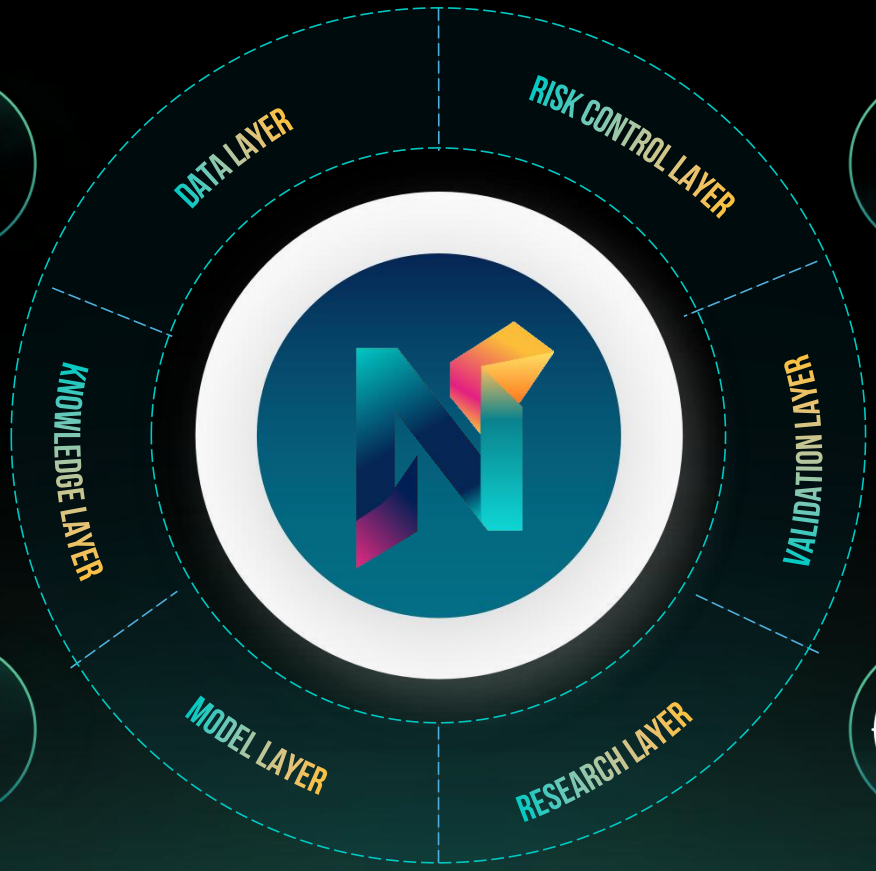
Receives real-time market data, trading volume changes, macroeconomic indicators, publicly available corporate information, financial news, and historical data.

## KNOWLEDGE LAYER

Integrates the academy's knowledge base, research methodologies, market concepts, and historical cases to form a coherent research foundation.

## MODEL LAYER

Through multi-model collaboration, it comprehensively analyzes trends, volatility, event impact, liquidity, and risk exposure.




## RESEARCH LAYER

Generates structured research results that include market background, key variables, supporting evidence, contrarian information, and major risks.

## VALIDATION LAYER

Completes test commands and records results in historical replay, simulated real-time market conditions, and an internally controlled environment.

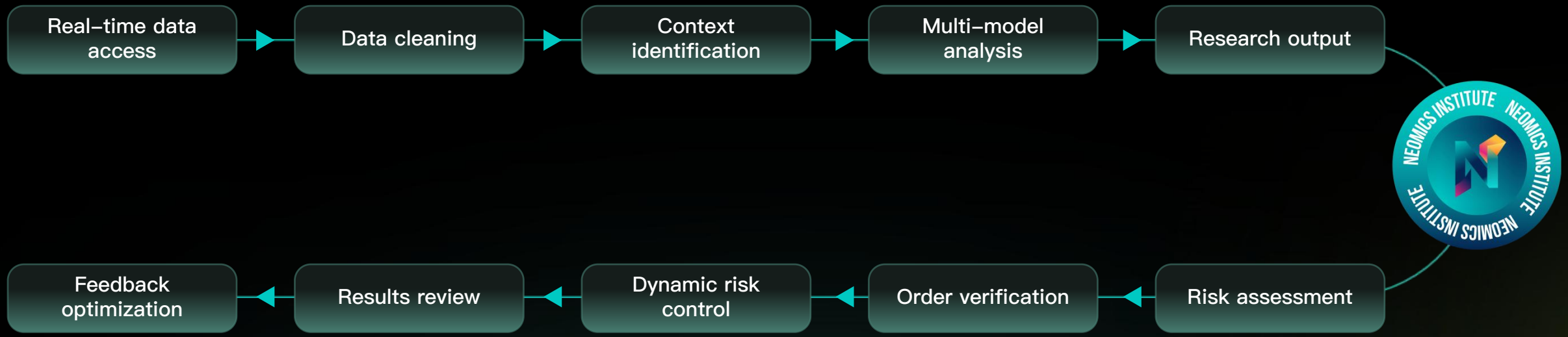
## RISK CONTROL LAYER

Monitors data quality, positions, slippage, drawdowns, and anomalies in real time, and implements restriction, suspension, or termination mechanisms.

# QUANTORA 4.0 COMPLETE WORKFLOW

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Quantora 4.0 employs a ten-step closed-loop logic from information entry to result optimization, connecting data processing, comprehensive analysis, risk review, order verification, and result review into a unified workflow. Each step corresponds to clearly defined tasks and constraints, ensuring that research results not only focus on the conclusions themselves but also emphasize the sources, evidence, execution records, and risk changes.




This workflow enables Quantora 4.0 to form a more complete research chain in a constantly changing market environment, and continuously optimizes data weights, model parameters, and risk control mechanisms through iterative verification.

# QUANTORA 4.0 INTERNAL TESTING PROGRESS

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Quantora 4.0 is currently in internal testing. Testing begins with verification of historical data and knowledge content, focusing on data integrity, classification accuracy, information correlation, and model invocation logic to establish a stable foundation for subsequent testing.

After completing basic verification, the system enters the historical backtesting and simulated real-time market phase to observe analytical performance under different market cycles, trend changes, volatile environments, and event impacts, recording data latency, judgment discrepancies, execution deviations, and risk triggering events.

Only models that meet the internal testing requirements will enter a more rigorous controlled verification environment, where R&D, educational, data, and risk management personnel jointly participate in transaction-by-transaction review and stress testing. All test results are for R&D, education, and system evaluation purposes only and do not represent future performance or constitute any profit guarantee.

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# RISK MANAGEMENT AND VALIDATION PRINCIPLES

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Neomics Institute integrates risk management throughout the entire process of data processing, model analysis, order validation, and results review in Quantora 4.0. The system not only focuses on research results but also checks data quality, model consistency, execution bias, and anomalies, ensuring that the testing process has clear constraints and response mechanisms.



## DATA ANOMALIES → HANDLING

When missing, delayed, duplicate, or conflicting data sources are detected, the system will reduce the data weight, issue a warning, and pause the relevant analysis if necessary.



## RISK EXCEEDINRISK EXCEEDING LIMITS → SUSPENSIONG LIMITS

When slippage, position size, volatility, drawdown, or other risk parameters reach preset ranges, the system can limit the scale, stop adding new orders, or end the test.



## MODEL DISCREPANCIES → REVIEW

When different models make significant differences in their judgments or the confidence level is insufficient, the research results will enter a period of continued observation or manual review.



## TEST RESULTS → REVIEW

Each validation record records the data source, judgment basis, execution status, and risk response, and identifies problems through item-by-item attribution, providing a basis for subsequent model and parameter optimization.

# FUTURE DEVELOPMENT PLAN AND VISION

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In the future, Neomics Institute will continue to prioritize student interests and investment in educational quality, continuously improving digital courses, market case studies, and practical training. It will also optimize knowledge organization based on different learning stages, enhancing the connection between courses and actual market research.




Technologically, the Institute will continue internal testing and feature optimization of Quantora 4.0, focusing on improving data processing, multi-model collaboration, risk alerts, research presentation, and personalized learning support capabilities.

To expedite the development of Quantora 4.0, the Institute plans to offer free online courses, allowing more users with varying learning backgrounds to participate in real-world courses and case studies. Feedback, comprehension difficulties, and functional requirements will be collected during these actual teaching sessions and fed back into the optimization of Quantora 4.0, resulting in:

Free Teaching → Real-world Application → Student Feedback → Feature Optimization → Re-verification

Simultaneously, the Institute will continuously conduct system stability, information security, and necessary compliance assessments, and gradually determine the scope of features and release schedule based on test results, ensuring that Quantora 4.0 more closely aligns with real-world learning and research needs.

## CORE MESSAGE

Prioritize the interests of learners, deepen knowledge through practice, improve tools through feedback, and build capabilities through methods, achieving both knowledge and skills through long-term learning.

# CONNECTING KNOWLEDGE, PRACTICE, AND LONG-TERM LEARNING ABILITY

## CONTINUOUSLY PROMOTING THE SYNERGISTIC DEVELOPMENT OF INVESTMENT EDUCATION AND DIGITAL RESEARCH

Making investment knowledge more systematic and market learning more efficient; prioritizing student interests, using practical experience as the best teaching method, not only giving them fish but also teaching them how to fish.

The Neomics Institute will continue to explore professional education, financial technology, and Quantora, establishing closer connections between knowledge systems, practical training, research methods, technology verification, and risk awareness. The Institute adheres to a student–centered approach, ensuring that knowledge transfer and methodological training go hand in hand, building a more systematic, rational, and long–term valuable foundation for learning and research.

