

UPHOLDING FINANCIAL STABILITY AND ORDER AMIDST CHANGE



FOCUSING ON LONG-TERM VALUE, BRINGING CLARITY, RATIONALITY, AND RESPONSIBILITY BACK TO FINANCE

As the global economic environment undergoes rapid changes and structural restructuring, stability and transparency are becoming the most sought-after qualities in the financial world. Amidst complex information and volatile market sentiment, the demand for security, rules, and sustainability has never diminished. True wealth management is not about chasing noise, but about upholding order, understanding logic, and finding the most stable direction from a long-term perspective.

We firmly believe that a sound financial system relies not only on technology, but also on respect for risk and a responsible attitude towards the future. Clear judgment, structured analysis, and trustworthy mechanisms will build a more mature wealth ecosystem, making every choice more composed and every step forward more grounded. Based on these principles, we hope to embark on a rigorous journey about value, trust, and sustainable growth for every reader.

SLOGAN: TRUST AS THE FOUNDATION, STEADILY ADVANCING VALUE.



Company Background



EverTrust Group Inc., founded in 2020 and registered in Colorado, with its headquarters in New York City, USA, aims to efficiently support its North American and international business development. Against the backdrop of the accelerating evolution of the global financial structure, the company has grown into a professional wealth management institution. From its inception, it has established the core principles of prudence, transparency, and long-termism, committed to providing investors with logically rigorous, clearly structured, and sustainable wealth management solutions. In a complex and volatile market environment, the company adheres to professional judgment and a prudent attitude, gradually forming a highly stable financial service system.



With the deepening of international capital flows, regulatory environments, and digital trends, EverTrust Group Inc. has built a multi-regional, multi-tiered service network covering North America, Europe, and Asia. The company has accumulated rich experience in cross-border asset management and international financial coordination, and based on a rigorous research system, sound risk management standards, and mature strategic logic, it provides long-term solutions that can weather market cycles for clients at different stages and with different needs. The ETG quantitative trading system plays a key role in this process, making strategies more structured, verifiable, and capable of continuous optimization.

The company firmly believes that institutional value is not built on speed, but on the accumulation of systemic capabilities and methodologies. From asset allocation to risk control, from financial education to technology integration, EverTrust Group Inc. consistently refines its systems through practice and elevates standards within those systems, starting with responsibility, following professionalism, and ultimately aiming for long-term value. This continuously deepening internal logic forms the core foundation of the company's steady development and sustained growth.



Corporate Vision

EverTrust Group Inc.'s corporate vision stems from a profound understanding of the future financial structure: wealth management is no longer a point-in-the-box solution, but a holistic system encompassing education, strategy, risk, technology, and long-term support. The company aims to drive the wealth management industry towards a more transparent, intelligent, and value-driven era amidst a constantly evolving global financial environment. We believe a mature financial system must possess a data-driven logical framework, a core value principle of responsibility, and the stability to weather economic cycles.

KEY FOCUS AREAS OF THE CORPORATE VISION:

- **DRIVING THE INTELLIGENT TRANSFORMATION OF WEALTH MANAGEMENT**

Improving the efficiency of analysis, execution, and risk control, centered on the ETG quantitative trading system.

- **CREATING A TRANSPARENT FINANCIAL ECOSYSTEM**

Strengthening tracking, verification, and visualization mechanisms to make the investment process clear and credible.

- **BUILDING A GLOBALLY COLLABORATIVE ASSET MANAGEMENT NETWORK**

Connecting the information and strategy chains across North American, European, and Asian markets.

- **ACHIEVING A UNITY OF LONG-TERM VALUE AND SOCIAL VALUE**

Ensuring that wealth growth and corporate responsibility move forward within the same framework.

Core Philosophy

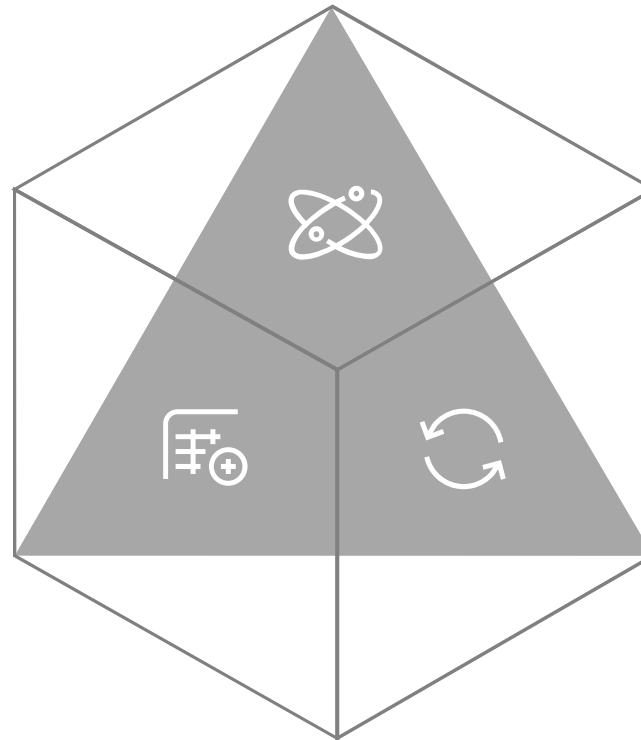


EverTrust Group Inc.'s core philosophy is built upon a profound understanding of the relationship between "long-term, structured, and clear." The company believes that true financial value stems from structured thinking, quantifiable judgment criteria, and a high degree of respect for risk. Every decision, every allocation, and every risk assessment continuously builds a more robust long-term framework. Regardless of market fluctuations, the company always adheres to rationality, transparency, and stability, ensuring that every strategy is logically sound and withstands the test of time.

THE THREE PILLARS OF OUR CORE PHILOSOPHY

RATIONAL PROFESSIONAL JUDGMENT

Rejecting emotions or short-term noise,
adhering to structure and data.



TRANSPARENT EXECUTION SYSTEM

All processes, models, and operations are
traceable, verifiable, and auditable.

STABLE LONG-TERM VALUES

Placing safety, risk control, and sustainable
growth at the core of our strategies.

Core Philosophy



EverTrust Group Inc.'s core philosophy is built upon a profound understanding of the relationship between "long-term, structured, and clear."

The company believes that true financial value stems from structured thinking, quantifiable judgment criteria, and a high degree of respect for risk. Every decision, every allocation, and every risk assessment continuously builds a more robust long-term framework. Regardless of market fluctuations, the company always adheres to rationality, transparency, and stability, ensuring that every strategy is logically sound and withstands the test of time.



01

CROSS-CYCLE RESEARCH CAPABILITY

Deep understanding of the interaction between economic cycles, policy environments, and structural variables.

02

QUANTITATIVE AND TECHNOLOGICAL INTEGRATION CAPABILITY

Supporting strategy development, execution, and monitoring with the ETG quantitative trading system.

03

RISK IDENTIFICATION AND DEFENSE CAPABILITY

Identifying potential stress points from multiple dimensions and establishing defense mechanisms.

04

GLOBAL COLLABORATION CAPABILITY

Connecting North American, European, and Asian markets to achieve cross-regional synergy of strategies and resources.

05

LONG-TERM VALUE ORIENTATION

Adhering to the principles of robustness, transparency, and accountability in all strategies.

Intelligent Investment Technology System



EverTrust Group Inc.'s intelligent investment technology system is centered on the ETG quantitative trading system. It uses algorithms to structure market behavior, identify data patterns, and improve the efficiency and accuracy of strategy execution. The system consists of multi-layered data sources, analytical models, and execution modules, enabling strategies to maintain a stable response mechanism and traceability across different market environments. This architecture makes the analysis process more objective, structured, and logical.



The technology system not only focuses on the model itself but also emphasizes the adaptability between the model and market structure. By continuously tracking price behavior, volatility structure, liquidity changes, and cross-market correlations, the system can continuously adjust parameters and update response strategies in a dynamic environment. This self-regulating mechanism makes strategy execution unaffected by human emotions, improving robustness and consistency.

Furthermore, the intelligent investment technology system emphasizes transparency and interpretability. All data paths, model decisions, and adjustment records can be fully traced back to ensure long-term monitoring and compliance requirements. Through the combination of transparent execution and structured thinking, the company can maintain higher judgment quality and strategy reliability in complex markets.

Risk Management Framework



EverTrust Group Inc.'s risk management framework is based on a complete closed-loop structure of “identification–assessment–protection–verification,” aiming to ensure that any investment activity is conducted in a clear and controllable environment. The company understands that risk does not stem from a single factor, but rather from the combined effects of market structure, macroeconomic variables, and human behavior. Therefore, the framework design emphasizes the dual management of systemic and unsystemic risks.



The risk management process relies on the ETG quantitative trading system, which monitors multi-dimensional market signals in real time to identify potential risk accumulation points and initiates rebalancing or limiting mechanisms in advance when necessary. This proactive identification approach allows the company to build defenses before volatility escalates, rather than passively adjusting after risks materialize. The framework also incorporates stress testing, scenario analysis, and historical regression to ensure the strategy remains resilient across various market scenarios.



At the execution level, the company adheres to transparency and strict discipline. All risk decisions must be verified by quantifiable evidence, and all actions must be clearly documented for auditing and continuous optimization. By combining structured thinking, technological capabilities, and disciplinary management, the company has built a risk defense line capable of supporting robust long-term growth.

Digital Platform Architecture



EverTrust Group Inc.'s digital platform architecture aims to integrate data processing capabilities, intelligent analysis capabilities, and execution stability into a unified system, enabling a highly automated, standardized, and traceable investment process. Starting with data collection, the platform integrates global multi-source data to build a vast database covering macroeconomics, market structure, industry dynamics, and asset behavior, and updates it in real time.

Based on this data, the platform uses an intelligent analysis engine to build logical models, transforming complex market changes into executable, structured signals. The system categorizes and processes different asset classes, market cycles, and volatility characteristics to ensure consistency and interpretability in strategy output. The platform's multi-layered algorithms support self-learning capabilities, allowing it to continuously improve its judgment quality over long-term operation.



The execution module emphasizes transparency and controllability. All instructions undergo multi-level verification and risk filtering before execution, and every step of the process is traceable. The platform creates not only efficiency for investors but also a verifiable, monitorable, and sustainably optimizable operating environment. Through this digital framework, the company can further enhance its robustness and compliance based on technological empowerment.

Main Products and Services



EverTrust Group Inc.'s product and service system is designed around long-term value, structured investment logic, and a robust risk framework, aiming to provide actionable and verifiable solutions for investors at different stages and with different needs. The system encompasses asset management, wealth planning, corporate financial advisory, intelligent investment support tools, and digital asset investment services, forming a sustainably expandable service matrix. By combining professional research, technological capabilities, and compliance standards, the company is committed to ensuring that every strategy has clear logic, robust execution, and a transparent path.

MAIN PRODUCTS AND SERVICES INCLUDE

- **ASSET MANAGEMENT SERVICES**

Covering stocks, bonds, funds, diversified investment portfolios, and digital assets such as cryptocurrencies.

- **WEALTH PLANNING SOLUTIONS**

Including retirement planning, family asset structure planning, and future funding needs analysis.

- **CORPORATE FINANCIAL SERVICES**

Supporting SME financing, capital structure adjustment, cash flow management, and growth strategy development.

- **INTELLIGENT INVESTMENT TOOLS**

Providing data monitoring, strategy assistance, and structured analysis support through the ETG quantitative trading system.

- **CROSS-BORDER INVESTMENT SUPPORT**

Providing investment access and compliance guidance for the US, Canada, Europe, and Asia-Pacific markets.

Cross-Border Asset Allocation Solutions



Cross-border asset allocation is one of EverTrust Group Inc.'s core competencies. The company examines the differences in industry cycles, regional policy environments, and market structures from a global perspective and incorporates these variables into its overall asset allocation framework. By integrating key financial markets in North America, Europe, and Asia, the company builds cross-border investment portfolios for investors that are geographically diversified, effectively mitigate risk, and offer long-term value. This cross-regional structure enables assets to maintain relative stability in a multi-tiered market environment.

In its cross-border allocation practice, the company focuses on key factors affecting long-term returns, such as tax efficiency, market access, currency risk, and the regulatory environment. Through systematic quantitative models and compliance review mechanisms, the company ensures that every allocation has a clear basis and complies with local regulations.

Simultaneously, the company develops multi-tiered asset strategies adaptable to different economic cycles based on client objectives, capital status, and time horizon, ensuring that the allocation logic is both flexible and rigorous.

Furthermore, the company utilizes the ETG quantitative trading system to monitor cross-border markets in real time to capture structural changes and potential inter-regional opportunities. Systematic data processing capabilities help strategies maintain dynamic adjustment capabilities in complex international environments, enabling cross-border allocation to no longer rely on subjective judgment, but to be based on a traceable, verifiable, and cross-cycle operational methodology.

Financial Education and Training System



EverTrust Group Inc. believes that long-term, stable wealth growth requires a mature and rational foundation of financial literacy. Therefore, the company has established a dedicated financial education and training module within its business system. This module combines structured courses, an online learning system, and practical training to help individuals and businesses build independent judgment and deepen their understanding of market structure, risk logic, and asset management methods. This system not only focuses on skills but also aims to improve overall financial literacy and decision-making quality.

THE EDUCATION AND TRAINING SYSTEM INCLUDES

01

BASIC KNOWLEDGE COURSES

Covering core knowledge such as financial fundamentals, risk concepts, and money management.

02

ADVANCED ASSET ALLOCATION TRAINING

Teaching structured methods for long-term investment, cross-asset logic, and portfolio management principles.

03

TAX AND CROSS-BORDER KNOWLEDGE MODULE

Introducing TFSA, RRSP, capital gains mechanisms, and the tax implications of cross-border investment.

04

ONLINE LEARNING PLATFORM

Providing on-demand learning resources, case studies, and simulation exercises.

05

EXCLUSIVE COURSES FOR BUSINESS OWNERS

Focusing on financing planning, cash flow design, and efficient use of corporate funds.

Financial Education and Training System



EverTrust Group Inc.'s global business layout is based on the core principles of "regional complementarity, structural synergy, and steady expansion." The company firmly believes that a cross-regional perspective can significantly enhance the resilience of asset portfolios, enabling investment strategies to maintain greater stability across different economic cycles, policy cycles, and market structures.

Therefore, the company has established an integrated layout around three key regions: North America, Europe, and Asia, ensuring a high degree of coordination between its research system, compliance mechanisms, and investment framework across these markets.

In North America, the company focuses on the mature financial system and institutional advantages, leveraging abundant local market data, regulatory transparency, and a robust securities system to build a long-term asset base for investors. With the United States and Canada as its core, cross-regional asset allocation covers dividend assets, growth assets, multi-market funds, and structured products, providing clients with diversified allocation options that combine stability and growth potential. In Europe, the business is centered in Germany and extends to major EU countries, strengthening asset security and institutional guarantees through a robust market structure and a strong regulatory environment.

In Asia, Singapore serves as a strategic hub, accommodating rapidly growing capital flows and connecting diversified asset classes. This strategic layout not only enhances the company's participation in high-growth markets but also enables it to capture the strategic advantages arising from cross-regional connectivity. The three regions are linked through the ETG quantitative trading system, allowing global strategies to be monitored, fed back, and adjusted within a unified framework, thereby building a truly global asset management network.

Strategic Partnerships and Compliance Custodian System



EverTrust Group Inc. understands that cross-border financial operations must be based on compliance, security, and transparency. Therefore, the company continuously builds strategic partnerships with banking systems, regulated custodians, and research institutions worldwide to ensure that all asset custody, transaction execution, data transfer, and compliance reviews are conducted within a regulatory-approved framework. Through long-term communication with regulatory systems in multiple countries, the company can adapt to policy changes more quickly and enhance the security of cross-border operations.

KEY POINTS OF THE STRATEGIC PARTNERSHIPS AND COMPLIANCE SYSTEM



MULTI-COUNTRY CUSTODIAN PARTNERSHIPS

Provides secure asset custody, transaction clearing, and compliance monitoring.



REGULATORY ALIGNMENT MECHANISMS

Maintains continuous communication with regulatory frameworks in North America, Europe, and Asia.



BANK AND FINANCIAL INSTITUTION COLLABORATION

Supports cross-border capital flows, financing structures, and risk control.



TRANSPARENT COMPLIANCE PROCESSES

Includes transaction records, audit trails, and data verifiability mechanisms.

INDEPENDENT REVIEW AND RISK ASSESSMENT

Regularly undergoes compliance and risk assessments by external institutions.

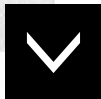
Social Responsibility and Philanthropic Contribution



EverTrust Group Inc. firmly believes that the value of a financial institution lies not only in asset growth but also in its positive contribution to the social fabric. Since its inception, the company has consistently promoted projects related to education, community building, and support for vulnerable groups, fulfilling its corporate social responsibility through concrete actions. This philosophy stems from the company's deeper understanding of the "meaning of wealth": the true value of wealth lies in creating opportunities for development for more people.

In terms of philanthropic contribution, the company focuses on education, youth development, and employability enhancement, funding numerous long-term educational programs to expand financial literacy and vocational skills in more areas. Simultaneously, the company participates in community infrastructure development, medical assistance, and family support projects to alleviate the economic and life burdens on vulnerable groups. These investments not only improve the stability of local residents' lives but also lay the foundation for a healthier economic structure.

EverTrust Group Inc. firmly believes that the essence of finance should be built on responsibility and conscience. An institution's role in society should not be limited to generating profits but should be a force for promoting public welfare, improving social conditions, and fostering equitable development. Looking ahead, the company will continue to expand its investment in social projects, allowing wealth management to transcend mere numbers and truly become a driving force for the shared growth of individuals and communities.



Corporate Governance Structure



EverTrust Group Inc.'s corporate governance structure is centered on transparency, independence, and professionalism, ensuring that all strategic decisions and day-to-day operations are conducted under strict institutional constraints. The company has established a complete governance chain from the board of directors to each business unit through clearly defined responsibilities and institutionalized processes, ensuring that every decision is monitored, verified, and aligned with long-term value.

The governance system not only focuses on the perfection of procedures but also emphasizes the discipline of the execution process. The board of directors is responsible for reviewing strategic direction and major decisions; an independent compliance department ensures that business activities comply with international and local regulatory requirements; and an internal audit system provides regular checks and risk identification, ensuring that operations are conducted in an orderly manner within the framework of procedures and risks. This closed-loop mechanism allows risk management, strategy execution, and business operations to proceed simultaneously within a unified and robust system.

Furthermore, the company implements information transparency and continuous improvement mechanisms to ensure that all decision-making paths, strategy adjustments, and operational data are traceable and auditable. By establishing rigorous reporting systems and verifiable operating procedures, EverTrust Group Inc. has not only strengthened internal controls but also enhanced its credibility with investors, regulators, and partners, enabling the company to maintain robust and professional operations in the global financial environment.





EverTrust Group Inc.'s global team comprises professionals from the fields of finance, economics, technology, law, and quantitative analysis. They provide in-depth insights and rigorous judgment for the company's business development across different regions. The team structure emphasizes the integration of diverse backgrounds, enabling strategies and research to better adapt to the differences in global markets and maintain breadth and depth in cross-regional decision-making. Professional competence and accumulated experience form an important foundation for the team's overall strength.

The company's corporate culture is based on responsibility, professionalism, collaboration, and transparency. The nature of the financial industry requires that every judgment be based on prudence, logic, and respect for risk; therefore, the company regards "accountability for results" as the most important cultural consensus within the team. At the same time, the company emphasizes cross-departmental collaboration, strengthening the team's consistency in execution across different business scenarios through shared systems, unified standards, and open communication mechanisms.

Furthermore, EverTrust Group Inc. focuses on the long-term growth of its talent, enhancing the team's competitiveness in the global market through training systems, professional development paths, and cross-regional exchange opportunities. The company firmly believes that a mature and robust corporate culture strengthens organizational resilience, enabling teams to maintain a clear, stable, and highly professional working style even in complex environments.

GLOBAL TEAM AND CORPORAT E CULTURE



Strategic Vision for the Future



Looking to the future, EverTrust Group Inc. will continue to focus on a robust structure, intelligent technology, and a global footprint to propel its wealth management business to a higher level of professionalism and systematization. Recognizing the ongoing evolution of the financial environment, the company's future plans will prioritize cross-cycle asset strategies, upgrades to its intelligent trading system, and the deepening of multi-regional risk coordination mechanisms to enhance its adaptability and competitiveness in the global market.



Regarding technological development, the company will continue to strengthen the intelligence, transparency, and interpretability of its ETG quantitative trading system, enabling it to play a more central role in market monitoring, strategy construction, and risk identification. As data structures, market behavior patterns, and cross-asset correlations evolve, the company will continue to integrate new technologies to improve the system's dynamic decision-making capabilities and long-term stability.

In the future, the company will dedicate itself to expanding its partner network globally and strengthening its investment in education, community, and financial inclusion, promoting a more mature, robust, and sustainable financial ecosystem. EverTrust Group Inc. believes that the future of finance lies in the combination of structured capabilities, technological transparency, and responsible values, and that the long-term development of institutions will be built on adherence to principles and continuous improvement.

End of Page



In the financial world, stability and innovation are not contradictory, but rather the two driving forces of long-term value. EverTrust Group Inc. consistently adheres to a responsible, professional, and transparent approach to building a traceable, verifiable, and efficient wealth management system. Through a global footprint, intelligent technology platforms, and a mature risk management system, the company not only provides investors with opportunities for robust growth but also drives financial practices towards a more sustainable and resilient direction.

Looking ahead, EverTrust Group Inc. will continue to enhance the intelligence and transparency of its ETG quantitative trading system, optimize cross-regional strategy collaboration, and expand its practices in education, social responsibility, and financial inclusion. The company believes that the true value of wealth management lies not only in digital growth but also in creating a sustainable positive impact on families, businesses, and communities, making finance a force for social progress.

By adhering to a sound strategy, technological innovation, and responsible investment, the company strives to maintain clear judgment and long-term resilience in the complex and ever-changing global market, ensuring that every asset realizes its maximum value within a safe, transparent, and professional framework. EverTrust Group Inc. is committed to enabling every investor to grasp their future wealth and achieve truly sustainable value growth with the support of trust and expertise.





Thank you very much for watching.

EVERTRUST GROUP INC.

