

Meet UMushroom

My very personal investment
strategy



Luba Schoenig & Tonia Zimmermann

Co-Founder of UMushroom Ltd.

Over 2 decades banking experience

Dr. Luba Schönig
Co-Founder

Tonia Zimmermann
Co-Founder



Universität
Zürich^{UZH}



Universität St.Gallen

J.P.Morgan

LEHMAN BROTHERS

Goldman
Sachs

CREDIT SUISSE 

Julius Bär

Agenda

- 🕒 **About UMushroom**
- 🕒 My tips and portfolio

Our Team

Dr. Luba Schönig
Co-Founder

Tonia Zimmermann
Co-Founder



Lea Katunaric
Head marketing



Lou Wehrli
Digital Marketing
Manager



Igor Jovicic
Media expert



Laura Bischofberger
COO



Vladimir Jovicic
Developer



Hein Sweerts de Landas
Tech advisor



Dian Nedelchev
Tech advisor



+ 6 Developers



+ 2 Interns

Money matters

Everybody wants to have a successful life

- 0 Money is essential
- 0 Financial literacy is a precondition
- 0 Investing according to your value is key

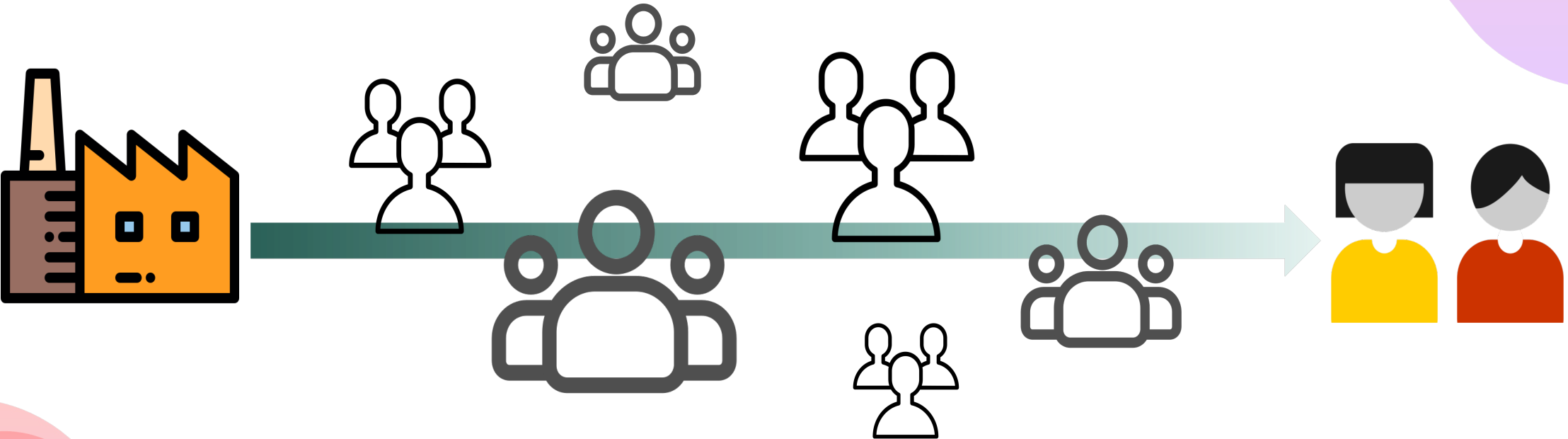
The dilemma around money



The traditional value chain fails



The value chain of investments



Challenges of the pipeline model

- ① Inefficient information flow
- ① Limited generation and maintenance of knowhow
- ① No network effects
- ① Limited scalability
- ① Expensive production processes

A new market place emerges



Platforms are the future

- ① More transparency
- ① Needs are better addressed
- ① Time saving
- ① Empowerment
- ① Shared knowhow is more knowhow



Our vision

We empower everybody to realise their full potential and to live a life in abundance.

**“For investing we are
everything you do
before you click on buy”**

Our solution

Our platform

Investment selection made easy as part of the community.

UMushroom Growth

Learning how to lead an abundant life.

The movement

Know your worth!

Your tools on UMushroom

YOUR GOAL

"SAVE FOR RETIREMENT"

Currency: CHF
 Risk tolerance: 6
 Investment horizon: 10 years
 Initial amount: -
 Monthly amount: 2,000.00
 Target amount: 150,000.00
 Annual target return: 33.3%

RESET

Set your goal

SAVE FOR RETIREMENT | PAY OFF DEBTS | AFFORD EDUCATION
 BUY AN EXPENSIVE ITEM | BUY A NEW HOME | GO ON VACATION

What's your current investing capability?

Taking into account your risk appetite and investment options, let's create a plan for you.

Currency: USD | **CHF** | EUR | GBP

Risk tolerance: 1 | 6 | 10

Investment horizon: 10y | 10y | 40y

over your
ing profile

and skills needed to create an
strategy that works for you!



START

3 Unlock your potential

Grow into the investor you want to be with your personalised roadmap.

UMushroom

WHAT YOUR BANK DOESN'T TELL YOU

PODCAST

What your bank doesn't tell you

UMushroom

FOLLOWING

UMushroom GROWTH Finanzelle Ausbildung

0:00 / 1:35

Modul 1: Das Konzept von Geld und Investieren

Beginner/Techniques

Lass uns dir dabei helfen, der Investor zu werden, der du sein solltest. Sieh dir das Welcome Video an und erfahre, worum es bei der UMU University geht.

WEITER

KURSIHALT

DIE GRUNDLAGEN DES FINANZSYSTEMS 6 Lektionen | 2h 11m

- LEKTION 1: DIE GESCHICHTE DES GELDES 17:12
- LEKTION 2: DIE GESCHICHTE DES GELDES - TEIL 2 19:56
- LEKTION 3: GELD UND DIE VERANTWORTLICHKEITEN 16:33
- LEKTION 4: WIE WIRD GELD KREIERT 25:39
- LEKTION 5: ES GIBT IMMER MEHR GELD 36:00
- LEKTION 6: GELD UND QUANTENPHYSIK 16:30

DAS ANLAGEKLASSEN IM ÜBERBLICK 9 Lektionen

DIE WELT DER ANLAGEINSTRUMENTE 3 Lektionen

DEINE PERSÖNLICHE ROADMAP 5 Lektionen

Tonia Zimmermann 28 Followers

Investor type: **Happy professor**

Motto: *When life hands you lemons, make lemonade.*

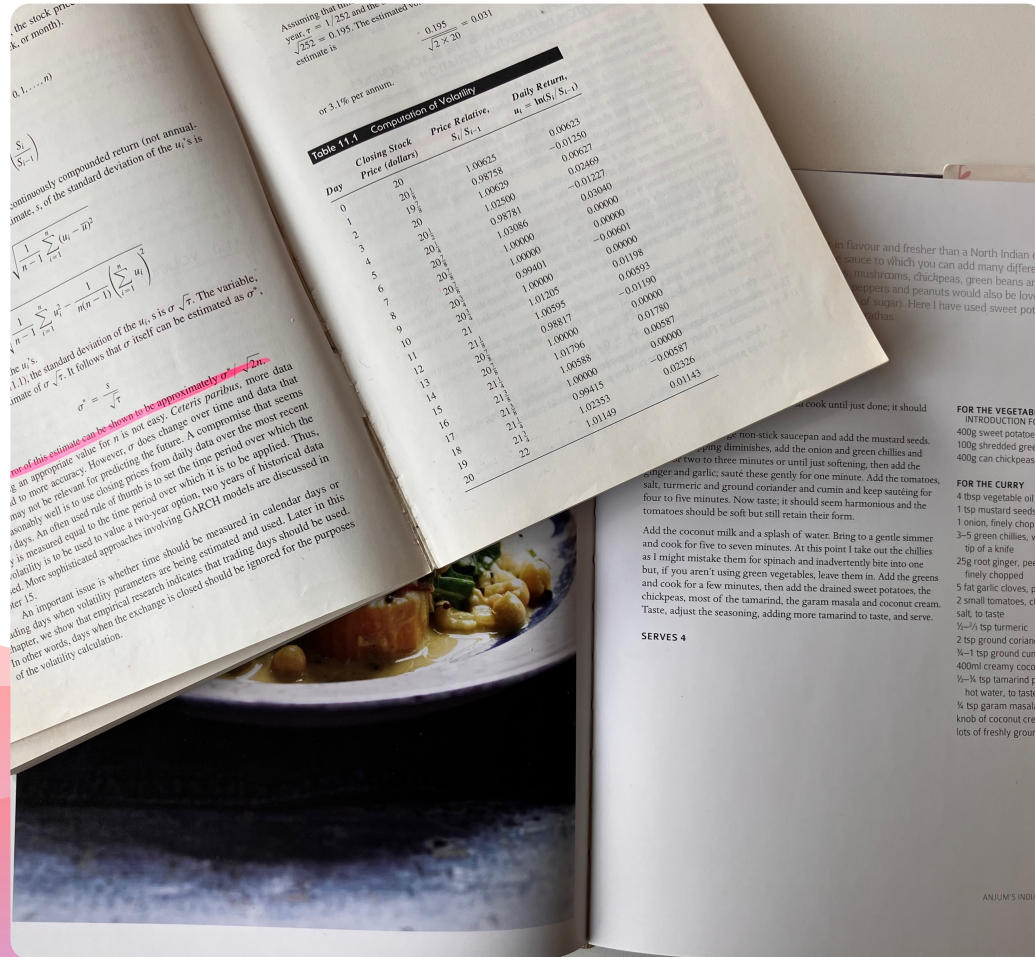
Coins earned: 525

Overall Rating: 4/5

Agenda

- 🕒 About UMushroom
- 🕒 **My tips and portfolio**

#1: You don't learn investing out of books



The screenshot shows the UMushroom app interface. At the top, there's a search bar and navigation links for Home, Investments, My Profile, and Edu. Below this, there's a section for 'Private Markets' with a risk level indicator showing a -0.14% change and a value of EUR 13.88. A 'Risk level' slider is also visible, ranging from 1 to 10. Below the risk level, there's a 'FILTERS (0)' section with a 'RESET' button. The filters include: Trade with our Partners, Umushroom user rating, Research analysts' ratings, Upside potential, Currency, Country, Sector, Market Cap (in USD), and 1Y Performance. At the bottom, there's a list of companies under the heading 'NAME (4,542)'. The companies listed are Nuvei Corporation, ZhongDe Waste Technology AG, LS Telecom AG, Idorsia Ltd, and Aurora Cannabis Inc.

#2: Emotions in trading guarantee frustration



UMushroom Search Home Investments My Profile

Tonia's contest portfolio
By Tonia Zimmermann • CHF • Published 17 Jan 2024
Public + Privacy Setting
+Add keywords

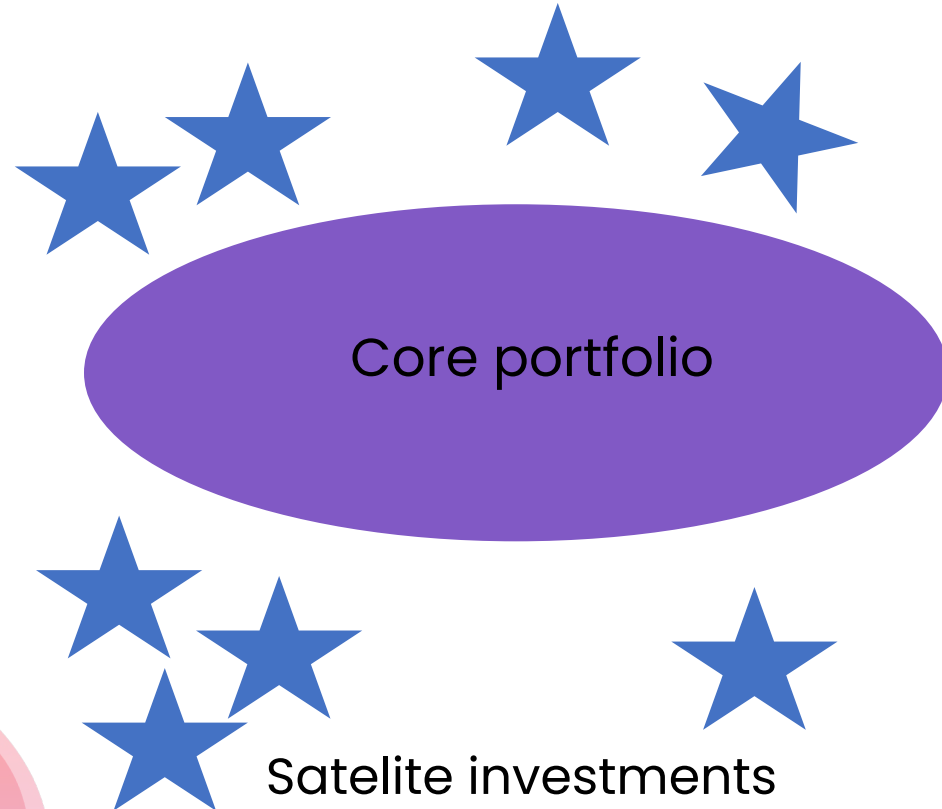
PORTFOLIO - Current value: **CHF 11,196** History

Cash

EQUITIES

Name (3)	Added On	Price	Perfor since
Advanced Micro Devices Inc	2024 Feb 07	USD 190.65	
Novo Nordisk A/S	2024 Feb 07	DKK 914.20	
SIG Group Ltd	2024 Feb 13	CHF 18.85	

#3: Start simple, but start



ETFs

Mutual funds

ETFs

Mutual funds

Stocks

Bonds

Crypto asses

Private markets

Derivatives

#4: Time in the market beats timing the market



#5: There are always opportunities

60mm millionaires (1.1%)

Own 46% of global wealth

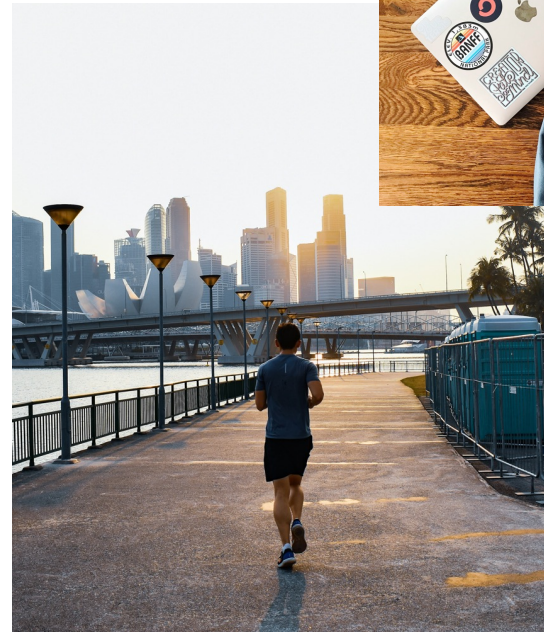
250k UHNWI (USD 50mm)

Increase of 60k individuals over the past 3 years

Trend over the past years

Wealth concentration has been growing

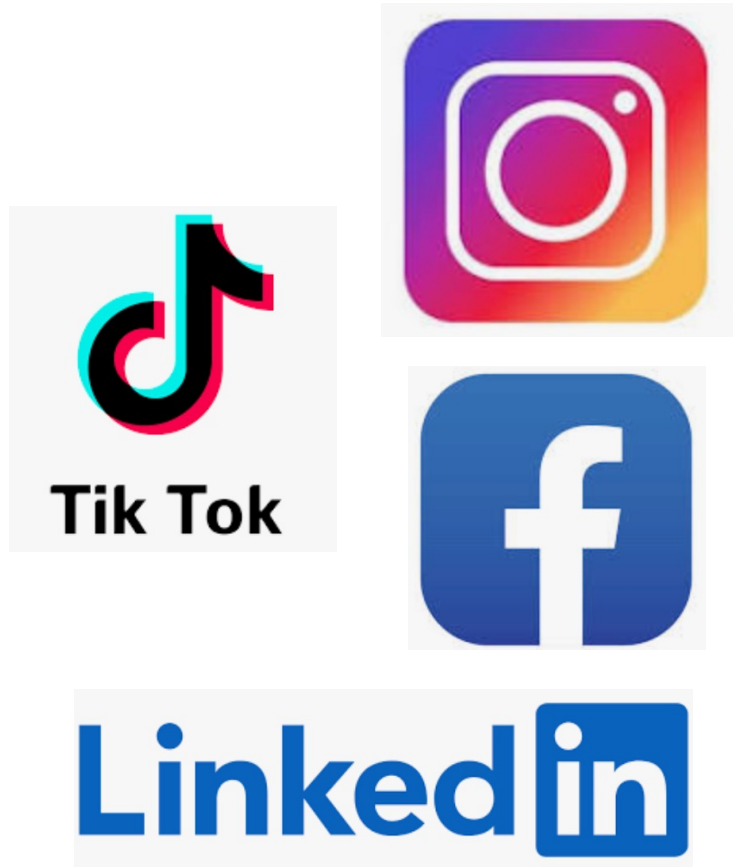
#6: You are invested anyway



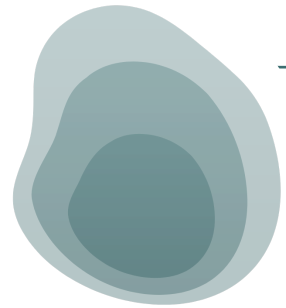
#7: Investing can be exciting



Make investing your new habit



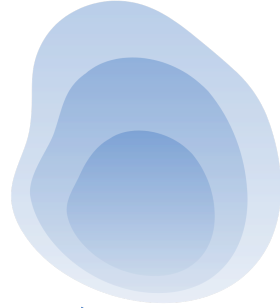
For our individual users



EXPLORE

- 🕒 Top financial information
- 🕒 Portfolio builder
- 🕒 Large investment universe
- 🕒 Voice of the community
- 🕒 Inputs of professionals
- 🕒 Easy to use search engine

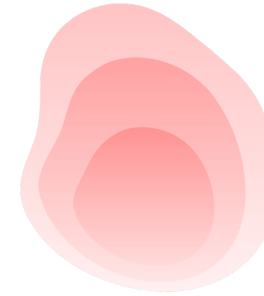
Free



LEARN

- 🕒 All features of Explore
- 🕒 Portfolio builder
- 🕒 Weekly education video
- 🕒 Additional reading material
- 🕒 Badge on UMushroom
- 🕒 Certificate for every module

EUR 9.90 / month



GROW

- 🕒 All features of Learn
- 🕒 Portfolio builder
- 🕒 Weekly webinars
- 🕒 Weekly live FAQ call
- 🕒 We are your sparring partner
- 🕒 Course manual and Worksheets

EUR 249.00 / month

Q&A



Thank you!

#know your worth