



Pitch Deck

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ABOUT US

Cosmic Delineation is a financial analysis site built by investment advisor representatives for investment advisor representatives to build out custom tools for portfolio and market analysis.

2/26/2026

Cosmic Delineation Pitch Deck

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PROBLEM

SOFTWARE TARGETS TRADERS

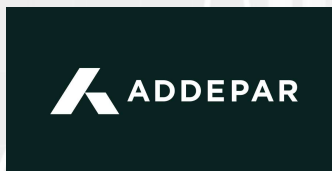
Current analytics software is targeted towards traders and chartered analysts and is limited in relevant tools for investment advisors.

OUTDATED TOOLS DOMINATE

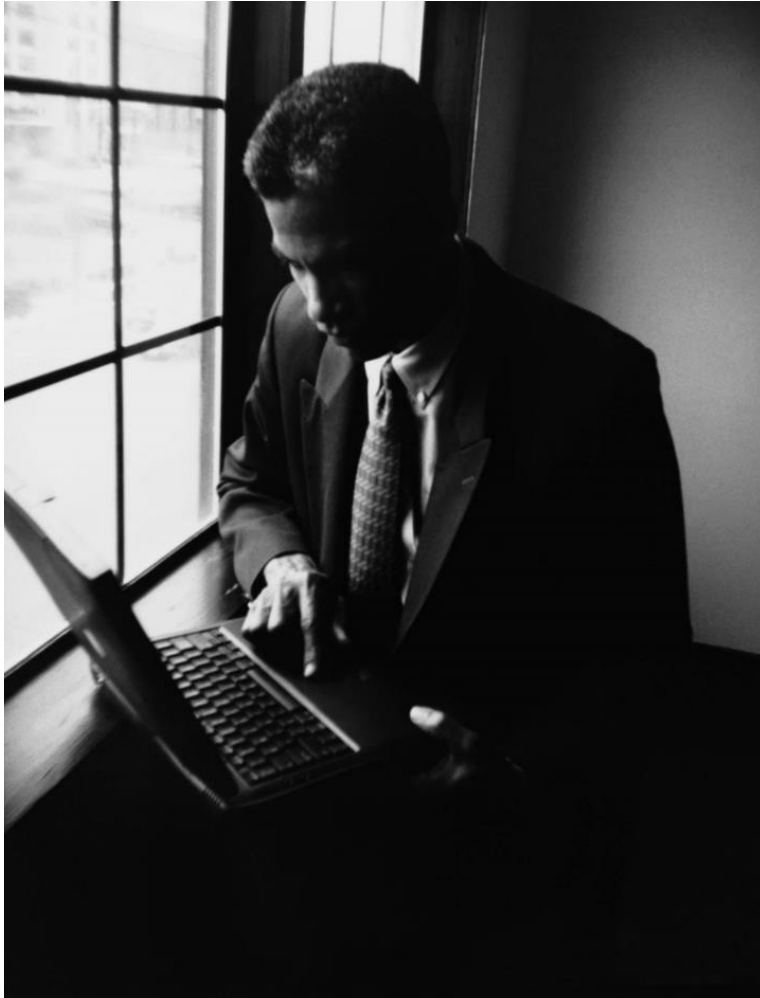
Advisors are left utilizing Excel to run the analysis needed in a way accessible to associates, partners, and clients.

HIGH OPPORTUNITY COST

Time is lost keeping data up-to-date for both current portfolio accuracy and current market analysis.



PROBLEM



SOLUTION

TOOLS TAILORED TO ADVISOR NEEDS

Our product makes understanding your portfolio's efficiency easier, and no other product on the market offers the same niche focus.

TARGET AUDIENCE

Registered Investment Advisors

SALEABLE SOPHISTICATION

Some tools will be built entirely for any advisor to use easily. Others will require advisors to know basic programming skills for more sophisticated analysis.

MARKET WIDTH

Flexible

Opportunity to build
Fully customized tools, or take
Advantage of existing tools

Research

Explore what is going on in the
Market today, yesterday,
Tomorrow!

Design

Test out portfolios or
Compare your allocation to
Your Benchmarks

SEMESTER STRATEGY

FEB 2026

Source Quote Vendors and
Databases

MAR 2026

Roll out First Test Runs of
Correlation Analysis
Applications and Tools

MAY 2026

Launch Website with
Applications Ready to be
Utilized by IARs

ONE-SEMESTER ACTION PLAN

Source Quote Vendors
Feb 2026

Run First Test
March 2026

Fix Bugs
April 2026

2026

JAN

FEB

MAR

APR

MAY

Receive Feedback
April 2026

Website Launch May, 2026

Ambitious Future

If time allows, more advanced tools will be added to the website to meet the needs of investment advisory representatives and partners within network.



MEET THE TEAM



Joseph Martinez
Founder

A detail-oriented financial services professional with Series 65, 7, and 63 licenses and a BA from the University of Texas at Austin. Advanced Excel modeling skills and client-facing experience at both broker/dealers and registered investment advisors. Currently pursuing an MS in Social Data Analytics, enhancing analytical acumen and data reporting capabilities. Eager to contribute to a high-performing, collaborative investment advisory team focused on exceptional client outcomes.





THANK YOU

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