INVESTMENT PLANS AND CRYPTO PORTFOLIO OVERVIEW

CryptoVea

Give your investment a plan.
Track its progress.

From selection and simulation
to tracking value and payouts.



Clear rules. Understandable figures.
Keep the key steps together.

The value of cryptoassets can drop significantly.
The target return is not a guarantee of the result.

SoftVea, s.r.o.

www.cryptovea.com · info@softvea.com · +421 940 404 737

WHY CryptoVea

It is not enough to know that you have deposited money.

You need to see what the deposit belongs to, how the investment is progressing and what the displayed amounts mean.

CryptoVea combines a regular investment setup with fund statements, market data and payout records. You can find the individual steps in your account. From the selection of the plan, you can access its progress and the basis for the completed investment.

Before setting

You will view the available funds, their composition and historical development. In the simulation, you will examine how the selected setting would behave over a given period.

During use

You track the amount invested, the value to the client, the goal and the status of the investment. You also see separate sales and payout steps when exiting.

The plan gives the deposits a specific setting

You choose a fund, a monthly deposit and a target return. You add whether you want to continue or stop regular investing after payment. That way, the parameters won't just stay in your notes.

The overview distinguishes more than one number

The money deposited, the current value, the client's share of the result and the amount sent to the bank have different meanings. CryptoVea displays them in their respective reports so they can be considered separately.

> What the app helps you do
> Go from the plan selection to a specific data: deposit, current result or payout status. You then know which part you need to return to when you have a question.

FUNDS AND THEIR COMPOSITION

See what makes up the selected basket of assets.

Under the designation fund, the application works with a defined composition of crypto assets and their target weights.



Composition has its own rules

The fund determines which underlying assets it includes and how much weight they have in its setup. According to these rules, the distribution of the invested amount is prepared. When assessing the fund, you therefore also monitor its content, not just the name.

The reference currency unifies the comparison

It is the currency in which the relevant fund values and deposit settings are expressed. It helps to compare prices and results on an equal footing. You can also find other parameters of the given fund in detail.

The new plan includes active funds

When setting up regular investing, you choose from currently available active funds. Each selected fund has its own parameters. You can go through individual settings separately.

> ### When you compare two funds
> Review the composition, reference currency and client share rules. That way, you'll find out how their settings differ and what you're actually tracking in each report.

REGULAR INVESTMENT

You set the deposit, goal and further procedure with the plan.

Each selected fund has its own monthly amount and the choice of what should follow after the payout.



Monthly amount according to fund parameters

You enter a deposit in the reference currency and take into account the specified minimum. A schedule of deposits by activation date is also maintained with the plan. In the overview, you can see the dates to which your setting applies.

The target defines the condition for an exit

You specify the desired target return in percentage. This data is used to monitor the fulfillment of the condition for ending the investment cycle. It is not a promised annual interest rate or a confirmation that the goal will be reached by a specific date.

Choose whether to continue after a payout

In the settings, you determine whether the regular investment should end after the payment. You confirm the activation and the application provides payment instructions if your account is approved and the documents are available.

> Setting up a plan is not sending a payment
> You will make the payment according to the instructions provided. The activation of the plan itself does not create a bank transfer or confirm the credit of the deposit.

HISTORY AND SIMULATION

Try the setting on the previous period.

The simulation allows you to explore the selected fund, the start of investing, the monthly deposit and the goal without making a real investment.



You choose the beginning in the historical course

For the fund, you open its development and set the start of the simulation. After entering the parameters, you can see the model of regular deposits and the calculated course for the selected period.

Assess both the inputs and the outcome of the model

The report shows the amount invested, the value to the client and whether the goal was achieved in the simulated period. You can explore a different variant when changing the start or setting.

Historical performance and a client's return are different measures

The performance of the fund is based on the prices of its underlying assets and set weights. The result for the client also takes into account the client's share. Therefore, it is necessary to read the name and the meaning of the specific displayed value.

> Simulation explains the past
> It is not a prediction or promise of future returns. Future prices, costs and trade execution options may differ from the past.

ACCOUNT AND TILE OVERVIEW

You organize the essential data as you wish.

View selected reports on your desktop, resize them, and save your layout.

Someone wants to see the investments first when opening an account. Another also tracks the prices of specific cryptocurrencies. Tiles allow you to prepare your own view and return to it for future use.

Overview	What are you watching in it?
Account status	The invested amount, the value to the client, the result and the status of the investment.
Cryptocurrency price and chart	Selected cryptocurrency and available price history.
Fund price and chart	Development of the selected fund in the reference currency.
Price table	Multiple selected cryptocurrencies side by side.
Calculator	Value conversion between selected assets.
External portfolio	Data from supported exchanges via a read connection.

The layout will remain ready

You can move the tiles, change their dimensions and, if possible, also choose the displayed data. You save your custom layout and load it later. Therefore, you don't have to put together the same look every time.

The target remains separate from the current value

When checking the investment, it is possible to distinguish how much you have invested, what is currently working out for the client and what goal is set. The target is the limit of the monitored result, not today's balance.

> ### An example of your own view
> Next to the account status, you can open a graph of the selected fund and the price of the assets you are following. You can then assess more related data on one surface.

MARKET DATA AND CALCULATOR

You can view and recalculate the exchange rate.

With cryptocurrencies, quantity is not enough. It is important to know against which currency and at what time the value is expressed.

Price and progress

You select an asset and an available chart period. You can also view the buy and sell quote according to the report.

Value conversion

Enter the quantity, source asset, target asset and reference currency in the calculator. The result also shows the exchange rate used and its update time.

The purchase price and the sale price do not have to be the same

The Ask and Bid symbols represent offers to sell and buy. The difference between them is one of the contexts that must be taken into account when reading the market price. The graph shows the development in the selected period.

Use the calculator to compare asset quantities

You can recalculate what the value of the second asset corresponds to the specified quantity at the available exchange rate. The conversion path used via the market or reference currency is also displayed.

Note the result	Why is the data important?
Reference currency	Specifies the basis against which you are comparing values.
Update time	It shows the moment at which the rate was obtained.
Price and resulting quantity	It distinguishes the unit exchange rate from the converted amount.

> The conversion does not execute the trade
> A calculator is an analytical tool. The result of the calculation itself does not mean buying, selling or booking the displayed price.

EXTERNAL PORTFOLIO

See also balances on supported exchanges.

The External wallet tile can load data via read-only connections.



Custom connections to exchanges

You can prepare up to five connections in one tile according to currently supported exchanges. You select the exchange and fill in the necessary access data. You will then see your available balance and its conversion.

Read access means tracking data

When creating the key on the exchange, read permissions are used. Trading and withdrawals are not enabled for this report. The external connection is for overview, not for entering instructions through this tile.

You can also see the last sync

Once loaded, you have update information and can request a refresh. You assess the balances from the external connection as a separate view of the given exchange, separately from the investment plan CryptoVea.

> ### A practical advantage
> With your account, you can also view data from supported external accounts. When preparing the connection, we will help you navigate the required authorizations.

CUSTOMER DATA AND VERIFICATION

Before activation, the account has its own verification process.

Investment settings and payment instructions are made available after verification and approval of the account according to the rules of the service.

Registration creates an account. The subsequent verification will supplement the documents about the client and his bank details. In the application, you can see whether something needs to be added, whether the verification is in progress or has already been approved.

Area	What documents are dealt with in it
Identity	Document details and required documents.
Address	Basis for address verification according to account requirements.
Bank details	Bank account details and relevant confirmation.
Company account	Additional company information and documents, if relevant to you.
Verification progress	Proceeding through the verification service and subsequent account status.

You have the requirements divided by areas

You complete the documents in the relevant parts of the verification. The app will show missing items and allow you to save your documents before continuing. For external verification, it can provide a link or QR code for the phone.

Approval can be distinguished from verification in progress

Saving documents does not necessarily mean an approved account. You can find the current status in the verification module. Once approved, you can proceed to the available investment settings.

> More transparent even when filling
> If something is missing, you will return to a specific area. You do not have to guess whether all the necessary documents have already been submitted.

ACCOUNT AND EVENT ACCESS

Also look at what's going on with the account.

Logging in, setting changes, and authentication have their own security features and records.



Login with verification code

With standard login, you work with the password and code sent to your e-mail. The application also has other access settings according to the selected mode. You manage your personal settings with your account.

You can look back on important events

In the Events module, you can find records related to your account, such as authentication, document storage, or access changes. You can filter the overview by day or month.

An understandable environment according to your needs

You set the look and language of the interface. Reports and open windows can be adapted to the way of work. With sensitive data, it is important to distinguish your own account from operator functions.

> ### When you need to review a change
> In events, you will see the type of record and its date. This will help, for example, when asking when new documents have been saved or when the verification status has changed.

ACHIEVING THE GOAL AND ENDING THE CYCLE

Reaching the goal starts the next procedure.

When the specified condition occurs, the system handles the sale of the assigned assets and the subsequent preparation of the payout.



The goal is pursued with a specific investment

Take profit is a rule for output when a set client result is achieved. An active cycle has its own goal. The possibility of its modification also depends on whether the termination has already started.

The sale has its own course

The system prepares and processes the sale of the respective crypto-assets. The resulting amount is based on the actual trades. Therefore, the value when the output is started may not be the same as the amount after it is completed.

Transfers take place before the client receives a payout

The current procedure includes the transfer of funds from the stock exchange and confirmation of credit to the company account. Only then can the payment to the client be moved to the ready state for further processing.

> What does goal achieved mean?
> It is the trigger of the process. It does not mean that the money has already arrived in the client's bank account. The payment status is monitored separately.

PAYOUT HISTORY AND STATUS

You can see what stage the payment is in.

The timeline distinguishes goal achievement, sales, transfers, and completed client payouts.

Step	Which in summary means
Goal achieved	The monitored condition has been met and termination has begun.
Assets sold	The assigned assets have been sold.
Exchange transfer completed	Completion of the relevant transfer is registered.
Corporate attribution confirmed	The receipt of funds to the company account has been confirmed.
Payment ready	The client transfer can continue with the next step.
Payment sent	The sending of the payment to the client is registered.
Payment completed	The process has recorded a confirmed completion.

You can also find dates for the steps

A timeline will help distinguish the steps that have already been taken from those that are still pending. When asking about the progress of the payment, you can rely on the specific status, not only on the resulting amount.

The amount to the bank has a separate display

When the investment is completed, you can see the principal, client income, gross claim, processing fee and the amount to the bank. The masked target account number is also displayed.

> ### Ready, Submitted, and Completed are different states
> The payment ready for processing is not yet a confirmed credit with the client. Use a specific status from the timeline when checking.

SIGNIFICANCE OF THE SHOWN AMOUNTS

Deposit, result and payout are not one amount.

Distinguishing individual values will help to understand what has already been deposited, what is calculated and what is actually paid out.

Concept	How to read it
Deposited / principal	Recorded amount of contributions to the relevant investment.
The result of the underlying assets	A difference based on their value or realization.
Client's share of the result	Part of the result according to the set model for the client.
Value for the client	Deposit supplemented by calculated client result.
Target	The limit of the observed result for starting the output.
Gross claim and fee	Separate line items in the payout statement.
Amount to the bank	Amount intended for client bank transfer.

Fund performance is not the same as a client's total return

The displayed client result depends on the set share. Therefore, when comparing, note whether you are following a fund curve or a client report. The same percentage in two different parts may not mean the same thing.

Displaying a loss does not guarantee it will be limited

The client report applies the set model even with a negative result. The displayed value should be read together with the terms and conditions and realized status. The method of calculation in the application itself is not a protection against the loss of capital.

> ### Check the fees before activation
> Check client share rules and current fees for a specific product. The gross claim, the fee and the amount to the bank can then be distinguished in the payment history.

BEHIND THE CLIENT VIEW

Behind the client overview is a record of individual steps.

The operator works with client documents, deposits, business events and records reconciliation.



Deposit needs proper assignment

Payment instructions contain the data necessary to identify the payment. During processing, the deposit is assigned to the client and the relevant investment setup. Therefore, the correct payment reference is also important.

Automation has recorded results

When trading, records of orders and executions are kept. Operations modules show runs, events, and processing errors. Incomplete or inconsistent cases can be searched and reviewed.

Client and operator have different data scope

The client tracks his own investment and payouts. The operator has separate tools for client management, registration and data comparison. Controls can help capture differences between different parts of the process.

> ### Practical meaning when asking for support
> You can specify a specific fund, deposit or payout status. Support can then start from the relevant records and check what happened in that step.

BEFORE PLAN ACTIVATION

First understand. Then decide.

Go through the features of the application and the terms of the specific service. A good overview should show the possibilities as well as the limits.

What to clarify	Where to start
Composition and rules	Detail of the selected fund and its conditions.
Client share and costs	Result calculation rules and current fees.
Past progress	History and simulation with different beginnings.
Verification and Payments	Account status and payment instructions after approval.
Output and payout	Termination Conditions and Client Transfer Steps.

The value can fluctuate significantly

Cryptoassets can go up and down quickly, and you can lose your entire investment. With limited liquidity, it may not be possible to sell at the desired price or at the desired time.

Neither regularity nor target eliminate risk

Spreading deposits over time and setting an exit condition are part of the rules. They do not guarantee profit, goal achievement or payment date. Simulation and historical performance are not predictive of future outcome.

You can start by familiarizing yourself with the application

You will view the available funds and the simulation. If you decide to continue, you will create an account, fill in the necessary documents and go through verification. You can access the investment settings after approval.

> This leaflet introduces the features of the CryptoVea
> It is not a personal investment recommendation or a promise of return. Before making a decision, read the terms and conditions of a specific service and verify its provider.

General crypto-asset risks: warning from ESMA and the European supervisory authorities dated 6 October 2025. | View source

LET'S CONNECT

Let's go through CryptoVea on a concrete example.

We'll show you how the plan, reports and individual investment statuses relate to each other.



Want to explore the options?

We'll go over available funds, simulation, and our own report layout. We will explain where to find the deposited amount, client result and payout progress.

Have a question about the procedure?

We will look at account verification, payment documents or the meaning of a specific status. When reviewing the external portfolio, we will also go over reading connections.

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