VEKTOR

BY

INVESTPUPPY

The First 90 Days

For Proof Partners — provided at mandate signing

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But here’s how we’ll approach it.

The honest reason we don’t know is that your practice is not the same as every other practice.

Your investable universe is different. Your client profiles are different. Your workflow — the way decisions actually get made on a Tuesday morning — is different from how any other DPM describes theirs.

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1. WEEK ONE

Before we build anything.

In week one, our CEO and our CTO are in your office. In person. Not on a call, not reviewing documentation remotely — in your office, working alongside you.

We are not configuring anything. We are watching, listening, and learning.

What does your screening process actually look like? Where does the manual work happen? What takes longer than it should? What works well that you would not want disrupted? What have previous technology projects failed to understand about how you operate?

By the end of the week we will have a clear picture of your practice — not a theoretical model of it, but the real one. That picture shapes everything that follows.

INTEGRATION TOUCHPOINTS

Week one also identifies every integration point the implementation will touch. Data integration is not a marginal consideration and not an afterthought — it is fundamental to the success of the process, and the place where most platform adoptions quietly accumulate the failures that surface in week six.

Two directions, both mapped in week one:

— Inbound: market data. What data sources does your practice currently use? What quality standard do you require? What format? What needs to be configured, connected, or replaced?

— Outbound: order and allocation output. How does the Vektor position file reach your PMS, your execution system, your broker? What format, what protocol, what testing is required before go-live?

— Data residency. Where client data and mandate data will be held is a contractual question, not just a technical one. Vektor's default deployment is AWS ap-southeast-1 (Singapore). For Proof Partners with Swiss regulatory requirements, UK data residency requirements, or other jurisdictional constraints, regional deployment (eu-west-2 for UK/EU, eu-central-1 for Switzerland) is contractually specifiable and written into the Data Processing Agreement at signing. Week one confirms the correct region before any configuration begins.

THE UNKNOWNS REGISTER

Every implementation surfaces things neither party anticipated. The unknowns register is our explicit acknowledgment of what we do not yet know how to resolve — workflow gaps, integration edge cases, role configurations that need adaptation, timing constraints specific to your client base.

We document them honestly. We agree on them together. We build a plan to convert each unknown to a solution. The unknowns register is not a risk log to be reviewed in six months. It is the agenda for the weeks that follow.

2. THEN WE BUILD THE PLAN

Only after week one.

Most software adoptions work the other way around. The vendor hands you a plan at signing — before they have met your team, observed your workflow, or identified a single unknown. That plan reflects what they know, not what you need.

The plan we build at the end of week one is different. It is built from what we learned about your practice. It covers timelines, client conversion sequencing, parallel running, integration milestones, and the go-live milestone — defined for your workflow specifically, not for a generic DPM practice.

By the time we build it, both parties have a week of shared knowledge, a fully agreed unknowns register, and a documented integration map. You know more about how we work. We know more about how you work. The plan that emerges is one both sides can commit to with confidence — because it was built from understanding, not assumption.

3. WHAT COMES NEXT

Every plan will be specific to the practice. These are the phases it will address.

CONFIGURATION

The platform configured around your actual instruments, benchmark, clients' base currencies, and team role structure — informed by what was learned in week one. A note on roles: Vektor separates the Analyst, Portfolio Manager, and Operations functions. In a boutique practice these are often one or two people. The platform accommodates this. The configuration will reflect how your team actually works.

FIRST STRATEGY BUILD

Your Analyst builds the first strategy on your instruments. The grid search runs across six indicators for every holding. The efficient frontier is generated from 10,000 portfolio configurations. The Portfolio Manager reviews the complete output — instruments, weights, signals, Sharpe ratios — before approving anything.

This is the moment the platform stops being a proposition and becomes a tool. Some of what it produces will match your current process. Some will not. Both outcomes are useful. Agreement builds confidence. Disagreement starts the most valuable conversation of the implementation — why does the systematic process see this differently? The answer is always in the data.

PARALLEL RUNNING

Vektor produces recommendations. Your PM evaluates them. Your existing process continues alongside. This phase is confidence-dependent, not time-dependent. It ends when the Portfolio Manager has reviewed enough Vektor recommendations to be satisfied they are ready to execute with real capital. We will not set a calendar deadline for this. We will work with you until the confidence is genuinely there.

FIRST LIVE EXECUTION

One strategy. One client. One mandate. The eleven steps, end to end, with real capital, for the first time. Everything visible, everything logged, everything approved before a single order is placed. This is the milestone — not the end of anything, but the beginning of the operating relationship.

4. THE FOUNDING RELATIONSHIP

Co-builder. Not consumer.

The founding partner is not a beta tester and not simply a first customer. They are a co-author of the production system. Every defect they identify is a contribution. Every fix they validate is a joint decision. Every release they test before general availability is the founding partnership working as it was designed.

InvestPuppy gets what no amount of internal testing can provide: a live workflow, real capital, and practitioners who know what correct output looks like. The founding partner gets a platform built around their specific practice, fixed when it fails, and improved by their direct input. Neither party is doing the other a favour. This is what founding means.

HOW DEFECTS, FIXES AND RELEASES WORK

Defect management is not an external process. It is built into every step of the implementation and the operating relationship that follows.

— Critical defects affecting live execution reach us directly — no ticket queue, no triage, no escalation path. Timeline agreed within hours, not days.

— Non-critical defects are tracked in the unknowns register and addressed on the agreed release schedule.

— The founding partner validates every fix before it goes to production.

— Every new capability reaches the founding partner before general release. They validate it against their workflow before anyone else sees it.

This is not optional. It is the process.

The developer will be dedicated to resolving defects.

The CEO will be driving the developer.

The CTO will BE the developer.

5. WHAT WE COMMIT TO

Throughout the ninety-day period and the founding relationship beyond it.

We will tell you what is not yet built before it becomes a problem. If a capability you need is on the roadmap rather than live today, you will know before it affects the plan — not during the week you needed it.

The Founders are your direct contacts. Not an onboarding manager. Not a customer success function.

The people who built the platform, available to you for questions about methodology, workflow, integration, and anything the implementation surfaces. In person in week one. Directly reachable throughout.

Integration is treated as fundamental. Not a marginal consideration. Not an afterthought. Integration touchpoints are identified in week one, planned in the implementation plan, and tracked through to completion.

The unknowns register is maintained. Every item identified in week one is tracked to resolution. New unknowns that emerge during configuration or parallel running are added. Nothing disappears because it is inconvenient.

Implementation commitments are kept. The timelines in the plan built at the end of week one are treated as commitments, not estimates. If something changes, we tell you immediately and we tell you why.

6. THE HONEST VERSION OF WHAT IS HARD

Three things to expect.

The first strategy build is not the final one. The PM's review will identify adjustments — instruments that should not be in the universe for reasons the screening did not capture, constraints that need tightening, a benchmark weighting that needs refinement. This is not a failure. It is the calibration working correctly. Expect to rebuild the first strategy at least once.

Parallel running requires discipline. The temptation to run for two weeks and go live is real. The value of parallel running comes from evaluating the platform's output across multiple market conditions and multiple strategy cycles — not from checking it once and feeling ready. We will recommend the right duration. We will not enforce it.

Your team's workflow will change. The Analyst's role expands. The PM's role shifts. The Operations function acquires new responsibilities. None of these changes are difficult. All of them are different from what your team does today. Budget time for the adjustment.

The first Proof Partner is not receiving a proven process. They are participating in the first real-world execution of one — alongside the people who designed it, who will be there in person from day one, and who will be fixing it when it needs fixing.

We do not know exactly what your first ninety days will look like. We know precisely how we will approach them.

Show us a mandate. The ninety days start there.

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investpuppy.com · contact@investpuppy.com