



**NEPTUNE**

Digital Assets Corp.

---

THE FUTURE OF  
CRYPTOCURRENCY

TSX-V: NDA • OTCQB: NPPTF • FSE: 1NW

# FORWARD LOOKING STATEMENTS & DISCLAIMER

---

This document is confidential and is being provided to you solely for your information and may not be reproduced, in whole or in part, in any form or forwarded or further distributed to any other person. Any forwarding, distribution or reproduction of this document in whole or in part is unauthorized. By accepting and reviewing this document, you acknowledge and agree (i) to maintain the confidentiality of this document and the information contained herein, (ii) to protect such information in the same manner you protect your own confidential information, which shall be at least a reasonable standard of care and (iii) to not utilize any of the information contained herein except to assist with your evaluation of the company.

This presentation is subject to change without notice and is directed solely to accredited investors and other eligible investors, prospective dealers, institutional brokers and other professional clients. The presentation is not directed at, and may not be suitable for, and should not be relied on by, general retail clients.

While we believe the information provided herein is reliable, as of the date hereof, neither Neptune Digital Assets Corp. (“Neptune”) nor any of its directors, officers, employees, agents or consultants (i) makes any representation or warranty as to the accuracy or completeness of the information contained in this document, (ii) undertakes any obligation to update any information contained herein, except to the extent required by applicable law, or (iii) takes any responsibility under any circumstances for any loss or damage suffered as a result of any omission, inadequacy, or inaccuracy in this document, except to the extent required by applicable law. The following presentation is intended as a summary only, contains selected information and does not purport to be all-inclusive or to contain all of the information that may be relevant to a decision to invest in our securities. You should not rely upon this presentation in evaluating the merits of investing in Neptune. Any decision with respect to an investment in Neptune should be made based solely upon appropriate examination of our business. This document is intended for those with an in-depth understanding of the high risk nature of alternative investments and these investments may not be suitable for you. This document may not be distributed in either excerpts or in its entirety beyond its intended audience and Neptune will not be held responsible if this document is used or is distributed beyond its initial recipient or if it is used for any unintended purpose. This document is not a solicitation for an order, and there is not enough information contained in this document in which to make an investment decision and any information contained herein should not be used as a basis for this purpose.

Neptune is a publicly traded corporation on the TSX Venture Exchange under the ticker “NDA.” There are substantial risks in investing in Neptune. Investors must have the financial ability, sophistication/experience and willingness to bear the risks of an investment. An investment in Neptune is not suitable for all investors.

The following presentation contains statements, estimates, forecasts and projections with respect to future performance and events, which may constitute forward-looking information (“FLI”) within the meaning of National Instrument 51-102 Continuous Disclosure Obligations (“NI 51-102”). This FLI includes statements regarding the intent and belief or current expectations of Neptune and its affiliates and subsidiaries and their respective management teams. These statements may be identified by the use of words like “anticipate”, “believe”, “estimate”, “expect”, “intend”, “may”, “plan”, “will”, “should”, “seek” and similar expressions and include any financial projections, estimates, pro forma financial information or future-oriented financial information set forth herein. Prospective investors are cautioned that any such FLI are not guarantees of future performance and involve risks and uncertainties, and that actual results may differ materially from those projected.

**Market Research and Public Data:** This presentation also contains or references certain market, industry and peer group data which is based upon information from independent industry publications, market research, analyst reports and surveys and other publicly available sources. Although we believe these sources to be generally reliable, such information is subject to interpretation and cannot be verified with complete certainty due to limits on the availability and reliability of raw data, the voluntary nature of the data gathering process and other inherent limitations and uncertainties. We have not independently verified any of the data from third party sources referred to in this presentation and accordingly, the accuracy and completeness of such data is not guaranteed.

# EXECUTIVE SUMMARY



Neptune is one of the first public blockchain companies listed on the TSX-V in early 2018

Generating revenue through Bitcoin mining, staking, blockchain nodes, and DeFi

Investors gain exposure to a diversified portfolio of income generating digital assets

Well capitalized, low operating cost entity positioned for growth in the next bull cycle



# OUR MISSION:

Neptune aims to have the deepest understanding of cryptocurrency and translate that into high yield assets.

# MILESTONE HIGHLIGHTS

Continually expanding our footprint in cryptocurrency



## First blockchain node

Neptune built and launched its first Dash masternodes

## First validator

Neptune built and launched its first ATOM validator

## Bitcoin Mining

Starts Bitcoin mining in North America

## Staking

Expanded staking with SOL, DOT, GRT

2017

2018

2019

2020

2021

2022

2023

## Neptune goes public

Neptune becomes one of the 1st public cryptocurrency companies in Canada

## Diversification

Neptune focuses on diversification of assets

## TSXV top 50

Launched an Ethereum Validator

# BUSINESS MODEL



**Bitcoin Mining**

*"Proof of Work Network  
Trust and Security"*

**Cryptocurrency Staking**

*"Proof of Stake Network  
Trust and Security"*

**Operating Blockchain Nodes**

*"Validating Transactions"*

**Decentralized Finance**

*"Yield Farming"*

Crypto earnings are reinvested, compounding growth



# BITCOIN MINING

200 S19 Pro 110TH deployed

530 S19 Pro 100TH deployed

We host in continental USA with a mix of renewable and other power sources

\$0.075 per kwh for power, hosting, and operations through a strong partner network

At current Bitcoin network difficulty, 75 PH should generate ~5 Bitcoin/month

# Bitcoin Halving 2012-2024

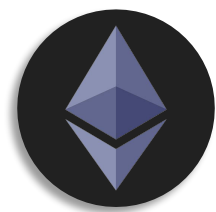




# Yield Generating Business



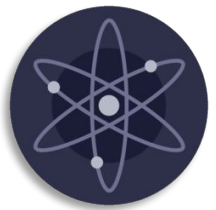
Neptune operates blockchain infrastructure which generates yield on our asset base



Ethereum = Operating a validator



DOT = Delegated to a validator



Cosmos = delegated to a validator



SOL = Delegated to a validator

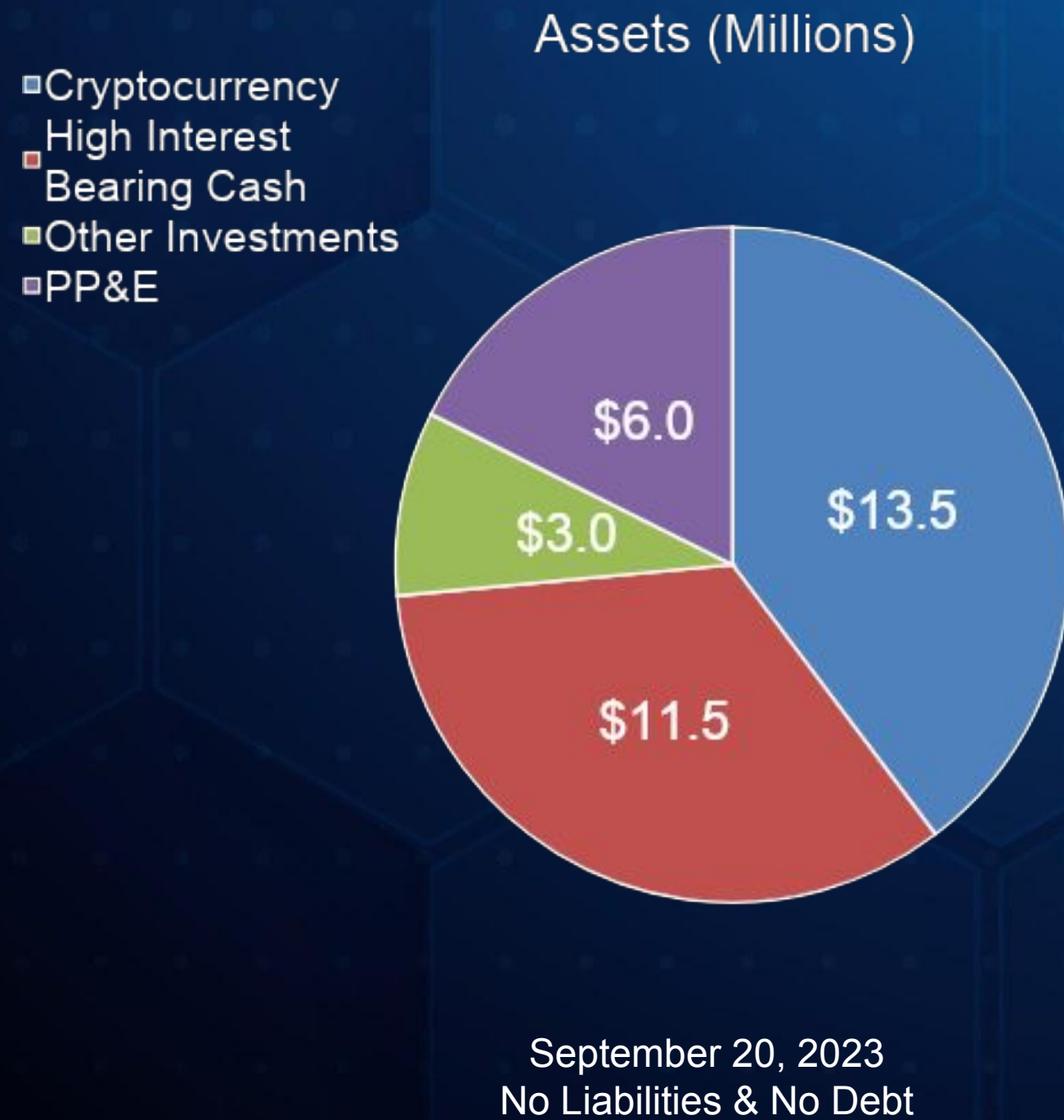


Dash = Operating Masternodes



GRT = Accumulation phase, to be eventually staked

# Assets and Opportunity





# WHY NEPTUNE?

A simple way to get diversified  
cryptocurrency exposure

Avoid dilutive financings, 10+ years of  
runway

Positive crypto flow, with a strong  
balance sheet

Early entry before next halving date and  
eventual bull cycle

# CAPITAL STRUCTURE

Total shares outstanding : 125.5 M  
Warrants outstanding\* : 20.8 M (~\$1.70)

Options: 12.5 M

Fully diluted: 158.8 M

NAV: \$34 M

As of September 20, 2023

\* 100% of warrants expire April 2024

Institutional & Strategic  
Investors  
10%

Management  
20%

Retail Investors  
70%

Approximate Ownership



# MANAGEMENT AND BOARD



**Cale Moodie, CPA, CA**  
*CEO & Director*

Entrepreneur and CPA with 15 years in executive roles in public markets, over \$200M raised, cryptocurrency background since 2013.



**Kalle Radage, MBA**  
*COO, Director*

Entrepreneur with deep experience in software, financial technology, and payments: Oracle, Nokia, Payfirma.



**Carmen To, CPA, CA**  
*CFO & Director*

CPA, CA, and previously worked at KPMG LLP in audit and now works on both private and public company clients.



**Mitch Demeter**  
*Independent Director*

Previously President of Netcoins, a subsidiary of BIGG Digital, a cryptocurrency exchange in Canada.



**Dario Meli**  
*Independent Director*

High tech entrepreneur and founder of Hootsuite, Quietly Media, Invoke Media, and Foodee.



**Dustin Zinger**  
*Investor Relations*

Since 2017, Dustin has been actively involved in the cryptocurrency and blockchain space, helping investors bridge the gap between traditional public markets and digital assets.



# THE FUTURE OF CRYPTOCURRENCY

[info@neptunedigitalassets.com](mailto:info@neptunedigitalassets.com)

[www.neptunedigitalassets.com](http://www.neptunedigitalassets.com)

1-800-545-0941