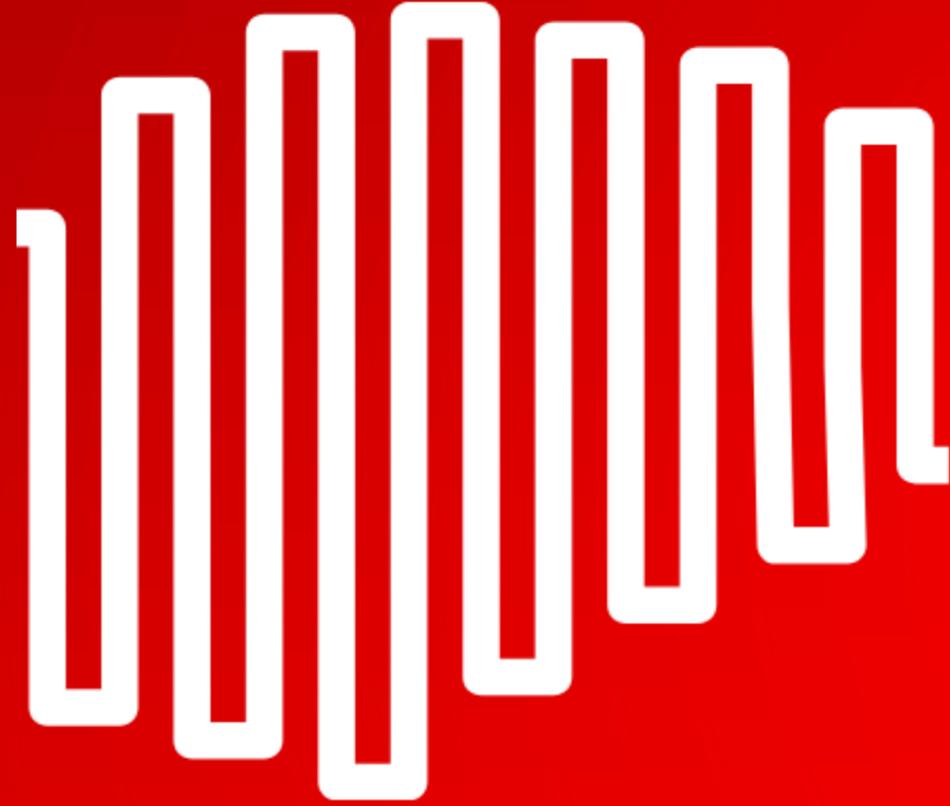


cyberAI

AI-DRIVEN CYBERSECURITY + IT SERVICES

ARTIFICIAL INTELLIGENCE | HUMAN INGENUITY



FORWARD LOOKING STATEMENTS

This presentation contains forward-looking statements that are based on our management’s beliefs and assumptions and on information currently available to us. All statements other than statements of historical facts are forward-looking. These statements relate to future events or to our future financial performance and involve known and unknown risks, uncertainties and other factors that may cause our actual results, levels of activity, performance or achievements to be materially different from any future results, levels of activity, performance or achievements expressed or implied by these forward-looking statements.

Forward-looking statements include, but are not limited to, statements about: our goals and strategies; our future business development, financial condition and results of operations; expected changes in our revenue, costs or expenditures; growth of and competition trends in our industry; our expectations regarding demand for, and market acceptance of, our products; our expectations regarding our relationships with investors, institutional funding partners and other parties we collaborate with; our expectation regarding the use of proceeds from this offering; fluctuations in general economic and business conditions in the markets in which we operate; and relevant government policies and regulations relating to our industry.

In some cases, you can identify forward-looking statements by terms such as “may,” “could,” “will,” “should,” “would,” “expect,” “plan,” “intend,” “anticipate,” “believe,” “estimate,” “predict,” “potential,” “project” or “continue” or the negative of these terms or other comparable terminology. These statements are only predictions. You should not place undue reliance on forward-looking statements because they involve known and unknown risks, uncertainties and other factors, which are, in some cases, beyond our control and which could materially affect results. Factors that may cause actual results to differ materially from current expectations include, among other things, those listed under the heading “Risk Factors” and elsewhere in the registration statement that we have filed with the SEC. If one or more of these risks or uncertainties occur, or if our underlying assumptions prove to be incorrect, actual events or results may vary significantly from those implied or projected by the forward-looking statements. No forward-looking statement is a guarantee of future performance.

In addition, statements that “we believe” and similar statements reflect our beliefs and opinions on the relevant subject. These statements are based upon information available to us as of the date on which the statements are made in this presentation, and while we believe such information forms a reasonable basis for such statements, such information may be limited or incomplete, and our statements should not be read to indicate that we have conducted an exhaustive inquiry into, or review of, all potentially available relevant information. These statements are inherently uncertain and investors are cautioned not to unduly rely upon these statements.

The forward-looking statements made in this presentation relate only to events or information as of the date on which the statements are made in this presentation. Although we have ongoing disclosure obligations under United States federal securities laws, we do not intend to update or otherwise revise the forward-looking statements in this presentation, whether as a result of new information, future events or otherwise.

Market & Industry Data

This presentation also contains estimates and other statistical data made by independent parties and by us relating to market-size and other data about our industry. This data involves a number of assumptions and limitations, and you are cautioned not to give undue weight to such data and estimates. In addition, projections, assumptions and estimates of our future performance and the future performance of the markets in which we operate are necessarily subject to a high degree of uncertainty and risk. Neither we nor our affiliates, advisors or representatives makes any representation as to the accuracy or completeness of that data or undertake to update such data after the date of this presentation.

Disclaimer

This presentation does not constitute an offer to sell or solicitation of an offer to buy securities in any jurisdiction where, or to any person to whom, it is unlawful to make such offer or solicitation in such jurisdiction. Investments in our securities may be illiquid, highly speculative and you may lose your entire investment.



ARTIFICIAL INTELLIGENCE | HUMAN INGENUITY

WELCOME TO CYBERAI GROUP



A.J. Cervantes, Jr.
FOUNDER & CHAIRMAN

CyberAI Group is building the next global leader in AI-driven Cybersecurity and IT services through a strategic 'Buy & Build' acquisition model. By acquiring and transforming profitable IT and Cybersecurity firms, we are consolidating a fragmented market to create a powerhouse at the intersection of AI and Cybersecurity.

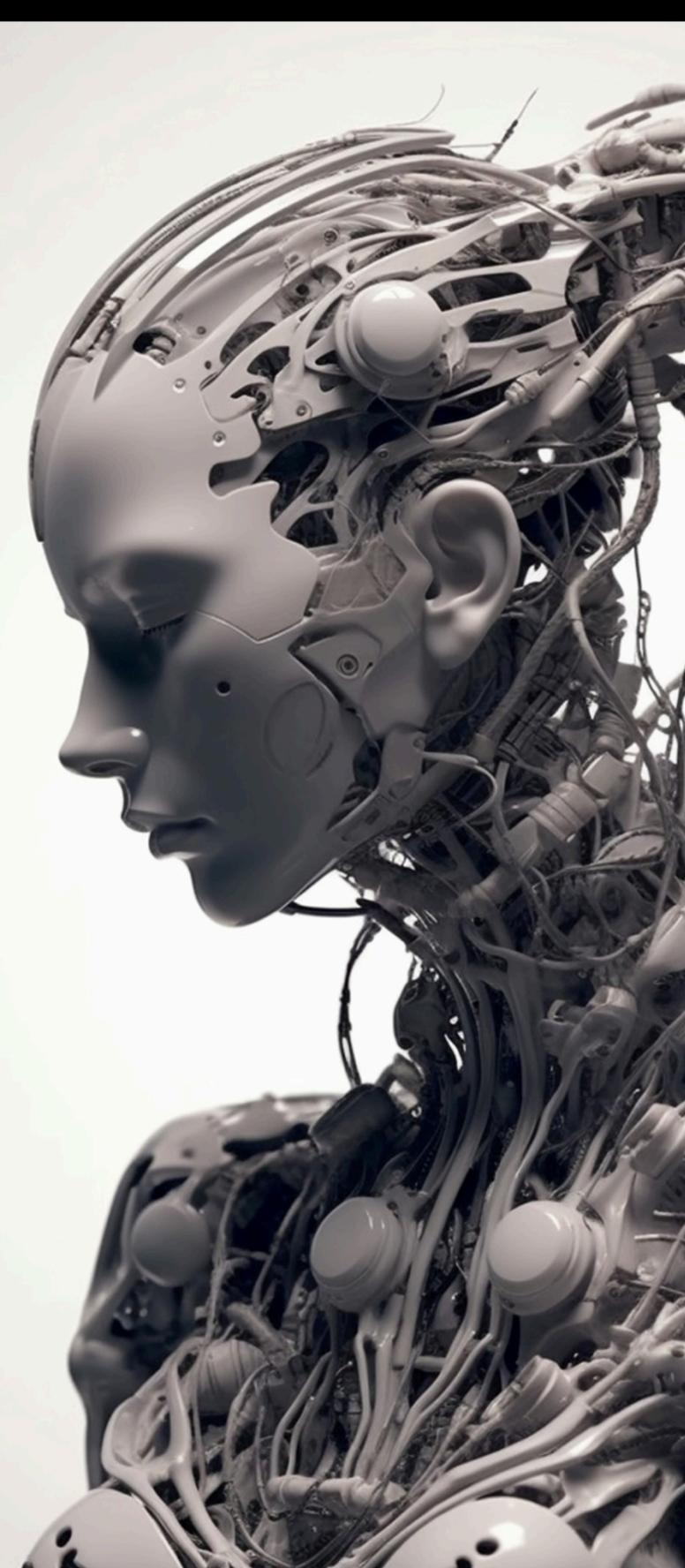
OUR MISSION

Our leadership team brings deep M&A and capital markets expertise, positioning us for rapid revenue growth beyond \$100M within 12-24 months. With a clear roadmap to a public listing, CyberAI offers investors a rare opportunity to enter at a high-value inflection point, capitalizing on the explosive demand for Cybersecurity and AI innovation.



THE COMPANY: CYBER A.I. GROUP, INC.

- AI- driven Cybersecurity and IT services.
- Acquisition of profitable IT/Cybersecurity services firms internationally.
- World-wide Buy & Build business model executing a highly proactive acquisition program.
- Expanding international Cybersecurity operations through the commercialization of evolving innovations in Artificial Intelligence on a worldwide basis.
- Positioning the Company for a public listing on the London Stock Exchange Main Market with subsequent cross-border listing on Euronext.

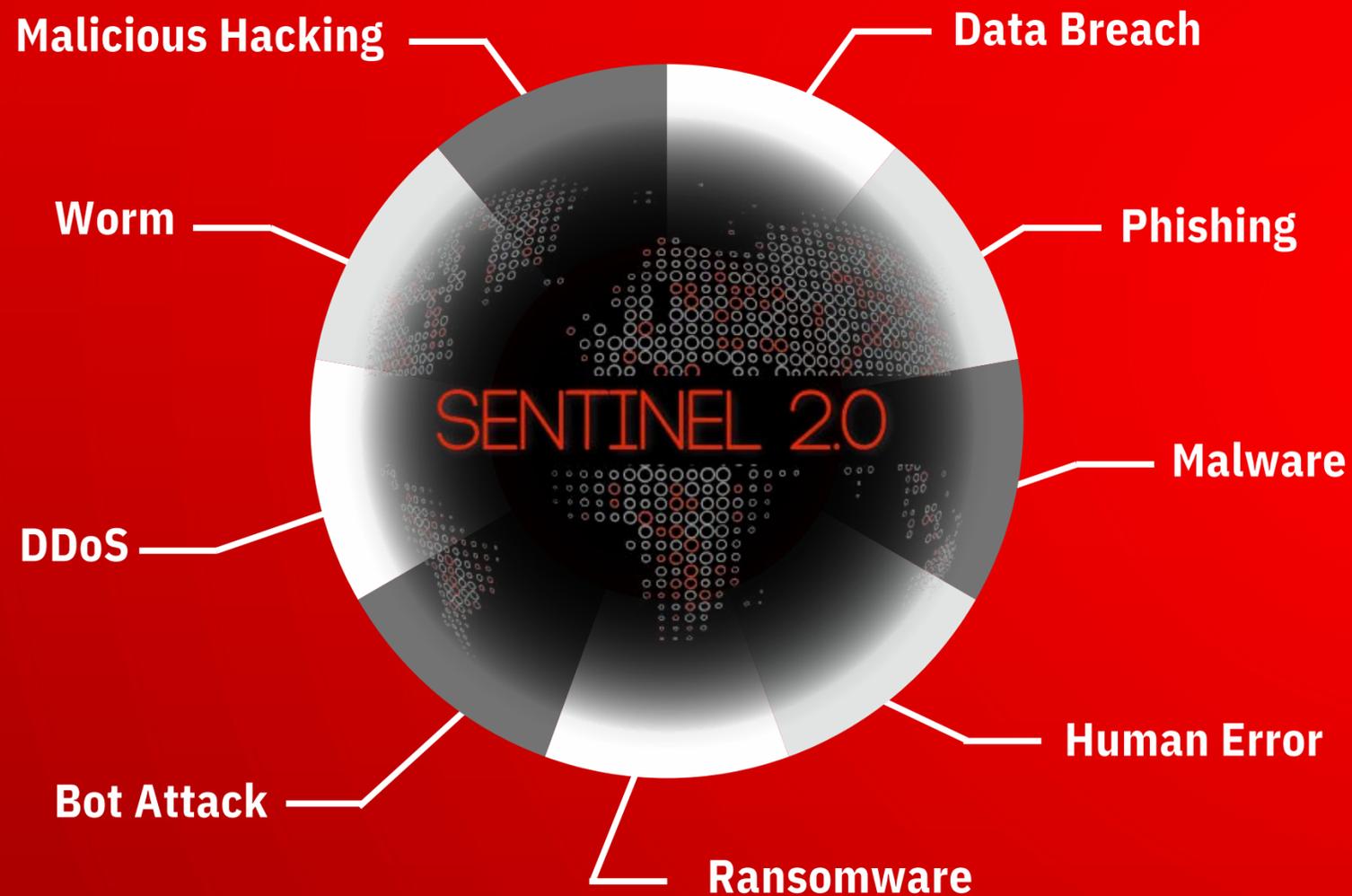


OVERVIEW: THE EXPLOSION OF AI

- Artificial Intelligence has emerged as one of the most potentially powerful and disruptive developments of the Information Age.
- CyberAI's management intends to integrate AI services in all aspects of its business.
- Highly seasoned management team is actively recruiting some of the best technology talent to develop a comprehensive robust suite of next-generation IP to create recurring revenue models for its captive client base.

SURGING DEMAND FOR AI-DRIVEN CYBERSECURITY SOLUTIONS

CYBERSECURITY THREAT BREAKDOWN



The Cybersecurity and IT services industries are experiencing unprecedented growth. Cyber threats are more sophisticated than ever, and enterprises are investing billions in AI-driven security solutions.

As of 2025, the global Cybersecurity market is projected to reach \$234.01 billion. The market is expected to grow at a compound annual growth rate of \$562.72 billion by 2032, reflecting a CAGR of 14.3%.

Overall, the entire IT services industry is valued at \$640 billion, with AI driving the next wave of innovation.

The rise of ransomware, phishing, and AI-powered cyberattacks is creating a massive demand for advanced security solutions.

CYBERAI SENTINEL 2.0™

HIGH-GROWTH PLATFORM LEVERAGING CYBERSECURITY IP



CyberAI is actively developing AI-driven Cybersecurity services designed for small and mid-sized businesses, operating on a cost-effective recurring revenue subscription model, safeguarding digital assets and preserving organizational resilience.

As CyberAI expands its customer base, Sentinel 2.0 leverages the Company's Buy-and-Build M&A strategy to drive growth and innovation.

SENTINEL 2.0 CORE SUITE OF AI-POWERED CYBER SECURITY SERVICES:

- **AI-Driven Threat Protection:** Real-time AI-powered detection, firewalls, and automated response to neutralize cyber threats.
- **Automated Security & Compliance:** Proactively manage vulnerabilities, regulatory compliance, and risk with AI-driven automation.
- **Intelligent Incident & Phishing Defense:** Rapid AI-led response to security and phishing threats, minimizing business disruption.
- **Data & Cloud Security:** Safeguard sensitive data and ensure secure, compliant cloud transitions with AI-driven protection.

EXPANSION OF CYBERAI GROUP'S ACQUISITION PIPELINE

As a critical component of its Buy & Build strategy The Company has developed a significant pipeline of prospective acquisitions. The Company now has over 300 potential acquisitions targets in various stages of due diligence and negotiation:

United States: 265

UK and EU: 69

Middle East: 18

CAPITAL MARKETS CONSIDERATIONS:

- Strategic Acquisitions: Acquiring IT Services Companies and transforming them into next-generation AI-driven Cybersecurity firms.
- Growth & IPO Focus: Targeting \$100M+ annual revenue in 12-24 months to support its IPO strategy.
- Global Expansion: Strengthening presence in the UK and EU ahead of an anticipated London Stock Exchange Main Market listing.
- Middle East Growth: Identification and acquisition of advanced technology companies in the Middle East to drive innovation.



MARKET EXPANSION → IPO READINESS

CyberAI differentiates its business model through the acquisition of profitable IT Services companies repositioned as AI-powered Cybersecurity companies.

Initial Public Offering Considerations:

- Anticipated Revenue at IPO: \$100M - \$150M+
- AI-powered Cybersecurity services driving growth.
- Valuation Arbitrage: Acquiring businesses at private company multiples and benefitting from higher public company valuations.

MEET THE LEADERSHIP TEAM



A.J. Cervantes, Jr.
FOUNDER & CHAIRMAN



A.J. has been directly involved in 200+ public companies, overseeing IPOs, PIPEs, and strategic acquisitions. He is the Chairman of Trilogy Capital Group, a private equity firm and CyberAI's principal shareholder. His extensive cross-border transaction experience and deep knowledge of international stock exchanges is critical for CyberAI's listing strategy.



Walter L. Hughes
CHIEF EXECUTIVE OFFICER



Walter holds an MBA and a Ph.D. in Finance & Corporate Strategy, is a Six Sigma Master Black Belt and Certified Agile Scrum Master. His leadership ensures CyberAI Group executes a disciplined, high-growth strategy while staying ahead of AI and Cybersecurity innovations. He has led major initiatives at Meta, Anthem, and Quant16, managing multi-billion-dollar portfolios and driving innovation. His deep understanding of both technology and finance serves to drive CyberAI's international success.

MEET THE LEADERSHIP TEAM



Darren Minton
VICE CHAIRMAN & PRESIDENT



Darren, an executive with over two decades of capital markets experience and CEO of Trilogy Capital Group, a private equity firm and CyberAI's principle shareholder, is highly specialized in private-to-public transactions, capital formation and M&A. With a degree from Stanford University in Economics and deep operational expertise, he helps ensure CyberAI's successful acquisition strategy.



Jessica Walters
CHIEF MARKETING OFFICER



Jessica, a marketing leader with 15+ years of experience has deep understanding of positioning, branding, messaging and financial communications. She integrates digital marketing, AI, and CRM automation to drive high-impact campaigns, accelerate growth, and strengthen CyberAI's global impact and investor relationships.



Cheryl Allison
SR. VICE PRESIDENT | ACCOUNTING



With 25 years of experience in Accounting and financial management, Cheryl specializes in SEC filings, Auditing, reconciliations, and ERP implementations, ensuring compliance with GAAP and IFRS while optimizing CyberAI's financial strategy for acquisitions and its public listing.

ASSOCIATED PROFESSIONALS

GREENBERG TRAURIG, LLP



Greenberg Traurig is an international multidisciplinary law firm with 47 offices in Europe, the Middle East, Latin America, the US and Asia, with approximately 2,750 attorneys worldwide who provide high caliber legal services to a broad range of clients.

BDO GLOBAL



BDO is an international network of public accounting, tax and advisory firms which perform professional services with professional services in 166 countries with 115,661 people in 1,776 offices worldwide.

REVENUE ROCKET



The Company has engaged Revenue Rocket, a Minneapolis-based M&A advisory firm specializing in IT services, to lead its buy-side strategy, leveraging 24 years of experience and a proven track record recognized by the 2023 Inc. 5000 list.

BEVILACQUA



Bevilacqua is a U.S. transactional law firm offering expert legal guidance from startup financing to public offerings for private and public companies.

THINKEQUITY



ThinkEquity, a New York-based investment bank with a \$50B track record, will provide principal acquisition financing for the Company, leveraging decades of capital markets experience.

RICHARDSON OLIVER LAW



Richardson Oliver Law Group specializes in business-focused intellectual property services, including patent valuation, monetization, and portfolio management, combining legal expertise with technical knowledge.

CYBERAI'S PARALLEL GROWTH STRATEGY WILL DRIVE MAXIMUM VALUE CREATION



TECHNOLOGY TRACK

AI Integration & Expansion:
Rebranding and integrating next-
gen Cybersecurity solutions.



EXPANSION TRACK

Strategic Acquisitions:
Identifying and acquiring
profitable IT and
Cybersecurity firms.



CAPITAL TRACK

IPO Readiness:
Scaling revenues and
preparing for London
Stock Exchange listing.

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