Portfolio Tracking Report

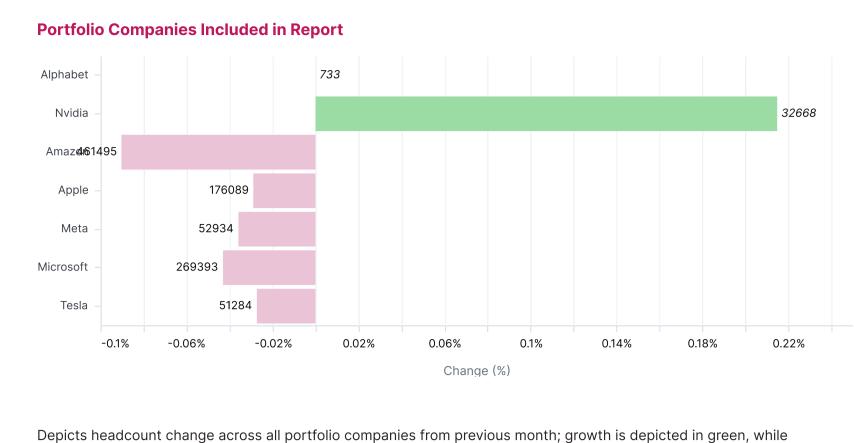
Portfolio companies: Nvidia, Apple, Microsoft, Amazon, Meta, Alphabet, Tesla Report Month: 2025-03

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Portfolio overview

This section provides a quick glance at the companies in the portfolio and the change in their headcount over the previous month. For example, you can find:

- How much has a company in the portfolio grown in headcount over the previous month? • Which companies in the portfolio are expanding the fastest?



reductions are in red

Portfolio aggregate indicators

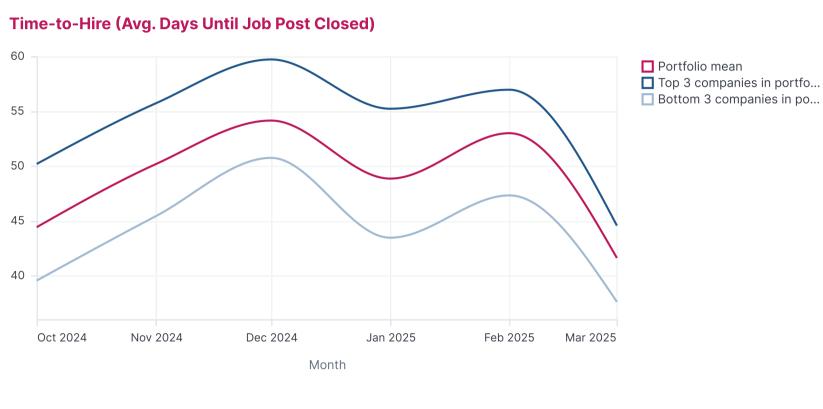
This section compares the overall portfolio performance with that of the top and bottom companies across various metrics. Some of the questions that this section answers:

- How rapid is the hiring in top companies when compared to the rest of the companies in the portfolio (*Time-to-hire*)? • Does the portfolio have enough companies that are growing at a fast enough rate (*Growth index*)? • How does the overall sentiment across compensation, senior management and job satisfaction look like?

Growth Index (% Change in Headcount) 0.6% Portfolio Mean ■ Top 3 companies in portfo... 0.5% ☐ Bottom 3 companies in po... 0.4% 0.3% 0.1% 0% -0.1% -0.2% -0.3% Oct 2024 Nov 2024 Dec 2024 Jan 2025 Feb 2025 Month

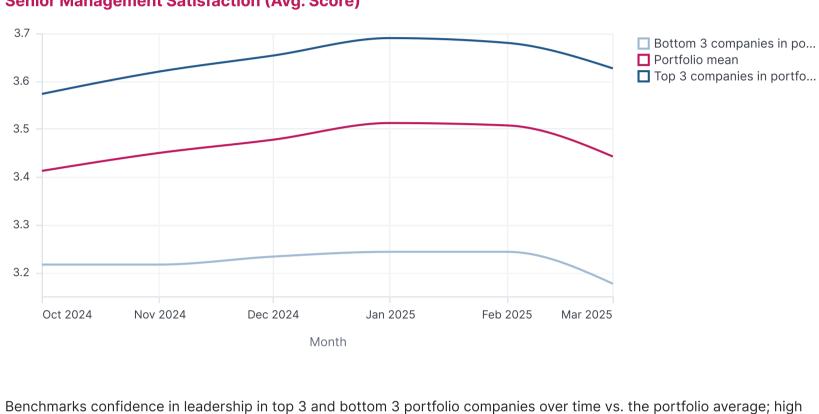
average; positive growth means hiring, while declines suggest downsizing

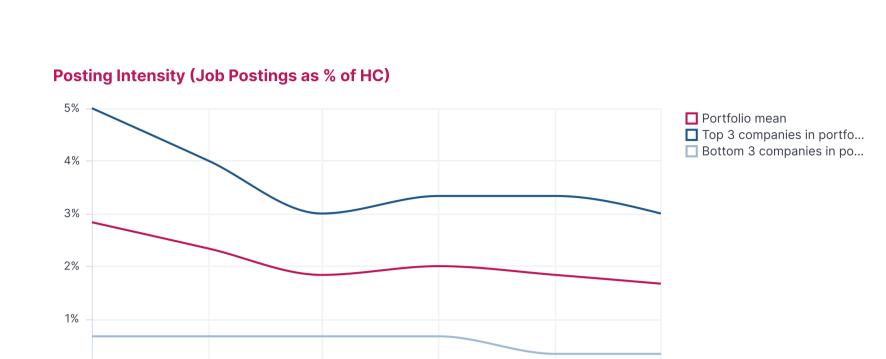
Measures % change (MoM) in headcount of the top 3 and bottom 3 portfolio companies over time vs. the portfolio



Senior Management Satisfaction (Avg. Score)

Measures time-to-hire for the top 3 and bottom 3 portfolio companies over time vs. the portfolio average; lower time-to-





values indicate rapid growth

Tracks job posting momentum of the top 3 and bottom 3 portfolio companies over time vs. the portfolio average; higher

Jan 2025

Feb 2025

0%

Oct 2024

Nov 2024

higher scores suggest a more satisfied workforce

scores may indicate retention risks

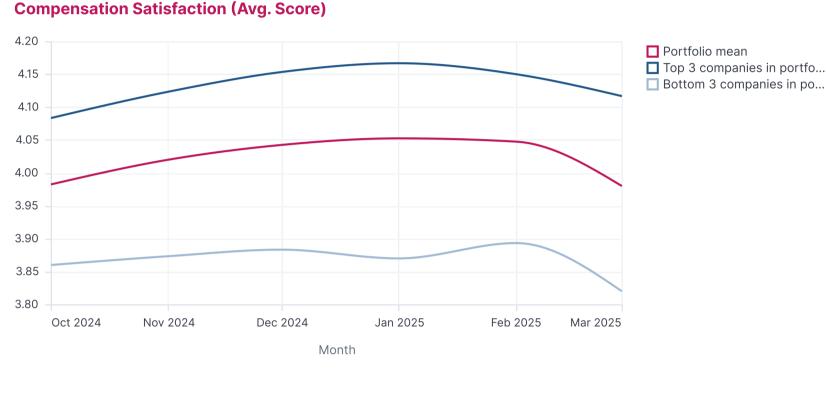
Dec 2024

Month



Compensation Satisfaction (Avg. Score)

Captures employee satisfaction in top 3 and bottom 3 portfolio companies over time, compared to the portfolio average;



Tracks employee sentiment on pay for top 3 and bottom 3 portfolio companies over time vs. the portfolio average; lower

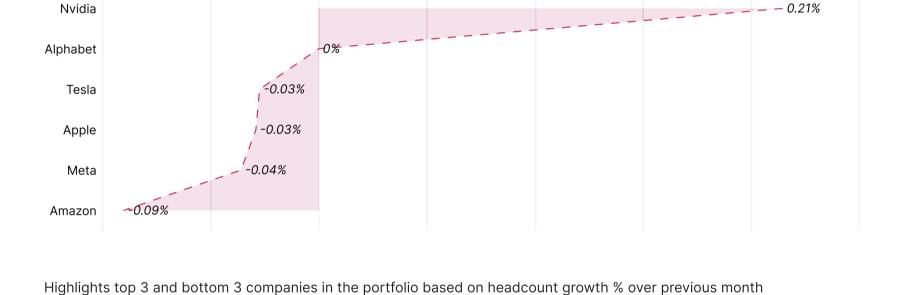
This section compares the top and bottom 3 companies to reveal key trends in hiring and sentiment. Some of the questions that this section answers: • Which companies are thriving and struggling the most in terms of growth, and how does that reflect in their hiring trends?

Portfolio deep dive

scores indicate strong management approval

hire indicates faster hiring cycles

• Which companies are leading and lagging across various sentiment scores?

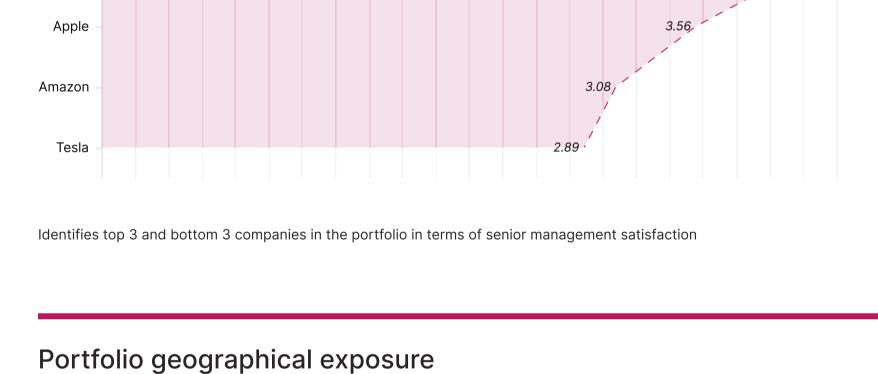


Top 3 High & Low Performers - Time-to-Hire (Avg. Days Until Job Post Closed)

Top 3 High & Low Performers - Growth Index (% Change in Headcount)



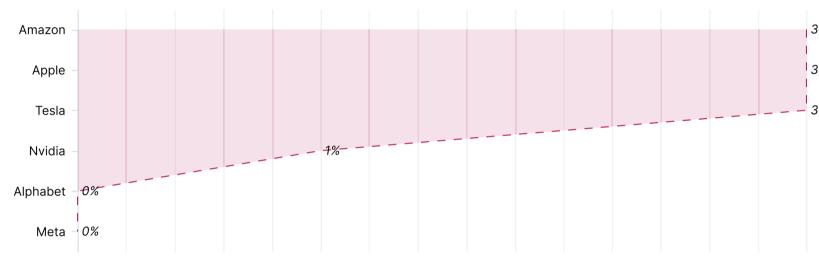
Top 3 High & Low Performers - Senior Management Satisfaction (Avg. Score) Nvidia



This section provides information on the geographical distribution of the portfolio companies' current workforce and new job postings. Some of the questions that this section answers are: • What are the top countries driving the engineering talent pool in the portfolio companies (Geographic footprint)?

Amazon

Top 3 High & Low Performers - Posting Intensity (Job Postings as % of HC)



Top 3 High & Low Performers - Job Satisfaction (Avg. Sentiment Score)

Compares job posting momentum of top 3 and bottom 3 companies in the portfolio



Apple

Nvidia

Top 3 High & Low Performers - Compensation Satisfaction (Avg. Score)



Change (%)

16.81%

-19.39%

-54.72%

16.4%

2.34%

-54.71%

-27.52%

-43.37%

Change (%)

23%

18%

62%

180%

-1%

-17%

102%

-2%

16%

Seniority

Mid Тор

45

40

5.5 6.0

5.0

Unclassified

2%

Job Postings ↓

3044

831

650

591

537

535

515

502

500

439

25

30

12.2%

Job Postings ↓

11968

1397

1232

1022

394

380

366

331 329

• Which locations are the portfolio companies targeting for workforce expansion (*Top 10 countries in demand*)?

Top 10 Countries in Demand Geographic Footprint

Role Level 1

Finance

Interns

Leadership

HR

IT

Engineering

80% 60%

Headcount

100%



• Do the changes in job role demand align with broader industry transformations? (*Top 10 growing job roles*)?

Country

united kingdom

india

canada

italy

france

ireland

singapore

united states of america

Top 10 Job Titles in Demand

Highlights the most important hiring locations globally, showing workforce expansion trends

Role Functions in Demand Role Level 1

Other G&A

Finance

Accenture

Amazon

Hp, Inc.

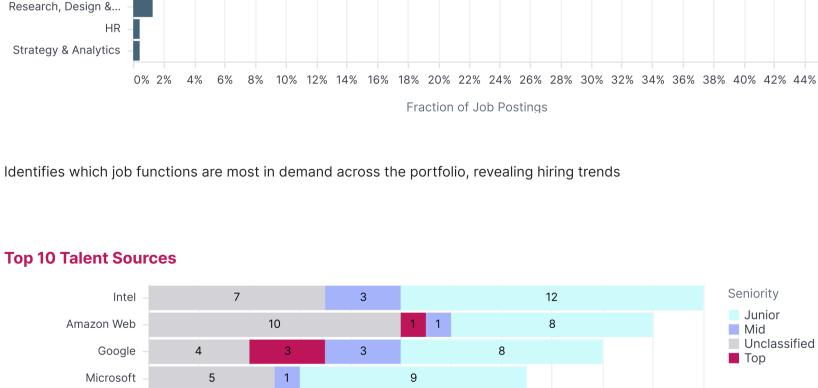
Apple

Freelance Self Employed

Ernst Young Global

Marketing

Engineering Software Developer / Engineer Operations Computer Systems Engineer / Architect Sales Computer Support Specialist Interns



14 **Employee Count**

Unclassified

Lists the most common hiring sources, showing where companies attract talent from **Top Seniority Talent Sources by Role** Role Level 1 Google Accenture Engineering Operations Advanced Micro Devices Marketing Amazon Leadership Amazon Web Apple Legal IT Carmax Cd Peacock Jewelers Cisco Webex Doordash Servicenow

Employee Count

Highlights where senior employees are hired from, indicating key executive recruitment channels

Research, Design & Devel... White Case X United States 0.0 0.2 0.4 0.6 0.8 1.0 1.2 1.4 1.6 1.8 2.0 2.2 2.4 2.6 2.8 3.0

Job Postings

24

71

201

24

591

210

86

154

28

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Change (%) ↓

700%

294%

287%

200%

180%

166%

139%

133%

115%

112 111%

Top 10 Growing Job Roles

Registrar / Patient Service Representative

Job Title

Fraud Examiner / Analyst

Real Estate Agent / Broker

Inventory / Supply Specialist

Bookkeeper / Accounting Clerk

Scheduler / Operations Coordinator

Retail Sales Associate

Creative Director

Materials Engineer

Hotel Desk Clerk

Anduril Industries

Freelance Self Employed

Amazon Web

Job Title

Retail Sales Associate

Tractor-Trailer Truck Driver

Account Manager / Representative

Retail Store Manager / Supervisor

Program Manager

Product Manager

Sales Representative

Lists the most sought-after job roles, reflecting hiring priorities **Top 10 Talent Destinations** Alianza 15 Salesforce Hcl Technologies

Uber Technologies 15 20 **Employee Count**



0.0 0.5 1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 **Employee Count**

Tracks where senior talent moves after leaving, helping assess leadership retention

Top 10 Declining Job Roles		
Job Title	Job Postings	Change (%) ↑
Laborer / Warehouse Worker	379	-79%
Property / Real Estate / Community Manager	28	-71%
Training And Development Manager	25	-53%
Production Worker	21	-50%
Merchandiser	24	-49%
Tax Manager	24	-49%
Pricing Analyst	22	-49%
Industrial Mechanic	22	-46%
Human Resources / Labor Relations Specialist	65	-46%
Communications / Public Relations Specialist	28	-46%

Highlights job roles experiencing the fastest hiring growth, indicating emerging industry needs Shows job roles with decreasing demand, signaling shifts in industry focus or automation impacts

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