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Mogo Inc's Bitcoin Strategy Anchors Q2 2025 Preview

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Vancouver, Canada, Canadian fintech company Mogo Inc. is poised to release its Q2 2025 earnings on August 7, 2025, placing emphasis on Bitcoin allocation, monetisation of its WonderFi stake, and expansion in digital commodities.

Mogo has board approval to allocate up to C\$50million to Bitcoin as part of a capital preservation strategy that sets Bitcoin as a benchmark or “hurdle rate” for all future investment decisions. Management intends to deploy new capital into areas that exceed Bitcoin’s long-term returns. Recent share repurchases of about 2% of outstanding stock

about 523,000 shares at roughly US\$1.44 each further reflect confidence in the firm's intrinsic value.

The pending WonderFi–Robinhood acquisition expected in the second half of 2025 is also pivotal. Proceeds from monetising Mogo's WonderFi stake could fund Bitcoin purchases, reduce debt, or support growth initiatives.

Mogo's growing interest in Digital Commodities Capital Corp. a company focused on holding Bitcoin and physical gold signals diversification into blockchain-based asset management. Recently, Mogo acquired about 9% of Digital Commodities through a private placement valued around US\$1 million.

On the operations side, Mogo's "Mogo 3.0" platform now automates approximately 60% of customer support with AI, reducing costs and enhancing user experience. The company also offers customers tools to monitor carbon footprints, adding ESG appeal.

Although Q1 2025 revenue rose modestly to C\$ 16.7 million, Mogo reported a net loss of about C\$8.25 million. Investors will look for signs of positive adjusted EBITDA in Q2, as profitability remains a top priority.

As the earnings date approaches, key areas to watch include:

1. Progress in Bitcoin asset accumulation
2. Timing and value of WonderFi monetisation
3. Early revenue contribution from digital commodities
4. Evidence of AI-driven margin improvement

While regulatory uncertainties and Bitcoin price volatility pose risks, Mogo's capital strategy reflects a bold fintech play blending crypto reserves with traditional wealth services. The Q2 earnings report should shed light on whether these strategic moves are translating into sustainable shareholder value.