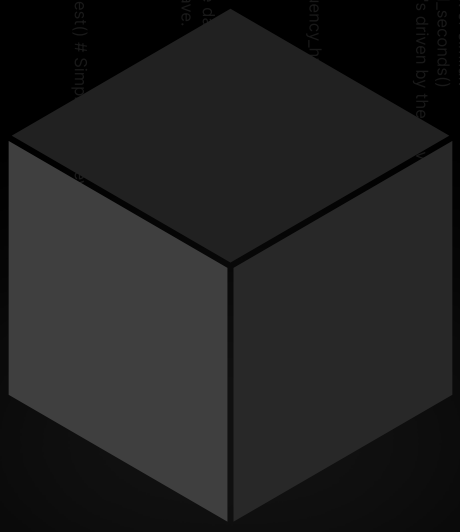

# AIOS

INVESTMENT

# PITCH DECK

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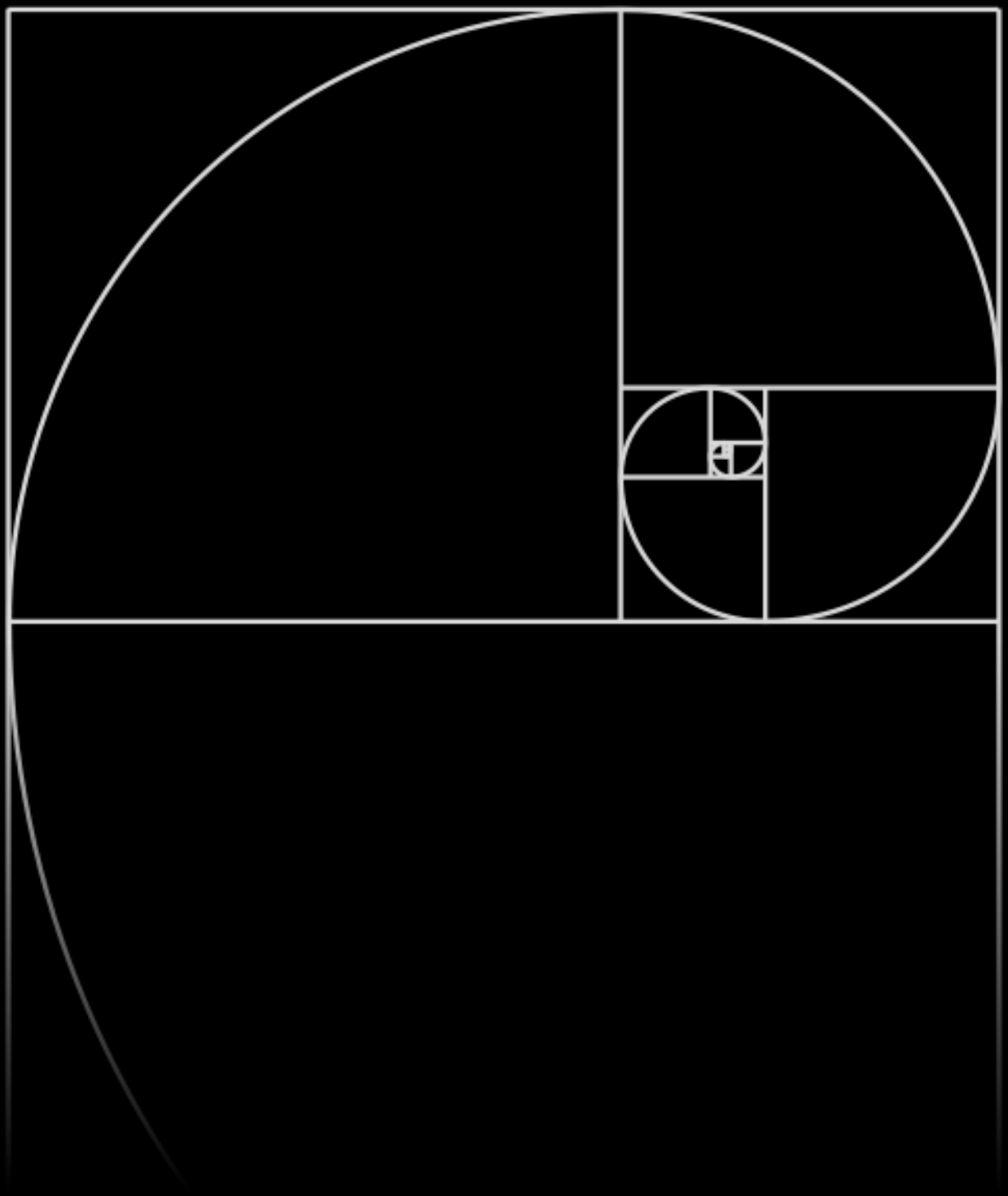
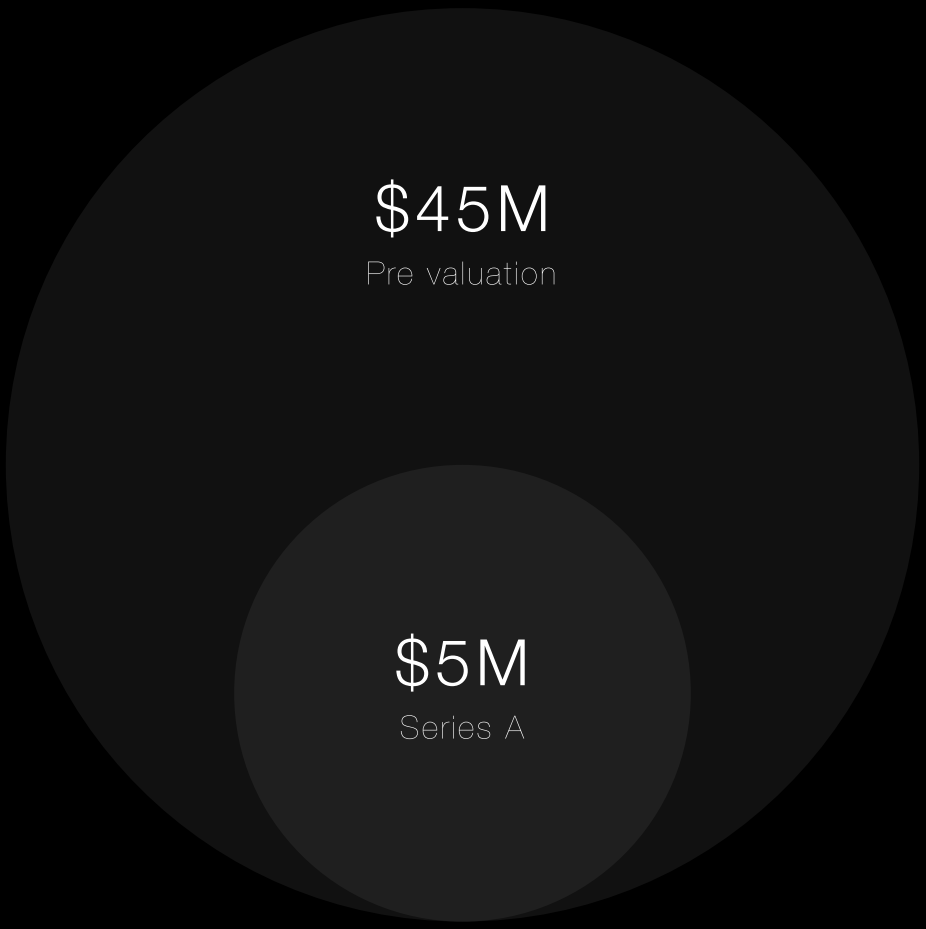


# EXECUTIVE SUMMARY

AIOS is building the definitive OS-native agentic AI platform, enabling direct computer control through a model-agnostic architecture. Unlike cloud-based competitors, we're delivering native Windows/Mac integration with MCP (Model Context Protocol) standardization, positioning us to capture significant share of the $22B AI automation market by 2027.

INVESTMENT HIGHLIGHTS



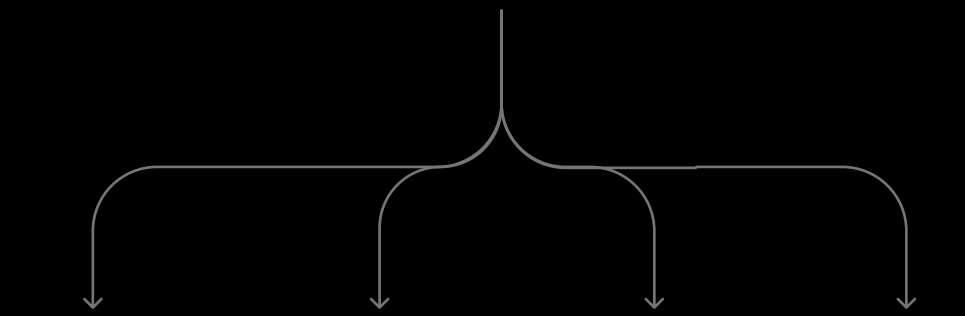

AIOS seeks $5M Series A funding at a $45M pre-money valuation. This investment will fuel our OS-native agentic AI platform.

INVESTMENT HIGHLIGHTS

# NATIVE OS

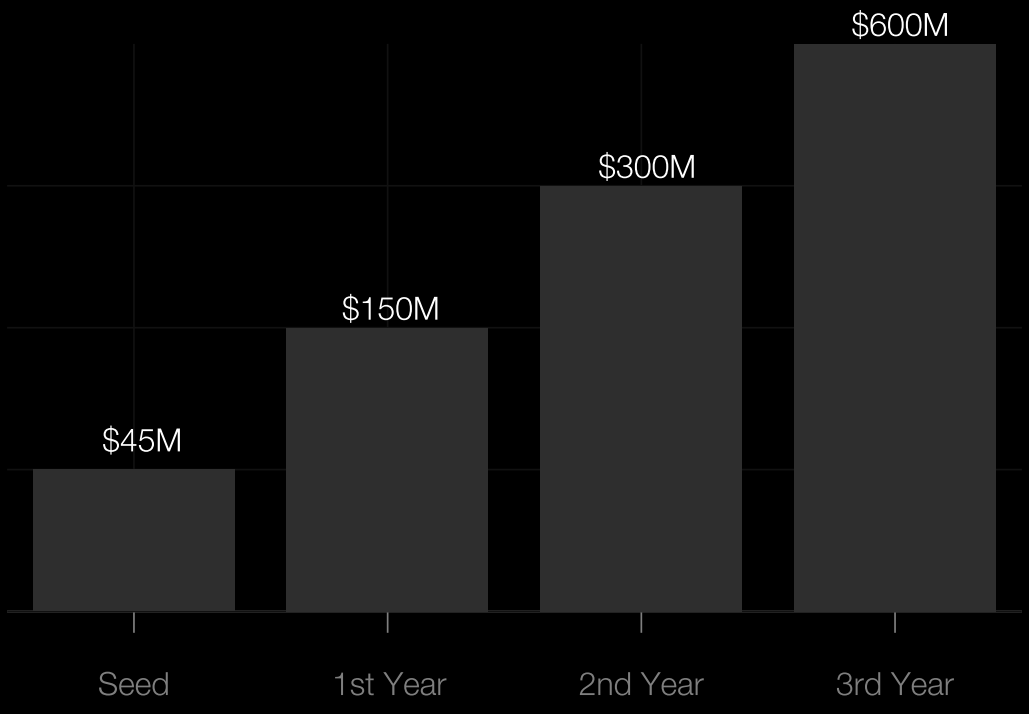
AIOS offers native OS integration for its agentic AI, meaning it runs directly on the system, not in a VM or the cloud. This provides deeper control and efficiency.

# AIOS



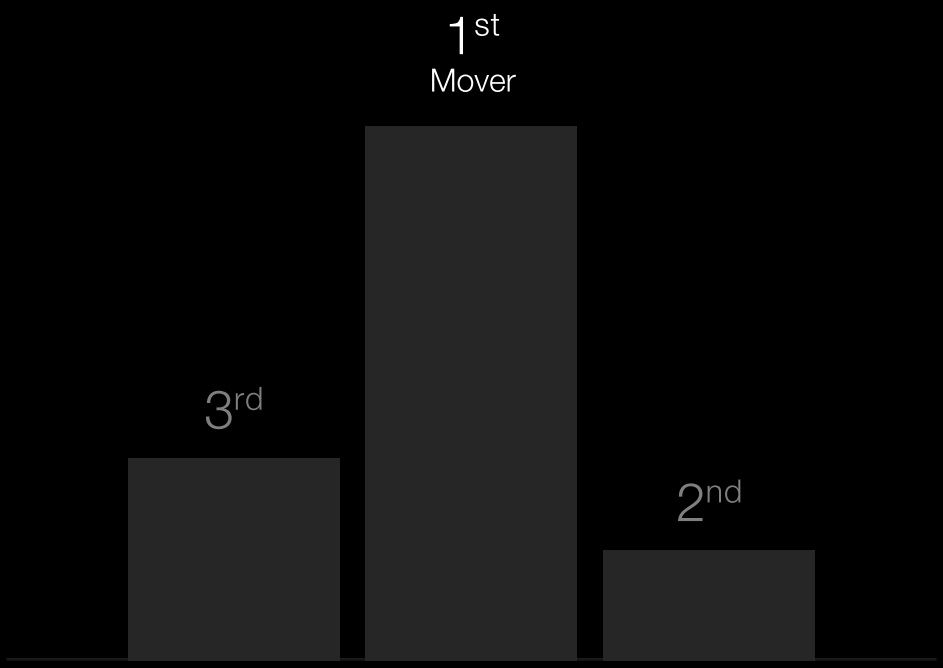

AIOS employs a *model-agnostic* architecture with MCP standardization. This allows flexibility and broad compatibility.

INVESTMENT HIGHLIGHTS




AIOS projects a path to a $600M valuation by Year 3, based on achieving $40M in EBITDA and a 15x multiple.

INVESTMENT HIGHLIGHTS




AIOS targets first-mover advantage in native desktop automation via OS-integrated, model-agnostic AI. This unique approach aims to capture the desktop power user and SMB markets early.

## The Agentic AI Inflection Point

The market is transitioning from conversational to agentic AI. While multiple players are entering this space, critical differentiation exists

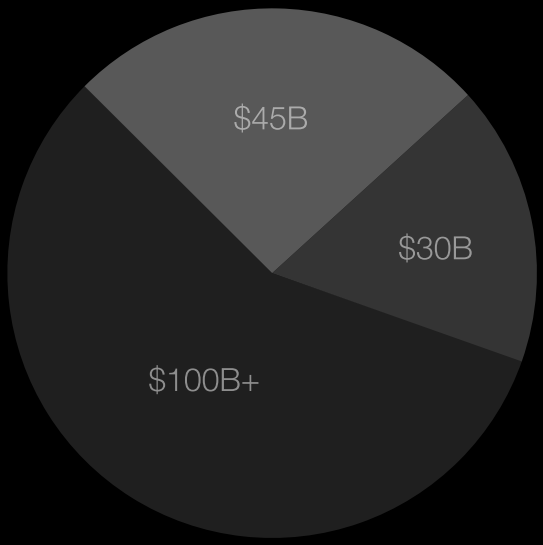
| CATEGORY | LIMITATION | AIOS ADVANTAGE |
| --- | --- | --- |
| Cloud-Based Agents<br>ADEPT Induced | Latency<br>privacy concerns<br>limited OS access | Native execution<br>local compute<br>full system access |
| Single-Model Solutions<br>OpenAI Agents<br>SIMULAR | Vendor lock-in<br>limited extensibility | Model-agnostic<br>MCP-enabled |
| Browser-Only<br>Browserbase Playwright | No desktop - application control | Full OS integration |
| Enterprise-Only<br>UI PATH AI | Complex deployment<br>high cost | Consumer-friendly<br>immediate deployment |

MARKET DYNAMICS & OPPORTUNITY

# TAM ANALYSIS

## PRIMARY

250M DESKTOP POWER
USERS × $180 ARPU




## SECONDARY

50M SMBS SEEKING
AUTOMATION × $600 ARPU

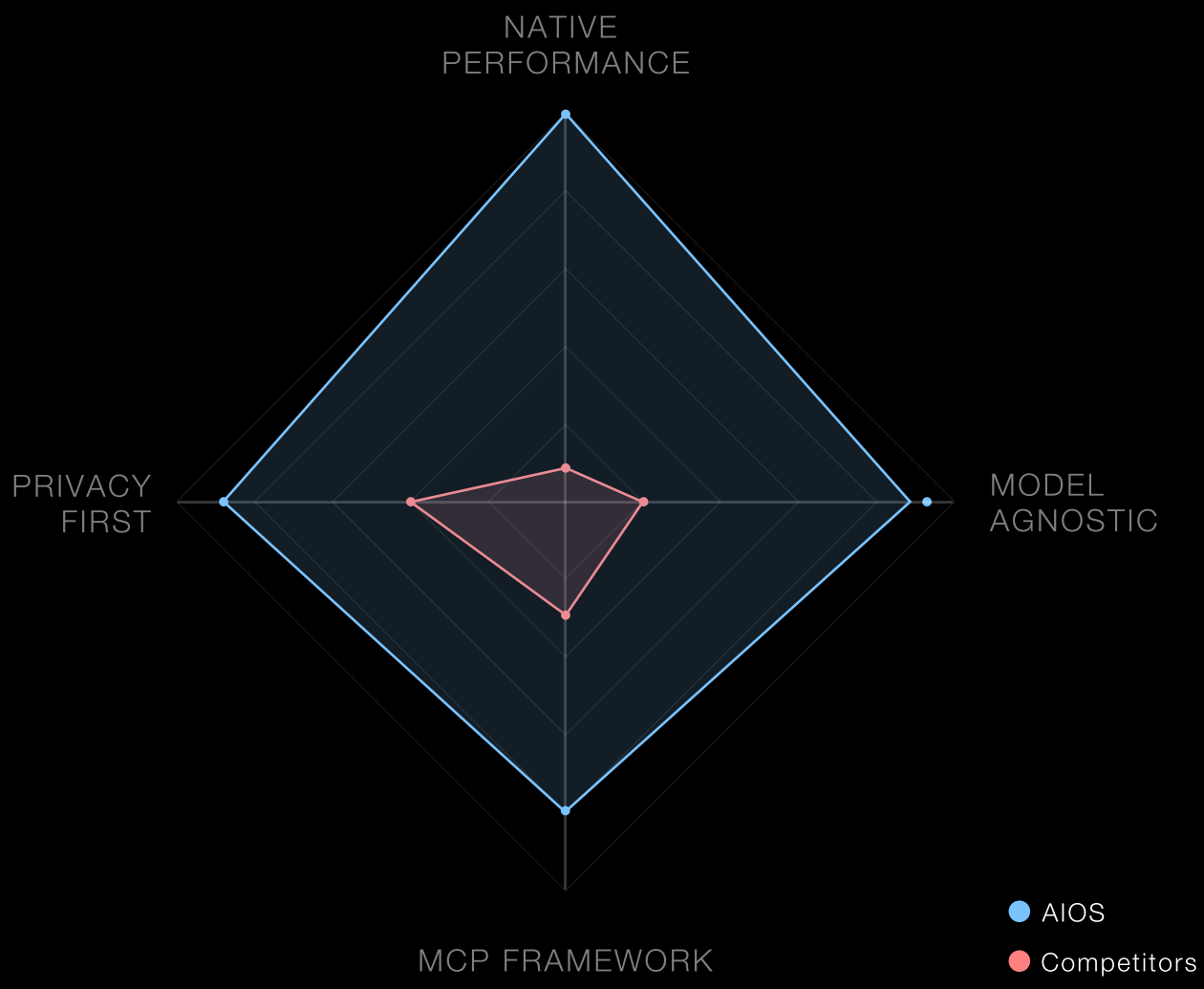
## TERTIARY

MOBILE EXPANSION (2B USERS)
= $100B+ OPPORTUNITY

AIOS targets a large and growing TAM, starting with desktop power users ($45B) and SMB automation ($30B). The future mobile market offers a $100B+ expansion opportunity, showcasing significant growth potential.

# MOAT

## DEFENSIBLE ADVANTAGES




1. **Native Performance:** 10x more powerful than cloud-based solutions
2. **Model Agnostic:** Hours to integrate new models vs. months for competitors
3. **MCP Framework:** Industry-standard protocol for tool integration
4. **Privacy-First:** Local execution addressing enterprise security concerns

BUSINESS MODEL & UNIT ECONOMICS

# REVENUE MODEL

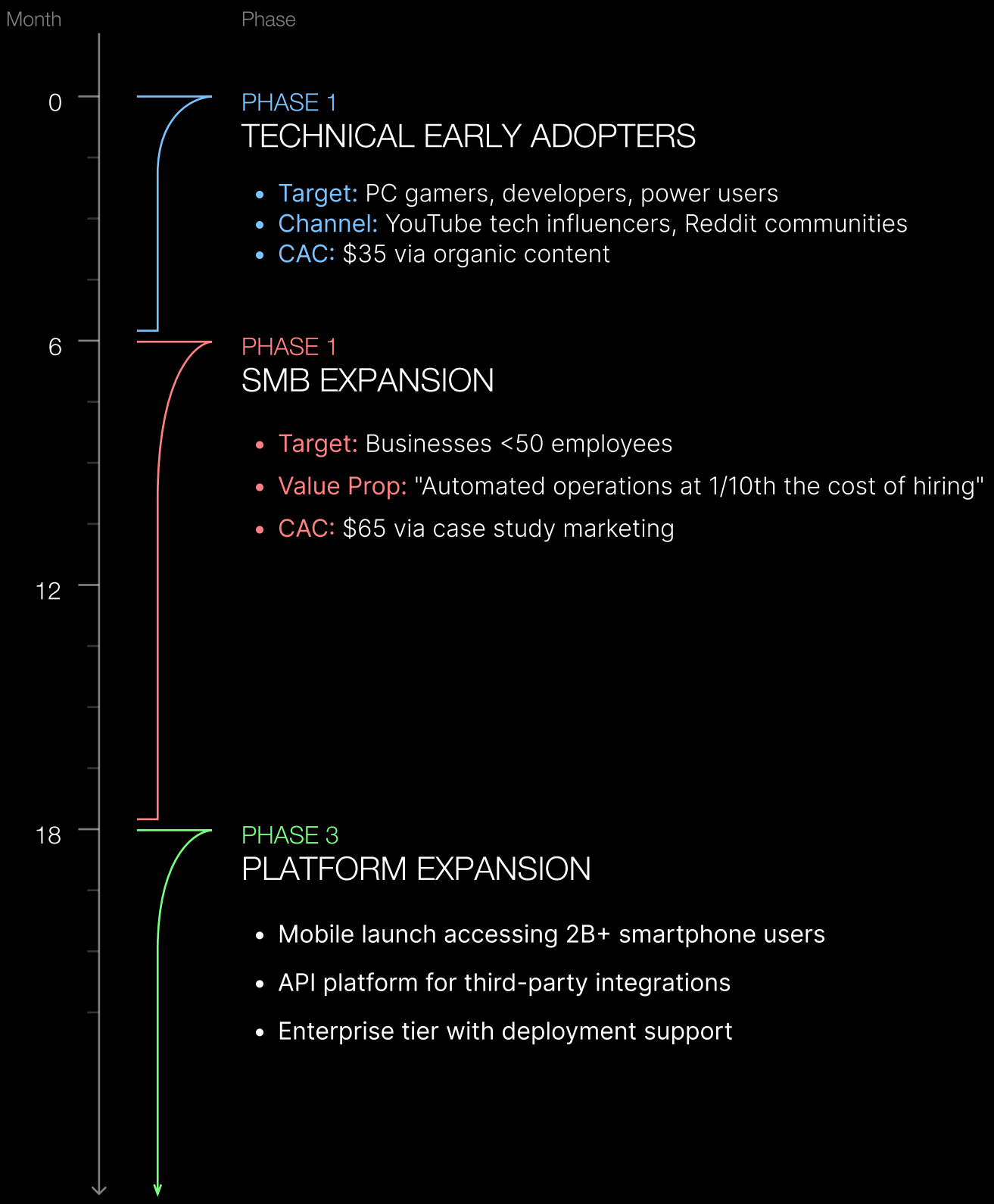
| CATEGORY | DETAILS |
| --- | --- |
| B2C SaaS | $9.99 - $49.99/month tiers |
| AI Compute Credits | 3% - 33% margin on usage |
| Future | Enterprise licenses & API access |

# COHORT ECONOMICS

| CATEGORY | DETAILS |
| --- | --- |
| CAC (Customer Acquisition Cost) | $35 - $65 (blended) |
| Month 1 Retention | 85% |
| Month 12 Retention | 75% |
| LTV/CAC Ratio | 5.4x - 18.5x |
| Payback Period | 3 - 4 months |

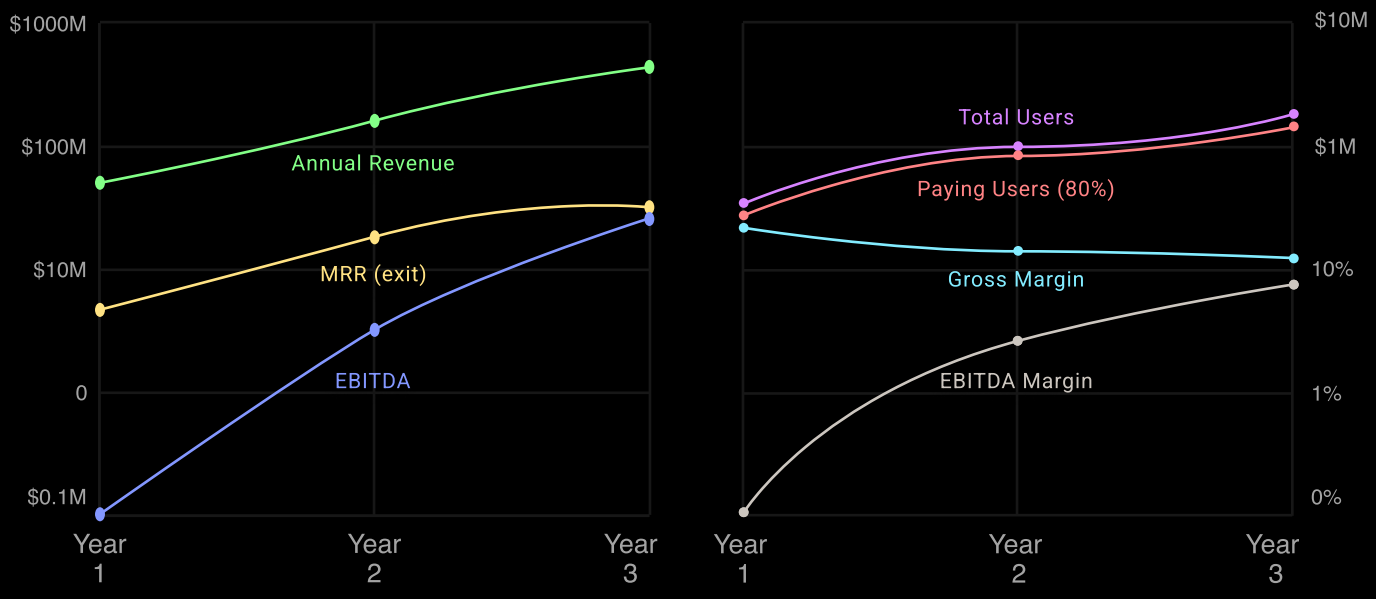
STRATEGY

# GO-TO-MARKET STRATEGY



STRATEGY

# FINANCIAL PROJECTIONS




| METRIC | YEAR 1 | YEAR 2 | YEAR 3 |
|---|---|---|---|
| Total Users | 400K | 1M | 2.5M |
| Paying Users (80%) | 320K | 800K | 2M |
| MRR (exit) | $4.8M | $14.4M | $44M |
| Annual Revenue | $57.6M | $172.8M | $528M |
| Gross Margin | 0.25 | 0.18 | 0.12 |
| EBITDA | -$3M | $5M | $40M |
| EBITDA Margin | -0.052 | 0.029 | 0.076 |

STRATEGY

# CURRENT VALUATION

$45M PRE-MONEY

- REPRESENTS 0.78X YEAR 1 PROJECTED REVENUE
- SIGNIFICANTLY BELOW 2-5X SAAS INDUSTRY STANDARD
- CONSERVATIVE VALUATION PROVIDES IMMEDIATE UPSIDE FOR INVESTORS

## VALUATION TRAJECTORY


Comparable Exits

UiPath ($35B)
Automation Anywhere ($6.8B)

AIOS projects significant valuation growth, reaching $600M by Year 3 with a 15x EBITDA multiple.

LEADERSHIP TEAM

# EXECUTIVE TEAM

Chairman & Investor

## Francis Edelman

- A seasoned serial entrepreneur with a track record of building successful ventures.
- Possesses deep AI market insights, understanding key trends and opportunities in artificial intelligence.
- An active investor who brings strategic guidance and industry connections.

CEO

## Andrea Edelman

- Over 15 years leading Blackcode SA, demonstrating long-term leadership and stability.
- Focuses on achieving strong operational efficiency and optimized processes.
- Known for proven strategic leadership and the ability to execute organizational goals.

LEADERSHIP TEAM

# EXECUTIVE TEAM

CTO

## Eric Marion

- Senior technology leader (20+ years experience)
- Managed complex software projects at major financial institutions (BCV, BNP Paribas, Credit Agricole)
- Expert in enterprise software integration and agile development methodologies
- Leading AIOS technical strategy and architecture

Engineering Lead

## Ibrahim Muhammad

- Expertise in core platform development, ensuring a robust and scalable AIOS foundation.
- Specializes in MCP implementation, bringing focused knowledge of this specific platform.
- Offers 10+ years of experience in cross-platform development, enhancing the platform's versatility.

PROCEEDS

# USE OF PROCEEDS

| Allocation | Amount | Deliverable |
|---|---|---|
| Engineering & computing & team (70%) | $3.5M | Mac release, Windows version enhancement, new features, continuous improvement, recruitment, servers & infrastructure |
| Growth & advertising* (20%) | $1M | Content partnerships, SMB outreach |
| Operations (10%) | $0.5M | Various |

*ASSUMES STRONG WORD OF MOUTH AND 0 COST USER ACQUISITION AT A RATE OF 95%+ COMPARABLE TO OTHER SUCCESSFUL AI COMPANIES.

# RISK FACTORS & MITIGATION

| Risk | Mitigation Strategy |
|---|---|
| Platform dependency | Native integration reduces API risk |
| Competition from incumbents | Speed to market, model-agnostic approach |
| User acquisition costs | Organic growth through creator economy |
| Technical complexity | Proven POC, experienced team |

# INVESTMENT TERMS

$45M
PRE-MONEY VALUATION

$5M
AMOUNT

10%
POST-MONEY OWNERSHIP

Structure
Series A Preferred Stock

1X
LIQUIDATION PREFERENCE

5 SEATS
BOARD COMPOSITION
2 FOUNDERS, 1 INVESTOR, 2 INDEPENDENT

ANTI-DILUTION
WEIGHTED-AVERAGE BROAD-BASED

?

# WHY NOW

1. MCP Standardization: Industry coalescing around open protocol
2. Model Maturity: Models finally capable of reliable agency
3. Market Education: Users understand AI, ready for next evolution
4. Competition Fragmented: Window to establish category leadership

# EXIT STRATEGY

**STRATEGIC ACQUIRERS**

- Microsoft (extend Windows AI capabilities)
- Apple (AI integration for Mac ecosystem)
- Salesforce/ServiceNow (automation expansion)

**STRATEGIC ACQUIRERS**

- Comparable multiples: 10-30x revenue for AI automation
- Timeline: 3-5 year horizon
- Minimum target: $1B+ valuation

# EUROPEAN ADVANTAGE

## STRATEGIC POSITION IN UNDERSERVED MARKET

Europe represents 25% of global enterprise software spending but hosts no major B2C software platforms. This creates unique opportunities:

## MARKET DYNAMICS

- Significant government interest in developing local AI champions
- EU investing €20B in digital sovereignty initiatives
- Growing preference for privacy-compliant, locally-operated solutions
- Reduced competition from US/China players who prioritize home markets

## REGULATORY ALIGNMENT

- GDPR-compliant by design through local compute architecture
- Swiss base provides neutrality for global expansion
- Positioned to benefit from EU Digital Markets Act provisions

## SCALING BENEFITS

- Access to European talent without Silicon Valley cost inflation
- Eligibility for innovation grants and R&D tax incentives
- Potential sovereign fund investment as user base grows
- Strategic value to acquirers seeking established European presence

## HISTORICAL CONTEXT

European governments have shown strong support for breakout tech companies (Spotify, BioNTech, Mistral AI). As AIOS scales, we're positioned to become a strategic asset in Europe's push for technological sovereignty.

# CONTACT


## Francis Edelman

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**Phone:** +41 79 340 73 82


AIOS

**www.getaios.com**

*We are not an AI company - we are a prompt engineering company. We don't build models, we orchestrate them to make AI actually useful. As models get better, AIOS gets better.*