# BIOQL – Strategic Partnership & Valuation Brief

Executive Negotiation Summary – October 2025

## 1. Real Valuation & Core Strength

BioQL is a proprietary Natural Language to Quantum Code (NL→QC) compiler built for next-generation drug discovery and CRISPR optimization. The platform integrates six quantum backends (IBM, IonQ, Google, AWS, Azure, Rigetti) and a complete nine-step discovery pipeline powered by the Bio-HNET 4.5B AI model.

• Current Valuation: USD 5–10M pre-money  
• Strategic Value Potential: USD 50–200M  
• Codebase: 56K+ lines, 142 modules, 14 core systems  
• Gross Margin: 99% (SaaS model)  
• IP Portfolio: 3–5 patentable modules (Quantum algorithms + CRISPR-QAI)  
• Replacement Cost: > USD 3M in R&D and compute value

## 2. Growth & Commercialization Outlook

BioQL is transitioning from validation to rapid scale-up, following a clear roadmap toward a $1B+ valuation within 3–5 years.

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| Timeline | Key Milestone | Projected ARR | Valuation Range (10–25x ARR) |
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| 12 months | 50 clients | $1.2M | $12–30M |
| 24 months | 300 clients | $12M | $120–300M |
| 36 months | 1,200 clients | $90M | $900M–2.25B |

## 3. Expected Role of InoSwift Venture Studio

InoSwift’s participation is positioned as that of a strategic accelerator and venture catalyst, not as a controlling acquirer. Their contribution should combine capital, network, and institutional reach to accelerate BioQL’s growth.

• Upfront Technology & Equity Participation: USD 250,000 (cash) for a 20% strategic equity stake in BioQL.  
• Capital Acceleration Commitment: InoSwift will actively introduce and onboard institutional investors to raise an additional USD 1.0–1.5M within six months of closing.  
• Valuation Baseline: No equity dilution below a USD 10M pre-money valuation.  
• Equity Reversion Clause: If the additional capital commitment is not met, InoSwift’s equity automatically adjusts to 5%.

## 4. Partnership Framework

1. Spectrix retains 80% ownership and full control of the BioQL IP.  
2. InoSwift holds a 20% strategic equity stake, contingent upon the capital acceleration clause.  
3. All future transactions, licensing, or exits must reference the USD 5–10M valuation baseline.  
4. The USD 350K total cash commitment (USD 250K upfront + USD 100K in follow-up support) ensures strategic alignment and fair compensation for access and acceleration.

## 5. Conclusion

BioQL is one of the most advanced and commercially validated Quantum-AI platforms in biotechnology, representing a breakthrough in language-to-quantum computation for drug discovery. InoSwift’s participation should begin with a USD 250K upfront contribution, tied to performance-based milestones, establishing a balanced and strategic foundation for long-term collaboration, scale, and value creation.