Tokfluence

July 2025 - Investment Analysis

Google Search Console Analysis

Metric	Value / Trend	Comments
12-mo Clicks	150,000	Long-term organic, not just viral
12-mo Impressions	3.99 million	High visibility
Avg. CTR	3.8%	Could be improved
Avg. Position	11.1	Close to page 1, upside potential
Top Pages	Country influencer lists	Commercial intent, product focus
Top Countries	India, US, UK, Nigeria, Germany	Global reach
3-mo Trend	Clicks ↓13%, Impr. ↑22%	More shown, but less clicked
Seasonal Spikes	Jan, Jun	Normal, no sign of penalty
Manual Actions	Unknown	Please confirm in GSC
Traffic Risks	Heavy reliance on "top influencer" pages; more competition?	

GSC Analysis Summary

- **Strengths**: Real organic reach, international interest, core product pages drive most search traffic, not just blog posts.

- **Risks**: Traffic highly dependent on a narrow set of search intents (mostly "top influencers in X country"). Recent dip in clicks suggests increasing competition or ranking losses for those terms.

- **Upside**: If you can improve rankings slightly, CTR and traffic could increase meaningfully (even moving from #11 to #8 can double traffic for key terms).

- **Due Diligence:** Make sure there are no manual actions in GSC. Check if your competitor landscape for these queries has changed.

Google Analytics - Metrics Analysis

Metric	Value / Trend	Comments
Total Users (12mo)	150,858	Strong top-of-funnel
Organic Search %	80%	Very SEO dependent
Engagement Rate (Overall)	14.7%	Low for SaaS
Conversion to Registration	1.4%–4.6%	Needs work
Monetization in GA	$0	Not tracked here
Most Popular Page	/top (85%+ views)	Product/feature traffic
Risk Areas	Low engagement, low conversion, SEO-dependent	

➔ **Consider adding better CTAs, offers, or content gating** to turn traffic into leads.

Google Analytics - SWOT Analysis

Strength	Weaknesses
Strong SEO presence: 80% of all traffic from organic search. **Decent direct traffic** for a SaaS of this stage. **Traffic is well-targeted:** They land on product pages, not just blog posts.	**Extremely low engagement:** Most sessions have 0–2 seconds of "engagement." This suggests either technical tracking issues (GA4 sometimes underreports engagement on single-page apps) or users bouncing quickly after getting what they want (list of influencers). **Conversion events are rare:** Register button click, sign up, etc. are *very* low vs. total sessions/users. **Conversion rate from visitor → signup appears very low (1–4%)**. - Traffic alone does not = revenue!
Opportunities	**Threats**
Improve conversion: More prominent CTAs, better lead magnets, onboarding, and re-engagement for the massive SEO traffic. **Increase time on site:** Add features, interactivity, or unique data to keep people from bouncing. **Add more diversified acquisition (referral/social):** Right now, almost all eggs are in one SEO basket.	**Heavy dependence on one content type:** If "/top" pages ever drop in search, site traffic collapses.

Chart Mogul - Analysis Summary

Metric	Value (Range)	Interpretation / Comment
Avg MRR (12mo)	~$2,100–$2,400	Low, but stable recurring SaaS revenue
Active Paying Users	~24–26	Consistent, but small base
ARPU	$80–$99	Reflects $99 plan, some on discounted tiers
Churn Rate	13–20% (monthly)	High for SaaS; opportunity to improve
LTV	$575–$663	Consistent with ARPU/churn math
Net MRR Retention	80–93%	Should be higher for sustainable SaaS growth
Revenue Concentration	Low	Revenue diversified, no big customer risk

Chart Mogul - SWOT Analysis

Strength	Weaknesses
- True SaaS, 100% recurring revenue. - ARPU is healthy for B2B micro-SaaS. - No customer concentration risk. - Data matches self-service, international audience.	**Very high churn**—most SaaS buyers will see this as a *major* issue. Likely caused by low switching costs, low stickiness, or traffic not matching best-fit users. **Growth is flat:** New users barely keep pace with churned users. **MRR** is steady, but not growing.
Opportunities	**Threats**
Drastically improve retention (churn reduction): even small improvements will boost LTV and valuation. **Increase free→paid conversion** (very low now). **Consider expanding plans,** annual deals, or sticky features to boost net retention.	

Valuation Analysis

3. Valuation Math for Tokfluence

Base Case (Market Standard)

- **Low Churn, Growing SaaS:** $26,400 x 3 = **$79,200**
- **Flat, High-Churn SaaS (like yours):** $26,400 x 1.3 to 1.8 = **$34,320 to $47,520**

My Recommendation (Realistic, Marketable Price)

- **Fair market price: $35,000–$45,000 USD**

This reflects:

- Current recurring revenue, but applies a modest multiple due to churn and flat growth.
- This is a *reasonable* price range for micro-SaaS with your metrics, in the open market (e.g., MicroAcquire, FE International, private buyers).

Dani - SWOT Analysis

| Strength	Weaknesses
• Existing customer base and email list: How many? • Good in-page SEO • Good keyword positioning: 4 strong keywords in first position	• Current value proposition is a bit weak, as anyone can connect to a scraping API, it's basically and advanced filtering tool for tiktok , no real competitive advantage on the product (Free tool on the competition website: https://www.upfluence.com/find-tiktok-influencers-free?utm_source=organic&utm_campaign=direct • Need to Change stack • Need to pay for a scraping tool (250$/month)
Opportunities	**Threats**
• Opportunity for Product growth • We search and contact influencers for them • Do the tinyadz.com of influencer marketing • RAG search • Analytics & trends • Campaign creator tool (We do the distribution and display results back) • Amazon marketing • Pay and send products to influencers through tokfluence • Opportunity for programmatic SEO	• 50+ percent of the traffic is form india with 98% bounce rate • High competition • High Churn • Migrating to a new tech stack could affect SEO

Think of a price and make discounts / premium

- No due diligence process
- Input of founders selling the product
- Honest and trustworthy
- Calculate a rate of return if we invest without making any adjustments

Valuation discussion

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Valuation discussion

MRR over the last 12 months
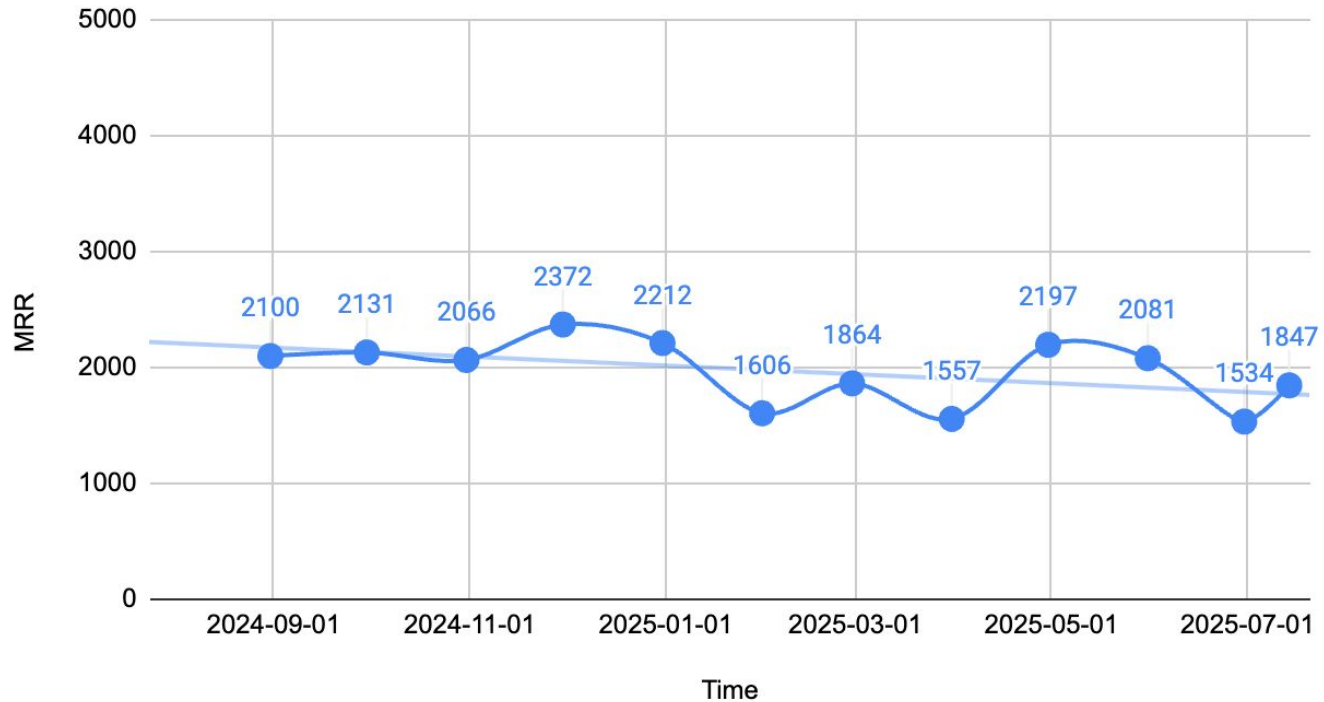
Valuation Multiple

Growing, sticky SaaS: **3–5x ARR**

Small, stable but high-churn SaaS: **1–2.5x ARR**

Red flags (high churn, flat or declining MRR): **1–1.8x ARR** (sometimes lower)

	Average MRR	ARR	Multiple	Valuation
Last 3 months	$1,742	$20,908	2	$41,816
Last 6 months	$1,844	$22,124	2	$44,248
Last 12 months	$1,955	$23,458	2	$46,916

Dani's offer Proposal

We really like the product — there's real value in the recurring revenue and strong SEO presence.

However, with MRR currently around $1.8K, and considering the past decline, churn, and the effort needed to grow, stabilize revenue and fix potential technical debt we feel $35K is a fair offer.

It's a straightforward, clean deal that reflects where things stand today, while giving us some room to invest in improving retention and growth.

That said, we're serious about this — if performance starts trending up in the next month, we're open to getting closer to $40K.

Questions

1. **Review product onboarding, sign up, and value prop**: Are people dropping off because they're not finding what they need, or is it friction in signup?
2. On a une idée de pourquoi les gens churn autant?
3. Quels sont les coûts aujourd'hui?
4. Est-ce qu'on connait le nombre de free users?
5. Quelles sont les opportunités de croissance que vous voyez?
6. Quel profil serait un bon acheteur selon vous?
7. On a vu que 1 client est membre depuis 2021 et un autre depuis 2024 (1an). Surement des oublis de cancel le compte?
8. What can you tell us about the current competition landscape?

TECH

9. What is the current tech stack
10. Do you see any risk regarding data sourcing and Tiktok?

Points à adresser:

- Dépendance sur le SEO:
- High-churn? → Comment améliorer ça
- Free VS Paid subscribers. Are there opportunities here?