The Venture Lab

We manufacture proprietary deal flow.

We don't compete for deals. We create them.

Pre-Beta Investment Round | $200,000 | February 2026

Confidential | Prepared for Angel Investors & Early-Stage VCs

What Business Are We In?

We are in the business of manufacturing proprietary deal flow.

Traditional venture capital is a game of access and guesswork. VCs spend millions sourcing deals, and still pick wrong 90% of the time. APEX OS transforms this into a science. We have constructed a system that systematically identifies, cultivates, and invests in elite AI-native companies **before they ever appear on the open market**.

COMPONENT 1 | SAAS REVENUE ENGINE

The Foundry

A high-margin subscription platform that attracts thousands of aspiring AI builders. It is not an education business. It is a **sophisticated filtering mechanism** that surfaces the top 1% of talent and ideas while generating recurring SaaS revenue at 85% gross margins.

COMPONENT 2 | VENTURE CAPITAL ENGINE

The Fund

A 30-day intensive accelerator that invests in the elite companies born from our Foundry. 15% equity stake. **Zero deal sourcing cost.** We have already observed and measured every founder's capabilities before we invest a single dollar.

In one sentence: We are a venture capital firm that has solved its own deal flow problem.

Venture Capital is Broken

The VC model has a fundamental structural flaw: deal sourcing is expensive, subjective, and inefficient. Firms spend millions on sourcing, rely on warm introductions, and still pick wrong the vast majority of the time. Meanwhile, the best founders are invisible because they cannot afford to be seen.

92%	**$50K+**	**90%**
Startup Failure Rate	Avg. VC Deal Sourcing Cost	VC Investments That Fail

The Opportunity: What if you could observe a founder's actual capabilities before investing? What if deal flow was not sourced, but manufactured? That is what APEX OS does.

32,000 Paying Customers.
The Raw Material for Our Lab.

Through an exclusive partnership with InfoAcademy, we have access to 32,000 paying customers who have already invested in their technical education. This is the raw material for our Venture Lab: a captive pipeline of aspiring builders that we can systematically filter, cultivate, and invest in.

The Venture Lab Pipeline

32,000 enter the Foundry	Attracted by low-cost, high-value AI education
~1,600 show high potential	Identified through proprietary scoring algorithms
~80 enter the Fund	Top 5% invited to 30-day intensive accelerator
~8 receive investment	Elite companies with proven builders and validated ideas

$0

Deal Sourcing Cost

32,000

Pre-Qualified Pipeline

Day 1

Revenue Generation

A SaaS Business That Prints
Revenue and Deal Flow.

The Foundry is our subscription platform where builders learn AI-native development. But its true purpose is twofold: it generates high-margin recurring revenue **and** it systematically identifies the top 1% of talent for our Fund.

CODESPRINT
$89/mo
Emerging Market Entry

6-module AI-native curriculum, community access, project templates. Designed for high-volume intake from emerging markets.

BUILDER LAB
$149/mo
Momentum Tier

Everything in CodeSprint plus live workshops, AI agent access, and builder leaderboard. Our core revenue driver.

FOUNDER TRACK
$249/mo
High-Intent Builders

Everything in Builder Lab plus 1:1 mentorship, pitch preparation, and priority access to the Fund. Our talent filter.

85%
Gross Margin

$149
Blended ARPU

$0
CAC

9.8:1
LTV:CAC

Low Entry Barrier =
Our Greatest Strategic Weapon

Our low price point is deliberate. It maximises intake volume into our Foundry, which maximises the quality of deal flow into our Fund. The moats that protect us are structural.

1. The Distribution Moat

32,000 paying customers cannot be copied. A competitor must spend $500K-$2M and 18+ months to build an equivalent pipeline. By then, we will have converted ours and moved to Phase 2.

2. The Data Moat

Every builder interaction generates proprietary data on talent quality, project viability, and orchestration patterns. With 1,000+ users, we will have pattern libraries no competitor can replicate. Data compounds. The gap widens every month.

3. The Community Moat

Communities are the hardest moat to replicate. Our builders form peer networks, accountability groups, and co-founder matches. Switching costs become emotional, not just financial. You can copy features; you cannot copy belonging.

4. The Ecosystem Lock-in

Foundry graduates feed the Fund. Fund companies generate B2B licensing revenue. B2B revenue funds Foundry growth. A competitor must replicate all three simultaneously to compete. Nobody does that.

The Bottom Line: Anyone can build a course. Nobody can replicate 32K customers + proprietary data + a living community + a venture pipeline + an 18-month head start. That is our moat.

We Don't Compete on Features.
We Compete on Ecosystem.

	Bootcamps	MOOCs	Accelerators	APEX OS
Price	$15,000+	$0-$50/mo	Free (takes equity)	$89-$249/mo
Deal Sourcing	None	None	$50K+ per deal	$0 (built-in)
Completion Rate	15%	6%	N/A	78% (projected)
Time to Revenue	6-12 months	Never	3-6 months	30 days
Data Moat	None	None	None	Proprietary patterns
Community	Cohort-only	None	Small batch	32,000+ network
Revenue Model	One-time	Ads/Certs	Equity only	SaaS + Equity + B2B

Key Insight: Competitors optimise one dimension. APEX OS is the only player that combines a SaaS revenue engine with a venture capital pipeline and enterprise licensing into a single Venture Lab.

A $420B Convergence

Three massive markets are converging: online education, no-code tools, and AI development. APEX OS sits at the intersection, capturing value from all three.

TOTAL ADDRESSABLE MARKET

$420B

Online Education ($350B) + No-Code Tools ($45B) + AI Development ($25B)

SERVICEABLE ADDRESSABLE MARKET

$50B

5M+ aspiring builders willing to pay for AI-native education and tools globally.

SERVICEABLE OBTAINABLE MARKET

$2.8M

Year 1 target: 1,000 builders at $149 ARPU. Conservative 0.2% of SAM.

Why Now: The Convergence of Three Forces

1. AI Capability: Claude, GPT-4, Gemini can now handle complex development tasks end-to-end.

2. Builder Desire: Post-pandemic shift toward entrepreneurship and independent work.

3. VC Inefficiency: Traditional deal sourcing is broken; the market is ready for a new model.

A Surgical Strike,
Not a Hopeful Prayer.

PHASE 1 | Months 1-3

Activate the 32,000

Direct conversion of our captive InfoAcademy audience through targeted email sequences, exclusive webinars, and early-access offers. Target: 100 paying builders in the Foundry.

PHASE 2 | Months 4-9

Ignite the Flywheel

Viral 'Show Me The Pitch' campaign incentivizes builders to share projects. Community-led growth through builder leaderboards and peer referrals. Target: 300 builders.

PHASE 3 | Months 10-12

Launch the Fund

First Accelerator cohort from top Foundry graduates. Enterprise pilot conversations. Validate the full Venture Lab model end-to-end. Target: Series A ready.

The Numbers That Matter

$149	$0	85%	9.8:1
Blended ARPU / Month	Deal Sourcing Cost	Gross Margin	LTV:CAC Ratio

Three Strategic Scenarios (18-Month Horizon)

Scenario	M18 Builders	Conversion	M18 ARR	Net Cash Flow
Bear Case	201	0.6%	$434K	-$12K/mo
Base Case	551	1.7%	$1.48M	+$48K/mo
Bull Case	1,542	4.8%	$5.0M	+$180K/mo

Note: These figures represent Foundry (SaaS) revenue only. Fund returns from equity stakes in portfolio companies represent additional upside not modelled here.

Vision Meets Execution

FOUNDER & CEO

Nicolae Fratila

Technical architect with proven AI-native development velocity. Built the complete APEX OS infrastructure in 10 days, demonstrating systems thinking at scale and product-market fit intuition. Founder of InfoAcademy with 32,000+ paying customers.

STRATEGIC ADVISOR

Kevin Obeegadoo

30+ years consulting experience. Unreasonable Impact UK & Europe 2025 Mentor. Advised 14+ Unreasonable companies. Expertise in business strategy, risk mitigation, securitisation, and global scaling from Mauritius IFC.

Equity Architecture

Founders	~67%	Vision, technical execution, majority control
Seed Investors	15%	$1.2M capital injection, strategic guidance
InfoAcademy	10%	Distribution infrastructure, 32K customer asset
Strategic Advisory	3-5%	Global expansion & fundraising
Builder Pool	5%	Co-founder equity for sprint graduates

$200,000

Pre-Beta Investment Round

Use of Funds

Foundry Platform 50% | $100,000

Community & Marketing 30% | $60,000

Operations & Legal 20% | $40,000

12-Month Milestones

Month 3   100 builders in Foundry, $10K MRR

Month 6   First Fund cohort launched

Month 9   300 builders, $30K MRR

Month 12   Series A ready, first portfolio exit path

What This Investment Enables

This $200K activates our 32,000-strong pipeline, validates the Foundry-to-Fund model, and positions APEX OS for a $1.2M+ seed round within 12 months.

Why It Won't Break

Market Risk

What if the AI market doesn't grow?

The market is already $420B and growing at 15%+ CAGR. AI adoption is accelerating, not decelerating. Our 32,000 existing customers prove demand exists today.

Competition Risk

What if 30 competitors copy our model?

They can copy the model, but not the 32,000-customer pipeline, the proprietary data from thousands of builder interactions, or the 18-month head start. Our moat is multi-layered.

Technology Risk

What if the AI tools we teach become obsolete?

We teach orchestration principles, not specific tool syntax. Our curriculum evolves with the technology. We are tool-agnostic by design.

Execution Risk

What if we can't convert the pipeline?

Even our bear case (0.6% conversion) generates $434K ARR. We need less than 1% conversion to be viable. The risk is asymmetrically in our favor.

The Lab is Built.
The Pipeline is Waiting.
The Time is Now.

Nicolae Fratila | Founder & CEO

Kevin Obeegadoo | Strategic Advisor

infoacademy.uk