

# The Economic Engine for the AI-First Economy

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

Confidential | Prepared for Angel Investors & Early-Stage VCs

# The Startup Graveyard

The startup ecosystem destroys value at an industrial scale. Founders burn years and millions before finding product-market fit. Traditional education is extractive, accelerators are slow, and customer acquisition costs kill more companies than bad products ever will.

**92%**

Startup Failure Rate

**\$2.5M**

Avg. Capital Burned Before Revenue

**18-24mo**

Avg. Time to Product-Market Fit

**The Root Cause:** \$50B+ in founder value destroyed annually due to lack of systematic support infrastructure.

# 32,000 Paying Customers. Zero Acquisition Cost.

Through an exclusive partnership with InfoAcademy, we have access to 32,000 paying customers who have already invested in their technical education. This is not a lead list. It is a captive distribution network that eliminates the single biggest risk in any startup: customer acquisition.

\$0

Customer Acquisition Cost

3-5x

Higher Conversion vs. Cold Outreach

Day 1

Revenue Generation

## Lead Quality Distribution

<b>Hot (Score 140-170)</b>	1,280	4%	Immediate conversion
<b>Warm (Score 100-139)</b>	6,400	20%	30-day nurture
<b>Cold (Score 60-99)</b>	12,800	40%	90-day content sequence
<b>Unqualified (&lt;60)</b>	11,520	36%	Filter / remove

# An Economic Engine, Not a Product.

APEX OS is a self-sustaining economic engine that transforms education into a high-margin talent pipeline, which feeds a venture accelerator with proprietary deal flow. We capture value at every stage of the builder's journey.

TIER 1 | SAAS

## APEX Academy

High-margin, recurring subscription revenue from builders learning our AI-native methodology. 85% gross margins. Tiered pricing from \$89-\$249/month.

TIER 2 | VENTURE

## APEX Accelerator

30-day intensive sprint for top 5% of Academy graduates. 15% equity stake. Proprietary deal flow at zero acquisition cost. High-upside portfolio.

TIER 3 | ENTERPRISE

## B2B Licensing

Proprietary AI orchestration patterns licensed to enterprises. Long-term, high-value contracts. The 'Intel Inside' of AI development.

# Low Entry Barrier = Our Greatest Strategic Weapon

Investors ask: "If the barrier to entry is low, what stops competitors?" The answer: the barriers that protect **us** are structural, compounding, and invisible.

## 1. The Distribution Moat

32,000 paying customers cannot be copied. A competitor must spend \$500K-\$2M to build an equivalent list. By the time they do, we will have converted ours and moved to Phase 2. This is an 18-month head start that money alone cannot buy.

## 2. The Data Flywheel Moat

Every builder interaction generates proprietary orchestration data. With 1,000+ users, we will have pattern libraries no competitor can replicate without equivalent scale. Data compounds. The gap widens every month.

## 3. The Community & Brand 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 Moat

Academy graduates feed the Accelerator. Accelerator companies license B2B patterns. B2B revenue funds Academy growth. This self-reinforcing loop means a competitor must replicate all three tiers 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 three-tier economic engine + an 18-month head start. That is our moat.

# We Don't Compete on Features.

## We Compete on Ecosystem.

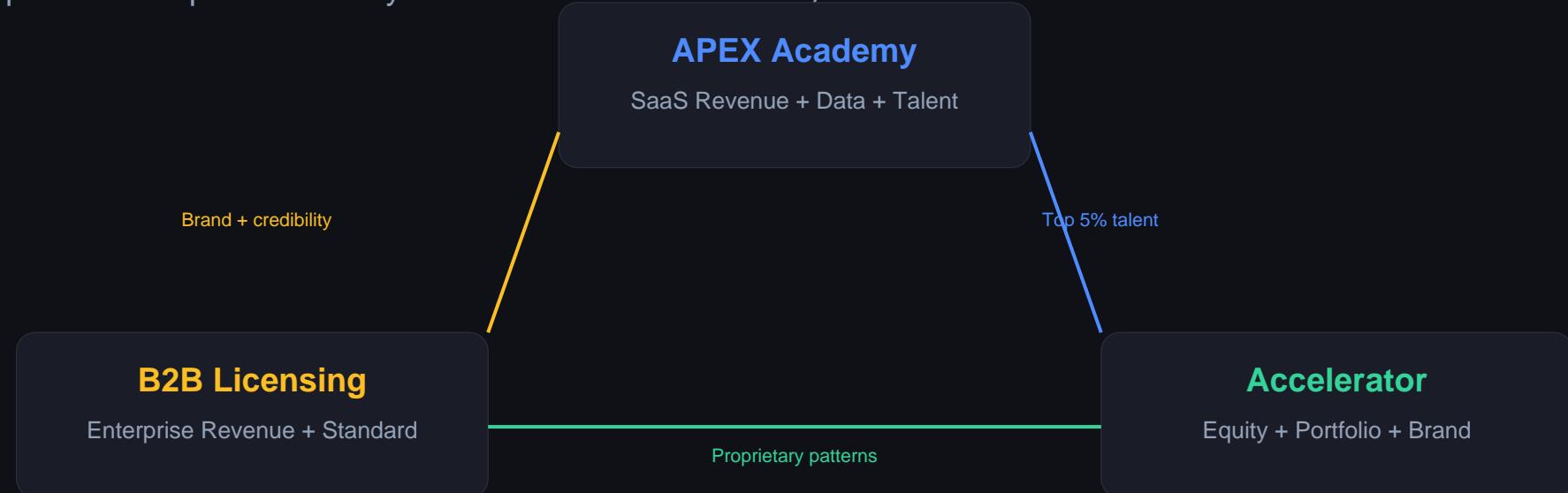
	Bootcamps	MOOCs	Accelerators	APEX OS
<b>Price</b>	\$15,000+	\$0-\$50/mo	Free (takes equity)	\$89-\$249/mo
<b>Completion Rate</b>	15%	6%	N/A	78% (projected)
<b>Time to Revenue</b>	6-12 months	Never	3-6 months	30 days
<b>CAC</b>	\$500-\$2,000	\$50-\$200	\$0 (takes 7-10%)	\$0
<b>Community</b>	Cohort-only	None	Small batch	32,000+ network
<b>Data Moat</b>	None	None	None	Proprietary patterns
<b>Revenue Model</b>	One-time	Ads/Certs	Equity	SaaS + Equity + B2B

**Key Insight:**

Competitors optimise one dimension. APEX OS is the only player that combines SaaS education, venture acceleration, and enterprise licensing into a single, self-reinforcing ecosystem.

# The Virtuous Cycle

Each tier of our ecosystem reinforces the others, creating compounding value that is extremely difficult for competitors to replicate. The flywheel accelerates with every new user.



**85%**

Gross Margin

**\$0**

Customer Acquisition Cost

**9.8:1**

LTV:CAC Ratio

**15%**

Accelerator Equity

# 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. Distribution Collapse:** Traditional education is being disrupted; first-mover advantage is everything.

# 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.

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

## Solidify the Moat

Strategic partnerships with AI communities, influencers, and educational institutions. Launch first Accelerator cohort. Enterprise pilot conversations. Target: Series A ready.

# The Numbers That Matter

\$149

Blended ARPU / Month

\$0

Customer Acquisition Cost

85%

Gross Margin

9.8:1

LTV:CAC Ratio

## Three Strategic Scenarios (18-Month Horizon)

Scenario	M18 Customers	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

## Pricing Architecture (PPP-Optimized)

CodeSprint

\$89/mo

Emerging Market Entry

Builder Lab

\$149/mo

Momentum Tier

Founder Track

\$249/mo

High-Intent Builders

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

# \$200,000

## Pre-Beta Investment Round

### Use of Funds

Platform & Curriculum 50% | \$100,000

Community & Marketing 30% | \$60,000

Operations & Legal 20% | \$40,000

### 12-Month Milestones

**Month 3** 100 builders, \$10K MRR

**Month 6** First Accelerator cohort launched

**Month 9** 300 builders, \$30K MRR

**Month 12** Series A ready, first portfolio company

### What This Investment Enables

This \$200K catalyzes the activation of our 32,000-strong distribution network, validates the three-tiered business 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 education 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 distribution network, 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 lead list?*

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 Infrastructure is Built. The Customers are Waiting. The Time is Now.

Nicolae Fratila | Founder & CEO

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