

# BURCH-EIDOLON Investment Brief: Mira Gear

## Executive Snapshot

Category: Consumer Tech  
Region: Southeast Asia  
Heat: 98.0 | Risk: 27.4 | Asymmetry: 58.8  
Revenue (P10/P50/P90): \$51.9M / \$80.9M / \$111.1M  
Capital required: \$12.9M  
Deeper analysis trigger (Heat >= 75): ON

## Investment Thesis

Mira Gear shows heat 98.0, asymmetry 58.8, and risk 27.4. Revenue midpoint is \$80.9M with capital requirement around \$12.9M. Suggested structure: IP partnership targeting 20%-35%. Current production model is hybrid model (contract manufacturing plus controlled finishing/assembly) with 3.5% to 7.0% cost-down potential from the lead procurement lever.

## Deal Structuring Engine

Suggested entry strategy: IP partnership  
Suggested ownership target: 20%-35%  
Estimated capital required: \$12.9M

Mira Gear appears founder-led with a high-urgency opportunity to align on growth while preserving brand voice. Anchor around safeguarding creative control, improving operating cadence, and using capital against the highest-friction constraint (risk=27.4, asymmetry=58.8).

## Production Options + Cost-Down Plan

Current production model: Hybrid model (contract manufacturing plus controlled finishing/assembly)  
Unit economics pressure: moderate-to-high  
Primary bottleneck: limited procurement leverage at current scale

- Strategic Contract Rebid: est. savings 5.5% | capex delta \$0.4M | time-to-impact 3 months | risk low
- Hybrid Regionalization: est. savings 7.4% | capex delta \$1.4M | time-to-impact 6 months | risk medium
- SKU + Packaging Simplification: est. savings 6.3% | capex delta \$0.2M | time-to-impact 4 months | risk low
- Supplier portfolio rebalance: 3.5% to 7.0% potential savings (procurement, confidence 0.80)
- Freight + fulfillment lane optimization: 2.0% to 4.3% potential savings (logistics, confidence 0.75)
- SKU and packaging architecture cleanup: 2.4% to 4.7% potential savings (product mix, confidence 0.78)

## Engagement Breakdown

Comments/Likes ratio: 0.155  
Repeat commenter density: 0.920  
UGC depth: 80.7 | Sentiment: 76.7

## Financial Inference Model

Traffic estimate: 18397.6k visits/mo  
Conversion assumption: 2.62%  
AOV: \$168.00 | SKU estimate: 168  
Sell-through assumption: 77.0%  
Gross margin estimate: 40.1%  
CAC proxy: \$107.5 | LTV proxy: \$579.9

- High Revenue with Operational Inefficiency

## Risk + Resilience Scan

Trademark strength: strong  
Corporate registry verified: yes  
Platform dependency: low  
Algorithm exposure: high  
Supplier concentration: medium  
Founder dependency score: 50.3

- No active litigation flags detected in available public signals.
- Platform dependency risk is low.
- Algorithm exposure risk is high.
- Supplier concentration risk is medium.

## Structured Outreach Draft

Subject: Mira Gear growth partnership discussion\n\nHi [Founder Name],\n\nWe've been tracking Mira Gear's acceleration and see strong potential to support the next phase of growth. Our initial view is a ip partnership with a target stake of 20%-35% and about \$12.9M of growth capital.\n\nIf helpful, we can share a concise operating blueprint covering supply-chain resilience, COGS reduction levers, and scenario-tested downside protections.\n\nWould you be open to a short intro call next week?\n\nBest,\nBURCH-EIDOLON

## Grounding Alignment

Grounded in: DEAL FLOW ENGINE - Brand Intelligence & Deal Sourcing Engine v1.1  
Workflow anchor: Use the workflow: Cultural signal -> Engagement analysis -> Financial inference -> Risk scan -> Structured outreach.

- Prioritize acceleration and rate-of-change over absolute scale.
- Use the workflow: Cultural signal -> Engagement analysis -> Financial inference -> Risk scan -> Structured outreach.

- Rank a weekly universe and generate deeper analysis for top opportunities.
- Combine cultural heat and financial asymmetry with explicit risk scanning.
- Generate structured recommendations and outreach-ready theses.

## **Key Evidence**

- Mira Gear signal #3 (public\_registry)
- Mira Gear signal #4 (news)
- Mira Gear signal #1 (searxng)
- Mira Gear signal #2 (reddit)
- Mira Gear signal #5 (searxng)