

Ugoki

COMPREHENSIVE BUSINESS PLAN

Integrated Wellness & Human Performance
Optimisation Platform

Market Opportunity: £11.27B global wellness app market

Growth Rate: 14.9% CAGR through 2030

Target: Busy professionals aged 25-60

Funding: £525,000 seed round

Break-even: Month 14

MVP Status: Backend & Mobile 90%+ Complete

Prepared: January 2026
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COMPREHENSIVE BUSINESS PLAN

Integrated Wellness & Performance Optimization Platform

EXECUTIVE SUMMARY

Business Concept

Our mobile wellness platform represents a revolutionary approach to health optimization for busy professionals. By integrating four core pillars—Intermittent Fasting (IF), High-Intensity Interval Training (HIIT), personalized nutrition, and community engagement—we deliver a comprehensive solution that addresses the modern professional's struggle to maintain health while managing demanding schedules.

Unlike competitors who focus on single aspects of wellness, our platform leverages AI-driven analytics to create a holistic, personalized health ecosystem. Users can optimize their well-being in as little as 15-25 minutes per day, achieving measurable improvements in energy, mental clarity, and physical performance without sacrificing precious time with family or disrupting career momentum.

- Save time (automation, efficiency)
- Save money (health ROI)
- Certainty (analytics, reporting)
- Simplicity (easy setup)
- Growth (feel and see results)

Target Market

Our primary market consists of professionals aged 20-60 with limited daily availability but strong appreciation for physical wellness. These individuals, exemplified by busy managers like Arthur (35) and senior executives like Eleanore (42), seek efficient, science-backed solutions that integrate seamlessly with hectic schedules.

Market Size [Illustrative]:

- Global wellness apps market: USD \$11.27 billion (2024), projected USD \$26.19 billion by 2030
- UK fitness/wellness market: £21.4 billion (2018), growing to £22.8 billion (2020)
- UK fitness app market specifically: £1.35 billion (2023), projected £10.12 billion by 2035
- Total addressable market: 10 million gym memberships in UK alone, 14.9% penetration rate

- London boutique fitness market: 278 studios offering 15,806 classes weekly, serving 9,629 concurrent users

Value Proposition

We save busy professionals 10-15 hours per week while delivering superior health outcomes by:

- **Eliminating Traditional Constraints:** No gym membership, no personal trainer, no meal prep services
- **Optimizing Time:** 15-25 minute HIIT sessions replace 90-minute gym visits
- **Personalizing Approaches:** AI-driven recommendations based on body type, schedule, and goals
- **Building Community:** Social features create accountability and motivation
- **Delivering Results:** Science-backed protocols for weight loss, energy enhancement, mental clarity, and longevity

Financial Projections [Illustrative - Updated]

Year 1-3 Highlights:

- Year 1 Revenue: £450,000 (3,000 paid subscribers at £12.99/month)
- Year 2 Revenue: £1,620,000 (10,000 paid subscribers)
- Year 3 Revenue: £3,894,000 (25,000 paid subscribers)
- Gross Margin: 75-80% (typical for SaaS/mobile app business model)
- Break-even: Month 14
- Projected 5-year valuation: £15-20 million

Funding Requirements [Illustrative]

Seeking £525,000 seed investment to fund:

Category	Amount	% of Total
Product development	£75,000	14%
Marketing & customer acquisition	£275,000	52%
Operations & team building	£125,000	24%
Working capital & contingency	£50,000	10%
TOTAL	£525,000	100%

MVP Development Status - SIGNIFICANT PROGRESS

The following components are already built and operational, significantly reducing time-to-market and development risk:

- ✓ **Backend Infrastructure (95% Complete):** Python FastAPI, SQLAlchemy, PostgreSQL-ready, full async architecture
- ✓ **AI Coach Integration (100% Complete):** Pydantic AI framework with Claude 3.5 Sonnet integration and Logfire observability
- ✓ **Core Modules (90% Complete):**
 - IDENTITY - Authentication & authorization system
 - TIME_KEEPER - Fasting and workout timers

- METRICS - Weight tracking, biomarker storage, trend analysis
- PROGRESSION - Streaks, XP, levels, achievements
- CONTENT - Workout library structure
- NOTIFICATION - Push notification framework
- AI_COACH - Personalized coaching with Claude

✓ **Database Architecture (100% Complete):** Full schema with migrations via Alembic

✓ **Mobile App Framework (90% Complete):** Expo React Native structure, navigation, state management with Zustand, UI/UX design implemented, core screens built

■ **Remaining Work:** Workout video integration, push notifications, final testing and deployment

Return on Investment [Illustrative]

Based on comparable wellness app exits and market multiples:

- Target exit valuation: £15-20 million (Year 5)
- Projected investor return: 29-38x on seed investment
- Industry comparables: Noom (\$3.7B valuation), MyFitnessPal (\$475M acquisition), Calm (\$2B valuation)

Product Development Budget

Detailed Cost Breakdown - £75,000

Component	Budget	Status
Backend deployment & optimization	£20,000	95% complete, production-ready
Mobile app completion	£15,000	90% complete, UI/UX done
AI/ML optimization	£10,000	Fully integrated, needs tuning
QA, testing & security audits	£30,000	Comprehensive testing required
TOTAL	£75,000	Minimal work to launch

Backend Infrastructure - £20,000

Current Status (95% Complete):

- Full FastAPI REST API with async/await
- SQLAlchemy 2.0 ORM with complete data models
- Alembic migrations system
- Modular black-box architecture (IDENTITY, TIME_KEEPER, METRICS, PROGRESSION, CONTENT, AI_COACH)
- Authentication & authorization framework
- Database schema for users, metrics, fasts, workouts, achievements
- AI coach integration with Claude API

Remaining Work (£20,000):

- Production deployment to Fly.io/Railway (£5,000)
- Environment configuration and secrets management (£3,000)
- Performance optimization and load testing (£7,000)
- Production monitoring setup (Sentry, Logfire) (£5,000)

Mobile App Development - £15,000

Current Status (90% Complete):

- Expo React Native project setup
- Expo Router navigation structure
- Zustand state management configuration
- TanStack Query for API integration
- TypeScript configuration
- Component architecture and folder structure
- UI/UX design implementation with Tamagui/NativeWind
- Screen development (Login, Dashboard, Fasting Timer, Workouts, Profile)

Remaining Work (£15,000):

- Workout video player integration (£8,000)
- Push notification setup (£4,000)
- iOS and Android final testing and optimization (£3,000)

AI/ML Implementation - £10,000

Current Status (100% Integrated):

- Pydantic AI framework integration
- Claude 3.5 Sonnet API connection
- AI coach module with context management
- Logfire observability for AI monitoring
- Structured output parsing
- Conversation memory system

Remaining Work (£10,000):

- Prompt engineering and optimization (£4,000)
- Additional AI features (meal planning, workout recommendations) (£4,000)
- Testing and quality assurance for AI responses (£2,000)

QA & Testing - £30,000

- End-to-end testing (Playwright/Detox) (£10,000)
- Unit and integration testing (£8,000)
- Security testing and penetration testing (£7,000)
- Beta testing program management (£5,000)

Development Timeline

With the MVP substantially complete, we have an accelerated path to market:

Phase	Timeline	Key Deliverables	Status
MVP Development	Complete	Backend, AI, Mobile UI/UX	90% done
Final Polish	Months 1-2	Video player, push notifications, testing	In planning
Beta Launch	Month 2	100 beta users, feedback collection	Q1 2026
Public Launch	Month 3	App Store, Play Store deployment	Q1 2026
Growth Phase	Months 4-9	Marketing campaigns, user scaling	Q2 2026

Break-even	Month 14	Profitability achieved	Q3 2026
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Competitive Advantages

UGOKI's market positioning is strengthened by multiple defensible advantages:

1. Technical Infrastructure Advantage

- Fully operational backend with production-ready architecture
- Complete mobile UI/UX with all core screens built
- Advanced AI integration with Claude 3.5 Sonnet
- Modular black-box design enables rapid feature iteration
- Ready for immediate user acquisition and growth

2. Integrated Four-Pillar Approach

- Only platform combining IF, HIIT, personalized nutrition, and active community
- Competitors typically address 1-2 pillars in isolation
- Backend architecture supports seamless multi-pillar integration
- Holistic approach creates stronger user retention

3. AI-Powered Personalization

- Claude 3.5 Sonnet integration fully operational
- Personalized coaching based on user data and behavior patterns
- Continuous learning and improvement through Logfire monitoring
- Sophisticated AI coach provides competitive moat

4. Time Optimization Focus

- 15-25 minute workouts replace 60-90 minute gym sessions
- Intermittent fasting naturally saves meal prep time
- Direct appeal to busy professional pain points
- Value proposition aligned with target market needs

5. Accelerated Time-to-Market

- Backend proven and tested
- UI/UX design complete and implemented
- Only video integration and notifications remaining
- 2-month path to beta launch
- First-mover advantage in IF+HIIT+AI+Community space

Use of Funds - £525,000

Product Development: £75,000 (14%)

- Backend deployment and optimization: £20,000
- Mobile UI/UX and screens: £0 (COMPLETE)
- Workout video player and content integration: £15,000
- AI prompt engineering and feature expansion: £10,000
- QA, testing, and security audits: £30,000

Marketing & Customer Acquisition: £275,000 (52%)

- Digital advertising (Facebook, Instagram, Google, LinkedIn): £150,000
- Content creation (blog, video, social media): £50,000
- Influencer partnerships: £35,000
- PR and events: £25,000
- Marketing tools and analytics: £15,000

Operations & Team Building: £125,000 (24%)

- Salaries (Marketing Lead, Frontend Developer, Support): £90,000
- Office and administrative: £20,000
- Legal and compliance: £10,000
- Professional services: £5,000

Working Capital & Contingency: £50,000 (10%)

- Cash reserve for 4 months operations: £35,000
- Unforeseen technical or market challenges: £15,000

Risk Mitigation Through Advanced MVP

The advanced MVP state significantly mitigates typical early-stage investment risks:

Technical Execution Risk - Minimized

- Backend architecture proven and operational
- AI integration tested and working with Claude 3.5
- Database schema validated and production-ready
- UI/UX complete with all core screens built
- Only video player and push notifications remain
- 90% of technical complexity already solved

Time-to-Market Risk - Controlled

- Can launch beta in 2 months with working product
- Backend can support users immediately
- UI/UX ready for user testing
- Fast path to revenue generation
- Competitive positioning advantage

Technical Talent Risk - Mitigated

- Core technical expertise embedded in codebase
- UI/UX design and implementation complete
- AI integration complexity already solved
- Need only specialists for video player integration
- Lower dependency on senior engineering talent

Capital Efficiency - Optimized

- £525K budget heavily weighted toward growth (52% marketing)
- Minimal capital allocated to building (14% product)
- Reduced burn rate with accelerated timeline

- Path to profitability in Month 14

Return on Investment

The advanced MVP state creates exceptional value for seed investors:

Why UGOKI is a Compelling Investment

- **Rapid Revenue Generation:** 2-3 month launch timeline enables fast path to revenue
- **Capital Efficiency:** £525K investment achieves full market launch with proven technology
- **De-risked Execution:** Backend + UI proven reduces typical early-stage technical risk
- **Competitive Timing:** First-mover advantage in integrated IF+HIIT+AI space
- **Attractive Returns:** 29-38x projected return multiple on comparable exit valuations

Investment Opportunity Summary

Why Invest in UGOKI Now?

1. Massive Market Opportunity

- £11.27B global wellness app market growing at 14.9% CAGR
- No dominant player in integrated IF+HIIT+AI+Community space
- 85% of population doesn't use traditional fitness facilities
- Post-pandemic sustained shift toward digital wellness solutions

2. De-Risked Technology Platform

- Backend 95% complete and operational
- Mobile UI/UX 90% complete with all core screens
- AI coach integration fully tested with Claude 3.5
- Modular architecture enables rapid iteration
- Minimal remaining technical work to launch

3. Capital Efficient Business Model

- £525K seed funding with clear path to profitability
- 52% of capital allocated to user acquisition and growth
- Only 14% required for product completion
- Break-even projected in Month 14
- High-margin SaaS model (75-80% gross margins)

4. Strong Return Potential

- Projected 29-38x return on seed investment
- Target exit valuation: £15-20M by Year 5
- Comparable exits: Noom (\$3.7B), MyFitnessPal (\$475M), Calm (\$2B)
- Multiple exit pathways (strategic, PE, IPO)

5. Fast Time-to-Market

- Beta launch in 2 months with working product
- Public launch in 3 months
- Immediate user acquisition capability
- First-mover advantage in IF+HIIT+AI+Community category

Investment Terms

Seed Round Size	£525,000
Valuation	£1.9M pre-money, £2.425M post-money
Equity Offered	21.6% (fully diluted)
Security Type	SAFE or Priced Equity Round
Use of Funds	14% Product, 52% Marketing, 24% Operations, 10% Buffer
Minimum Investment	£50,000
Timeline	Rolling close, final close by Q1 2026
Investor Rights	Information rights, pro-rata in Series A

Next Steps

1. **Schedule Due Diligence Session** - Technical demo of working MVP backend and AI coach
2. **Review Financial Model** - Detailed Excel model with sensitivities available
3. **Meet Advisory Team** - Introductions to health, fitness, and technology advisors
4. **Legal & Terms** - SAFE or equity round documentation review
5. **Close Investment** - Wire instructions and cap table finalization

Contact Information

Founder & CEO: [Name]

Email: [Email]

Website: [Website] (Coming Soon)

GitHub (MVP Demo): github.com/linardsb/ugoki-iOS-Android-app

Investment Deck: Available Upon Request

This business plan contains forward-looking statements and projections marked as [Illustrative]. Actual results may differ materially. All market data, financial projections, and competitive analysis should be considered estimates for planning purposes. Investors should conduct independent due diligence before making investment decisions.

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