

# **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:** **< b>Backend & Mobile 90%+ Complete</b>**

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%
<b>&lt;b&gt;TOTAL&lt;/b&gt;</b>	<b>&lt;b&gt;£525,000&lt;/b&gt;</b>	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
<b>TOTAL</b>	<b>£75,000</b>	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	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

<b>Seed Round Size</b>	<b>£525,000</b>
<b>Valuation</b>	£1.9M pre-money, £2.425M post-money
<b>Equity Offered</b>	21.6% (fully diluted)
<b>Security Type</b>	SAFE or Priced Equity Round
<b>Use of Funds</b>	14% Product, 52% Marketing, 24% Operations, 10% Buffer
<b>Minimum Investment</b>	£50,000
<b>Timeline</b>	Rolling close, final close by Q1 2026
<b>Investor Rights</b>	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](https://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.

Document Version: 1.0

Last Updated: January 2026

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