

INVESTMENT MEMO (CONFIDENTIAL)

VERDICT

PASS (NOT READY)

SCORE

15.8 / 45

Executive Summary

The 'Hook' vs 'Anchor'. Use metrics.

Deal Breakers

- Generic wrapper technology with no clear advantage.
- Lack of clear value proposition and unclear target market.
- Zero Signal with no users, no waitlist, and no revenue.

Scorecard

Category	Score
TEAM	2.0/5
PROBLEM	3.5/5
PRODUCT	1.0/5
MARKET	2.0/5
TRACTION	0.0/5
GTM	1.0/5
BUSINESS	1.0/5
VISION	2.0/5
OPERATIONS	1.0/5

Dimension Rationales

TEAM: The team has some relevant experience in AI engineering, but there are several red flags that prevent a higher score.

PROBLEM: The problem statement is clear and concise, but there are some contradictions and risks that need to be addressed.

PRODUCT: The startup's claims are contradicted by forensic evidence, indicating a generic wrapper technology and a lack of clear value proposition.

MARKET: The startup's beachhead is credible, but the expansion plan is unclear and the market is growing, but not explosively.

TRACTION: The startup has a 'Zero Signal' with no users, no waitlist, and no revenue.

GTM: The startup has a generic and unrealistic plan to acquire customers.

BUSINESS: The startup's pricing model is 'Freemium' with a price point of \$0, indicating a lack of clear path to making money.

VISION: The founder's vision is ambitious, but the market analysis reveals a more nuanced reality.

OPERATIONS: The startup's plan is uninvestable due to several critical failures.