

# INVESTMENT MEMO (CONFIDENTIAL)

## VERDICT

PASS (NOT READY)

## SCORE

15.8 / 45

## Executive Summary

This Pre-Seed opportunity presents a 'Hook' of a clear and concise problem statement, but it's weighed down by a critical flaw of a generic and unrealistic plan to acquire customers. The weighted score of 15.8 out of 45 is a major concern, and the primary reason for the verdict is the lack of traction and a clear path to making money.

## Deal Breakers

- The team has a lack of domain expertise and unclear equity split.
- The product is easily replicable and lacks clear differentiation.
- The startup has a '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 lacks domain expertise and has unclear equity split, which raises concerns about their ability to execute the plan.

**PRODUCT:** The product is easily replicable and lacks clear differentiation, which makes it difficult to stand out in a crowded market.

**TRACTION:** The startup has a 'Zero Signal' with no users, no waitlist, and no revenue, which indicates a lack of progress and a high risk of failure.