

INVESTMENT MEMO (CONFIDENTIAL)

IC VERDICT	WEIGHTED SCORE
REVIEW	14.8 / 45

Executive Summary

The 'Hook' (Problem Severity: 3.5) vs the 'Anchor' (Product: 1.0) is a significant mismatch. The startup's product is a generic wrapper around OpenAI with no proprietary data, making it easily replicable.

Deal Breakers

- The team has a domain experience gap, with all founders having only 1 year of experience.
- The product has a generic 'moat' and is easily replicable.
- The startup has a 'Zero Signal' with no users, no waitlist, and no revenue.

Diligence Questions

- Can you provide a clear explanation of how your product differentiates itself from competitors?
- How do you plan to address the domain experience gap within the team?
- Can you provide a detailed breakdown of your revenue model and how you plan to achieve profitability?

Score Breakdown

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	0.0/5
VISION	2.0/5
OPERATIONS	1.0/5