

Sheet 1

RAI PLATFORM - FINANCIAL MODEL DASHBOARD							
Executive Summary Key Metrics & KPIs Year 1-3 Financial Overview							
KEY PERFORMANCE INDICATORS							
\$13.28M	500K	\$3.60M	\$1.97M				
Year 1 Gross Revenue	Year 1 MAU	Platform Revenue	Year 1 EBITDA				
\$1.40	12:1	68%	Q3 2025				
Blended CAC	LTV:CAC Ratio	Day-7 Retention	Break-Even Quarter				
3-YEAR FINANCIAL SUMMARY							
Metric	Year 1 (2025)	Year 2 (2026)	Year 3 (2027)				
MAU	500000	5000000	10000000				
Gross Revenue (\$M)	13.28	80	185				
Creator Payouts (\$M)	9.68	56	129.5				
Platform Revenue (\$M)	3.6	24	55.5				
EBITDA (\$M)	1.87	16.5	39.5				
EBITDA Margin (%)	14.1	20.6	21.4				
Blended CAC (\$)	1.4	0.9	0.7				
LTV:CAC Ratio	8.6	26.7	78.59999999999999				
REVENUE STREAM HIGHLIGHTS (Year 1)							
Stream	Revenue (\$)	% of Total	Growth Driver				
Virtual Gifts	10800000	81%	Primary				
Brand Partnerships	1175000	9%	High Growth				
Creator Subscriptions	605000	5%	Growing				
Ad Revenue	400000	3%	Launching Q3				
Affiliate Marketing	200000	2%	Launching Q3				
Live Commerce	100000	1%	Launching Q4				

Sheet 2

RAI PLATFORM - INPUT ASSUMPTIONS				
Blue cells = hardcoded inputs All quarterly projections driven from these assumptions				
USER GROWTH ASSUMPTIONS	Q1 2025	Q2 2025	Q3 2025	Q4 2025
MAU Target	50000	100000	250000	500000
DAU/MAU Ratio	0.3	0.35	0.4	0.45
Avg Session Time (min)	28	35	40	47
Day-7 Retention Rate	0.55	0.6	0.65	0.68
Monthly Churn Rate	0.05	0.04	0.03	0.02
Creator Monetization Rate	0.02	0.03	0.05	0.08
ACQUISITION ECONOMICS	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Blended CAC (\$)	2	1.6	1.3	1.2
LTV:CAC Ratio	7.2	9	11.1	12
Avg Gift Value (\$)	5	5.5	6	6.5
Gift Volume Growth (QoQ)	0	0.4	0.35	0.3
Brand Partner Growth (QoQ)	0	0.4	0.35	0.3
Subscription Adoption Rate	0.01	0.02	0.03	0.05
REVENUE SHARE ASSUMPTIONS	Creator Share	Platform Share	Notes	
Virtual Gifts	0.7	0.3	Core monetization	
Ad Revenue	0.75	0.25	Scales with audience	
Creator Subscriptions	0.8	0.2	Fan loyalty	
Brand Partnerships	1	0	Platform fee separate	
Affiliate Marketing	0.15	0.85	Commission-based	
Live Commerce	0.75	0.25	Transaction model	
PLATFORM PERFORMANCE TARGETS	RAI Target	Industry Avg	Advantage	
Video Start Time	<500ms	1.2s	58% faster	
Live Stream Latency	<1.5s	3-5s	70% faster	

Feed Load Time	<200ms	500ms	60% faster	
API Response (p99)	<100ms	250ms	60% faster	
App Crash Rate	<0.1%	0.5%	80% better	
Uptime SLA	99.99%	99.9%	10x reliability	

Sheet 3

RAI PLATFORM - USER GROWTH & ACQUISITION							
Quarterly user acquisition, DAU, CAC spend, and retention metrics							
Period	Beginning MAU	New Users	Churned Users	Ending MAU	DAU	CAC (\$)	Total CAC Spend (\$)
Q1 2025	50000	0	2500	50000	15000	2	0
Q2 2025	50000	54000	4000	100000	35000	1.6	86400
Q3 2025	100000	153000	3000	250000	100000	1.3	198900
Q4 2025	250000	255000	5000	500000	225000	1.2	306000
Year 1 Total	50000	462000	14500	500000	225000	1.4	591300
Year 2 Total	500000	4600000	100000	5000000	2500000	0.9	4140000
Year 3 Total	5000000	5200000	200000	10000000	5000000	0.7	3640000
RETENTION METRICS	Q1 2025	Q2 2025	Q3 2025	Q4 2025			
Day-1 Retention	0.72	0.75	0.78	0.8			
Day-7 Retention	0.55	0.6	0.65	0.68			
Day-30 Retention	0.35	0.4	0.45	0.5			
Monthly Churn Rate	0.05	0.04	0.03	0.02			
DAU/MAU Ratio	0.3	0.35	0.4	0.45			
Avg Session Time (min)	28	35	40	47			

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RAI PLATFORM - REVENUE STREAMS					
Detailed breakdown of all revenue streams by quarter					
Revenue Stream	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Year 1 Total
Virtual Gifts	150000	750000	2400000	7500000	10800000
Ad Revenue	0	0	100000	300000	400000
Creator Subscriptions	5000	50000	150000	400000	605000
Brand Partnerships	25000	100000	300000	750000	1175000
Affiliate Marketing	0	0	50000	150000	200000
Live Commerce	0	0	0	100000	100000
TOTAL GROSS REVENUE					
REVENUE MIX (%)	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Year 1
Virtual Gifts	0.833	0.833	0.8	0.8149999999999999	0.8120000000000001
Ad Revenue	0	0	0.033	0.033	0.03
Creator Subscriptions	0.028	0.056	0.05	0.043	0.046
Brand Partnerships	0.139	0.111	0.1	0.082	0.08799999999999999
Affiliate Marketing	0	0	0.017	0.016	0.015
Live Commerce	0	0	0	0.011	0.008
QoQ GROWTH RATE (%)					
Virtual Gifts	-	400%	220%	213%	
Brand Partnerships	-	300%	200%	150%	
Creator Subscriptions	-	900%	200%	167%	
Total Revenue	-	400%	233%	207%	

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RAI PLATFORM - CREATOR PAYOUTS					
Creator revenue share by stream and total payout rates					
Payout Stream	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Year 1 Total
Virtual Gifts (70% to Creator)	105000	525000	1680000	5250000	7560000
Ad Revenue (75% to Creator)	0	0	75000	225000	300000
Subscriptions (80% to Creator)	4000	40000	120000	320000	484000
Brand Partnerships (100%)	25000	100000	300000	750000	1175000
Affiliate (15% to Creator)	0	0	7500	22500	30000
Live Commerce (75% to Creator)	0	0	0	75000	75000
TOTAL CREATOR PAYOUTS					
PAYOUT ANALYSIS	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Year 1 Avg
Gross Revenue	180000	900000	3000000	9200000	13280000
Total Creator Payouts	134000	665000	2182500	6642500	9624000
Creator Payout Rate	0.744	0.739	0.728	0.722	0.725
Platform Retained	46000	235000	817500	2557500	3656000
Platform Margin	0.256	0.261	0.273	0.278	0.275

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RAI PLATFORM - QUARTERLY P&L					
Gross revenue, creator payouts, platform revenue, operating costs, and EBITDA					
Line Item	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Year 1 Total
Gross Revenue	180000	900000	3000000	9200000	13280000
(-) Creator Payouts	-134000	-665000	-2190000	-6695000	-9684000
Platform Revenue	46000	235000	810000	2505000	3596000
OPERATING EXPENSES					
Marketing & Acquisition	-200000	-200000	-225000	-250000	-875000
Infrastructure & Cloud	-50000	-75000	-150000	-250000	-525000
Operations & Support	-30000	-50000	-100000	-150000	-330000
Total Operating Expenses	-280000	-325000	-475000	-650000	-1730000
EBITDA	-234000	-90000	335000	1855000	1866000
EBITDA Margin (%)	-1.3	-0.1	0.112	0.202	0.141
UNIT ECONOMICS					
Revenue per MAU (\$)	3.6	9	12	18.4	26.56
Platform Rev per MAU (\$)	0.92	2.35	3.24	5.01	7.19
Cost per MAU (\$)	5.6	3.25	1.9	1.3	3.46
ARPDau (\$)	0.04	0.09	0.11	0.14	0.16

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RAI PLATFORM - 3-YEAR PROJECTIONS			
Annual financial summary for Years 1-3 with all key metrics			
Metric	Year 1 (2025)	Year 2 (2026)	Year 3 (2027)
GROWTH METRICS			
Monthly Active Users (MAU)	500000	5000000	10000000
Daily Active Users (DAU)	225000	2500000	5000000
DAU/MAU Ratio	0.45	0.5	0.5
Active Creators	20000	200000	1000000
Markets	5	12	20
FINANCIAL METRICS (\$M)			
Gross Revenue	13.28	80	185
Creator Payouts	9.68	56	129.5
Platform Revenue	3.6	24	55.5
Platform Margin	0.271	0.3	0.3
Marketing Spend	0.875	3.5	8
Infrastructure Costs	0.525	2.5	5
Operations & Support	0.33	1.5	3
Total Operating Costs	1.73	7.5	16
EBITDA	1.87	16.5	39.5
EBITDA Margin	0.141	0.206	0.214
UNIT ECONOMICS			
Blended CAC (\$)	1.4	0.9	0.7
LTV:CAC Ratio	8.6	26.7	78.59999999999999
Day-7 Retention	0.62	0.65	0.68
Monthly Churn	0.03	0.02	0.015
Revenue per MAU (\$)	26.56	16	18.5

YEAR-OVER-YEAR GROWTH			
MAU Growth	-	900%	100%
Revenue Growth	-	502%	131%
EBITDA Growth	-	782%	139%
Platform Revenue Growth	-	567%	131%

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RAI PLATFORM - CREATOR TIER SYSTEM						
Breakdown of creator tier system with revenue splits, earnings, and monetization rates						
Creator Tier	Target Count	Revenue Split (Creator/Platform)	Avg Monthly Earnings (\$)	Monthly Guarantee (\$)	Monetization Rate	Key Benefits
Founder Creator	500	90/10	500	500	1	Guaranteed income + priority features
Growth Creator	5000	85/15	1500	0	0.8	Enhanced analytics + brand access
Established	50000	80/20	5000	0	0.6	Full monetization suite
Rising Star	200000	70/30	2000	0	0.3	Basic monetization + growth tools
Top Creator	1000	90/10	15000	0	0.95	Premium support + custom deals
TOTAL CREATORS						
EARNINGS POTENTIAL BY TIER	Low (\$)	Avg (\$)	High (\$)	Top 1% (\$)	Platform Fee (\$)	
Founder Creator	500	500	2500	10000	56	
Growth Creator	200	1500	5000	25000	265	
Established	500	5000	15000	50000	1250	
Rising Star	50	2000	8000	30000	857	
Top Creator	5000	15000	50000	100000	1667	
REVENUE SPLIT BY STREAM	Virtual Gifts	Subscriptions	Ad Revenue	Brand Deals	Commerce	
Founder (90/10)	0.9	0.9	0.9	1	0.9	
Growth (85/15)	0.85	0.85	0.85	1	0.85	
Established (80/20)	0.8	0.8	0.8	1	0.8	
Rising Star (70/30)	0.7	0.7	0.7	1	0.7	
Top Creator (90/10)	0.9	0.9	0.9	1	0.9	

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RAI PLATFORM - MARKETING BUDGET						
Quarterly allocation across channels with percentages (\$875K Year 1 Budget)						
Channel	Q1 2025 (\$)	Q2 2025 (\$)	Q3 2025 (\$)	Q4 2025 (\$)	Year 1 Total (\$)	Allocation (%)
Social Media Advertising	90000	90000	105000	109000	394000	0.45
Influencer Partnerships	50000	50000	60000	59000	219000	0.25
Performance Marketing	40000	40000	45000	50000	175000	0.2
Experiential Events	20000	20000	15000	32000	87000	0.1
TOTAL MARKETING BUDGET						1
CAC ANALYSIS BY CHANNEL	Q1 2025	Q2 2025	Q3 2025	Q4 2025		
Social Media CAC	1.5	1.2	0.95	0.85		
Influencer CAC	2.5	2	1.6	1.3		
Performance Marketing CAC	3	2.5	2	1.8		
Events CAC (est.)	5	4	3	2.5		
Blended CAC	2	1.6	1.3	1.2		
MARKETING ROI METRICS	Q1 2025	Q2 2025	Q3 2025	Q4 2025		
New Users Acquired	0	54000	153000	255000		
Marketing Spend (\$)	200000	200000	225000	250000		
Revenue Generated (\$)	180000	900000	3000000	9200000		
Marketing ROI	0.9	4.5	13.33	36.8		
LTV:CAC	7.2	9	11.1	12		

Sheet 10

RAI PLATFORM - INFRASTRUCTURE COSTS				
3-year scaling costs by component				
Component	Year 1 (\$)	Year 2 (\$)	Year 3 (\$)	3-Year Total (\$)
Compute (AWS/GCP)	150000	600000	1500000	2250000
Storage (S3/GCS)	100000	400000	1000000	1500000
CDN & Bandwidth	75000	300000	750000	1125000
Database Services	50000	200000	500000	750000
Video Processing	100000	500000	1250000	1850000
AI/ML Pipeline	30000	150000	400000	580000
Security & Compliance	15000	75000	200000	290000
Monitoring & Logging	5000	25000	100000	130000
TOTAL INFRASTRUCTURE				
COST EFFICIENCY METRICS	Year 1	Year 2	Year 3	Trend
MAU at Year End	500000	5000000	10000000	Growing
Infra Cost per MAU (\$)	1.05	0.45	0.57	Improving
Infra as % of Revenue	0.04	0.031	0.027	Improving
Infra as % of Platform Rev	0.146	0.104	0.09	Improving
YoY Infra Growth	-	329%	153%	Decelerating
SCALING STRATEGY				
Year 1: Foundation build (500K MAU capacity)				
Year 2: Horizontal scaling (5M MAU capacity)				
Year 3: Multi-region deployment (10M MAU capacity)				
Key: Economies of scale reduce per-user cost over time				

Sheet 11

RAI PLATFORM - CASH FLOW STATEMENT					
Quarterly operating cash flow, capex, and free cash flow with cumulative					
Line Item	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Year 1 Total
OPERATING ACTIVITIES					
Platform Revenue	46000	235000	810000	2505000	3596000
(-) Marketing Spend	-200000	-200000	-225000	-250000	-875000
(-) Infrastructure	-50000	-75000	-150000	-250000	-525000
(-) Operations	-30000	-50000	-100000	-150000	-330000
Net Operating Cash Flow	-234000	-90000	335000	1855000	1866000
INVESTING ACTIVITIES					
(-) Product Development	-75000	-100000	-125000	-175000	-475000
(-) Equipment & Hardware	-25000	-50000	-75000	-125000	-275000
Total Capital Expenditure	-100000	-150000	-200000	-300000	-750000
FREE CASH FLOW					
Operating Cash Flow	-234000	-90000	335000	1855000	1866000
(-) Capital Expenditure	-100000	-150000	-200000	-300000	-750000
Free Cash Flow	-334000	-240000	135000	1555000	1116000
Cumulative FCF	-334000	-574000	-439000	1116000	1116000
CASH POSITION					
Beginning Cash	2000000	1666000	1426000	1561000	
(+/-) Free Cash Flow	-334000	-240000	135000	1555000	
Ending Cash	1666000	1426000	1561000	3116000	
Months of Runway	21.4	14.6	9.9	15.7	

Sheet 12

RAI PLATFORM - SENSITIVITY ANALYSIS						
Conservative/Base/Optimistic scenarios showing impact on revenue and EBITDA						
YEAR 1 SCENARIO ANALYSIS	MAU	Gross Revenue (\$M)	Platform Rev (\$M)	EBITDA (\$M)	EBITDA Margin	FCF (\$M)
Conservative (-20%)	400000	10.6	2.88	1.15	0.109	0.4
Base Case	500000	13.3	3.6	1.87	0.141	1.12
Optimistic (+20%)	600000	16	4.32	2.59	0.162	1.84
YEAR 3 SCENARIO ANALYSIS	MAU	Gross Revenue (\$M)	Platform Rev (\$M)	EBITDA (\$M)	EBITDA Margin	FCF (\$M)
Conservative (-20%)	8000000	148	44.4	28.4	0.192	22
Base Case	10000000	185	55.5	39.5	0.214	32
Optimistic (+20%)	12000000	222	66.59999999999999	50.6	0.228	42
KEY SENSITIVITY DRIVERS	Base Value	-20% Impact	+20% Impact	Revenue Sensitivity		
MAU Growth Rate	900% YoY	-\$2.7M Revenue	+\$2.7M Revenue	High		
Avg Gift Value	\$5.75	-\$2.2M Revenue	+\$2.2M Revenue	High		
Creator Payout Rate	72.5%	+\$1.9M Platform Rev	-\$1.9M Platform Rev	Medium		
Monthly Churn	3.0%	+\$0.5M Revenue	-\$0.3M Revenue	Medium		
CAC	\$1.40	-\$0.1M Profit	+\$0.1M Profit	Low		
Ad Revenue Launch	Q3 2025	-\$0.4M Revenue	+\$0.4M Revenue	Medium		
RISK SCENARIOS	Probability	Revenue Impact	Mitigation			
Slow user adoption	Medium	-30% revenue	Increased marketing + referral incentives			
Higher churn than expected	Low	-15% revenue	Improved retention features + CulturalIQ			
Creator monetization below target	Medium	-20% revenue	Enhanced gift features + brand pipeline			
Infrastructure cost overrun	Low	-5% EBITDA	Auto-scaling + cost optimization			

Regulatory challenges	Low	-10% revenue	Compliance team + local partnerships			
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Sheet 13

RAI PLATFORM - BREAK-EVEN ANALYSIS				
Fixed costs, variable costs, contribution margin, and break-even point				
COST STRUCTURE	Monthly (\$)	Notes		
Fixed Costs				
Team Salaries & Benefits	80000	Engineering, product, ops		
Office & Admin	15000	Remote-first model		
Software Licenses	10000	SaaS tools		
Base Infrastructure	25000	Minimum cloud commitment		
Legal & Compliance	10000	Regulatory requirements		
Insurance & Other	10000	Business insurance		
Total Fixed Costs	150000			
Variable Costs (per user)				
CDN & Bandwidth	0.15	Per MAU per month		
Video Processing	0.12	Per MAU per month		
Payment Processing	0.1	Per transaction		
Support Cost	0.08	Per MAU per month		
AI/ML Processing	0.05	Per MAU per month		
Total Variable Cost/User	0.5	Per MAU per month		
BREAK-EVEN CALCULATION	Value	Formula		
Revenue per MAU (Monthly)	26.56	Gross Rev / MAU		
Variable Cost per MAU	0.5	Sum of var costs		
Contribution Margin per MAU	26.06	Revenue - Variable Cost		
Contribution Margin %	0.981	CM / Revenue		
Monthly Fixed Costs	150000	Total fixed costs		
Break-Even MAU	5755	Fixed / CM per user		
Break-Even Revenue (Monthly)	152848	BE MAU x Rev/MAU		

Projected Break-Even Quarter	Q3 2025	At ~250K MAU		
Projected Break-Even Month	Month 7	July 2025		
Margin of Safety at Year End	0.989	(500K-5.8K)/500K		
PATH TO BREAK-EVEN	Q1 2025	Q2 2025	Q3 2025	Q4 2025
MAU	50000	100000	250000	500000
Monthly Revenue (\$)	60000	300000	1000000	3067000
Fixed Costs (\$)	150000	150000	150000	150000
Variable Costs (\$)	25000	50000	125000	250000
Total Costs (\$)	175000	200000	275000	400000
Net Profit/Loss (\$)	-115000	100000	725000	2667000
Break-Even Achieved?	No	Yes	Yes	Yes

Sheet 14

Quarter	Virtual Gifts	Brand Partnerships	Subscriptions	Quarter	Total Revenue
Q1 2025	150000	25000	5000	Q1 2025	180000
Q2 2025	750000	100000	50000	Q2 2025	900000
Q3 2025	2400000	300000	150000	Q3 2025	3000000
Q4 2025	7500000	750000	400000	Q4 2025	9200000
Year	Gross Revenue	Platform Revenue	EBITDA		
2025	13280000	3596000	1866000		
2026	80000000	24000000	16500000		
2027	185000000	55500000	39500000		
Quarter	Operating CF	Free Cash Flow	Cumulative FCF		
Q1 2025	-234000	-334000	-334000		
Q2 2025	-90000	-240000	-574000		
Q3 2025	335000	135000	-439000		
Q4 2025	1855000	1555000	1116000		
Component	Cost				
Compute	150000				
Storage	100000				
CDN	75000				
Database	50000				
Video Processing	100000				
AI/ML	30000				
Security	15000				
Monitoring	5000				
Channel	Allocation				
Social Media	394000				
Influencer	219000				

Performance	175000				
Events	87000				
Scenario	Year 1 Revenue	Year 3 Revenue			
Conservative	10600000	148000000			
Base Case	13300000	185000000			
Optimistic	16000000	222000000			
Quarter	Revenue	Total Costs			
Q1 2025	60000	175000			
Q2 2025	300000	200000			
Q3 2025	1000000	275000			
Q4 2025	3067000	400000			