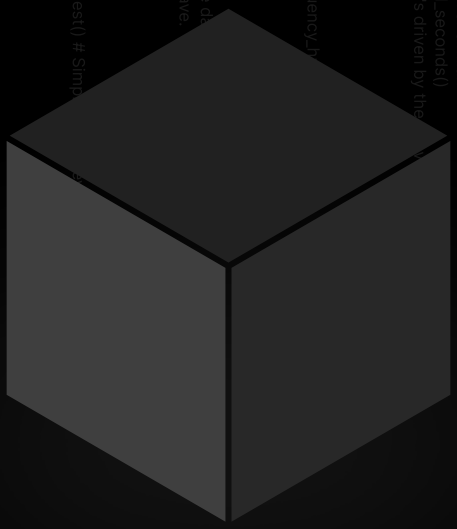

AIOS

INVESTMENT

PITCH DECK

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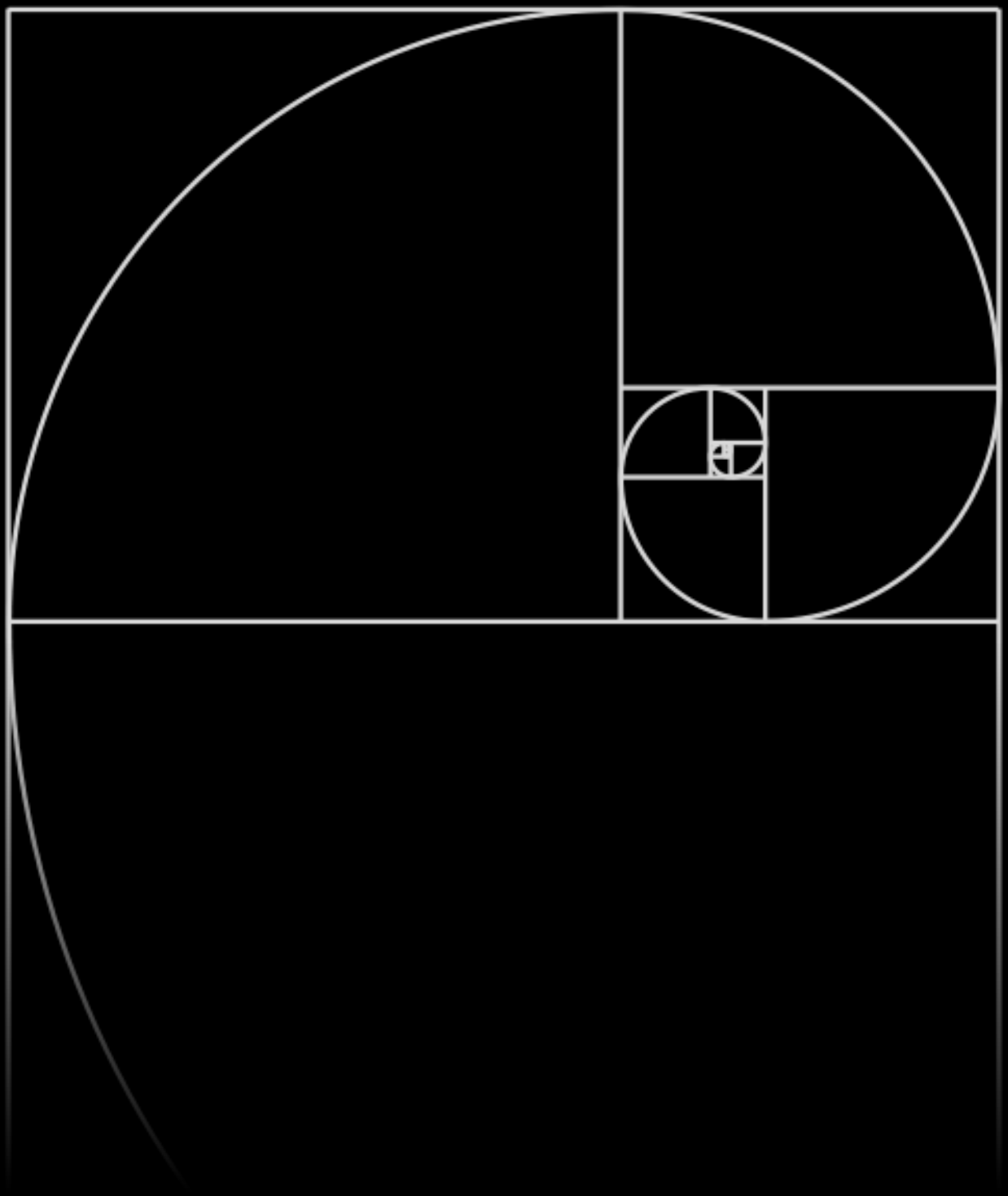
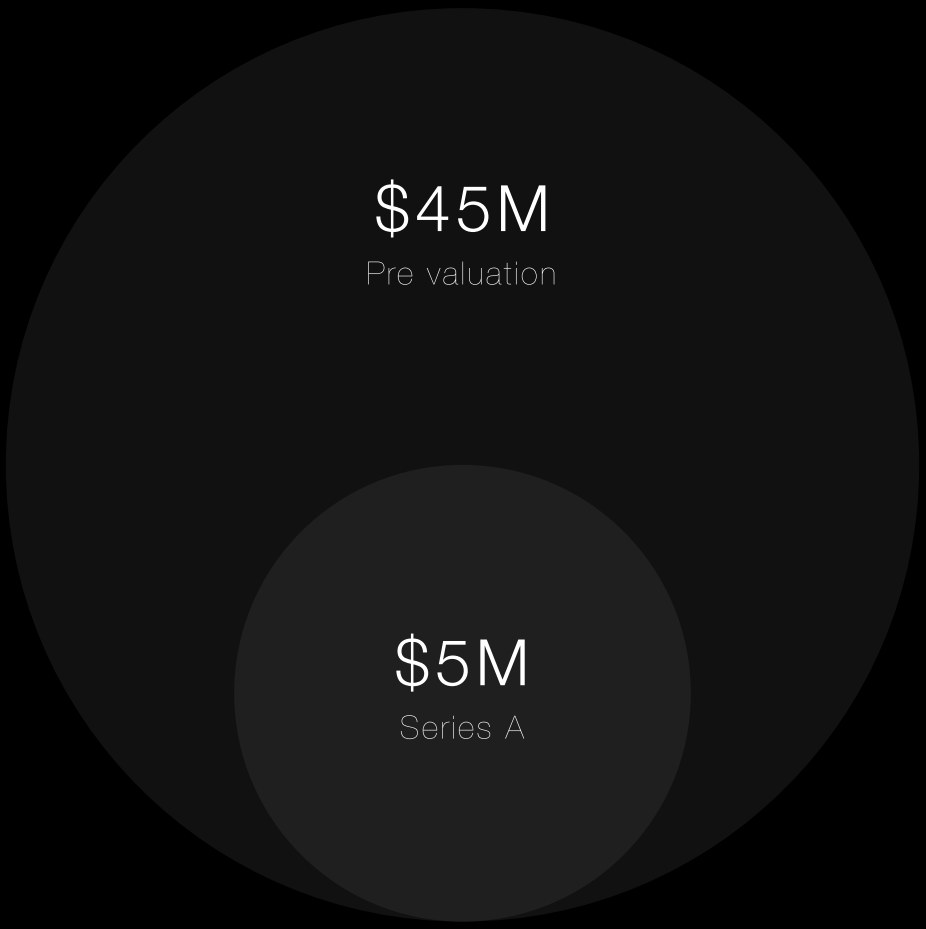


EXECUTIVE SUMMARY

AIOS is building the definitive OS-native agentic AI platform, enabling direct computer control through a model-agnostic architecture. Unlike cloud-based competitors, we're delivering native Windows/Mac integration with MCP (Model Context Protocol) standardization, positioning us to capture significant share of the $22B AI automation market by 2027.

INVESTMENT HIGHLIGHTS



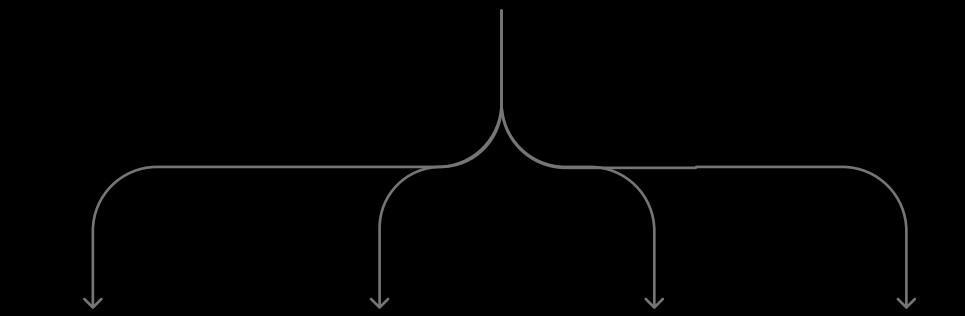
AIOS seeks $5M Series A funding at a $45M pre-money valuation. This investment will fuel our OS-native agentic AI platform.

INVESTMENT HIGHLIGHTS

NATIVE OS

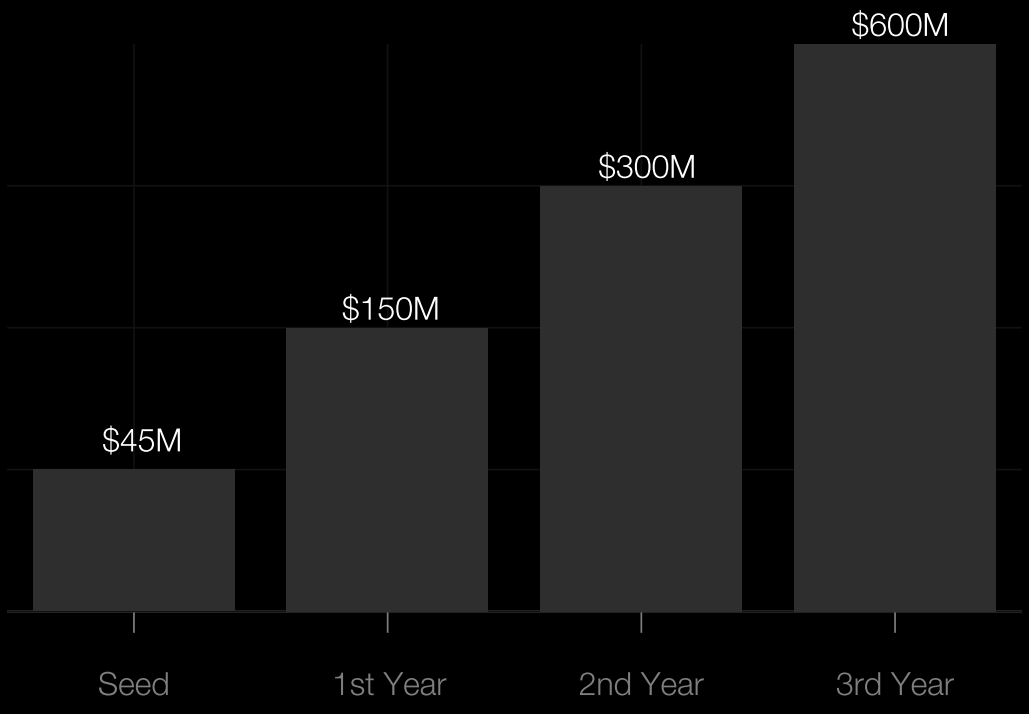
AIOS offers native OS integration for its agentic AI, meaning it runs directly on the system, not in a VM or the cloud. This provides deeper control and efficiency.

AIOS



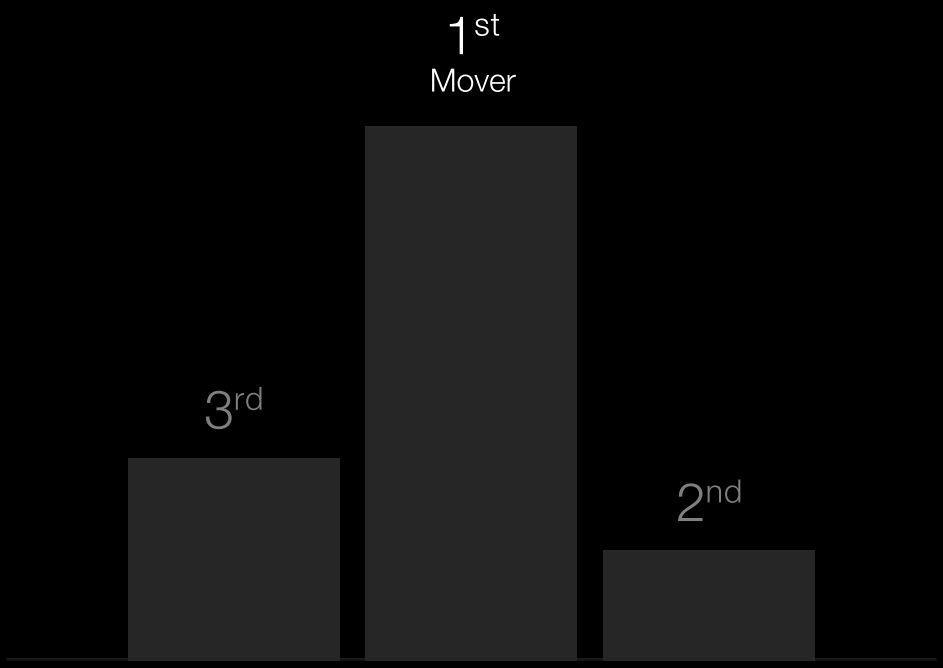
AIOS employs a *model-agnostic* architecture with MCP standardization. This allows flexibility and broad compatibility.

INVESTMENT HIGHLIGHTS



AIOS projects a path to a $600M valuation by Year 3, based on achieving $40M in EBITDA and a 15x multiple.

INVESTMENT HIGHLIGHTS



AIOS targets first-mover advantage in native desktop automation via OS-integrated, model-agnostic AI. This unique approach aims to capture the desktop power user and SMB markets early.

The Agentic AI Inflection Point

The market is transitioning from conversational to agentic AI. While multiple players are entering this space, critical differentiation exists

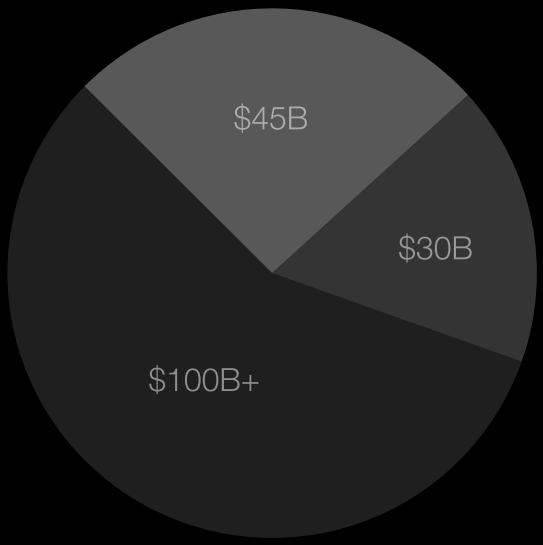
CATEGORY	LIMITATION	AIOS ADVANTAGE
Cloud-Based Agents ADEPT Induced	Latency privacy concerns limited OS access	Native execution local compute full system access
Single-Model Solutions OpenAI Agents SIMULAR	Vendor lock-in limited extensibility	Model-agnostic MCP-enabled
Browser-Only Browserbase Playwright	No desktop - application control	Full OS integration
Enterprise-Only UI PATH AI	Complex deployment high cost	Consumer-friendly immediate deployment

MARKET DYNAMICS & OPPORTUNITY

TAM ANALYSIS

PRIMARY

250M DESKTOP POWER
USERS × $180 ARPU



SECONDARY

50M SMBS SEEKING
AUTOMATION × $600 ARPU

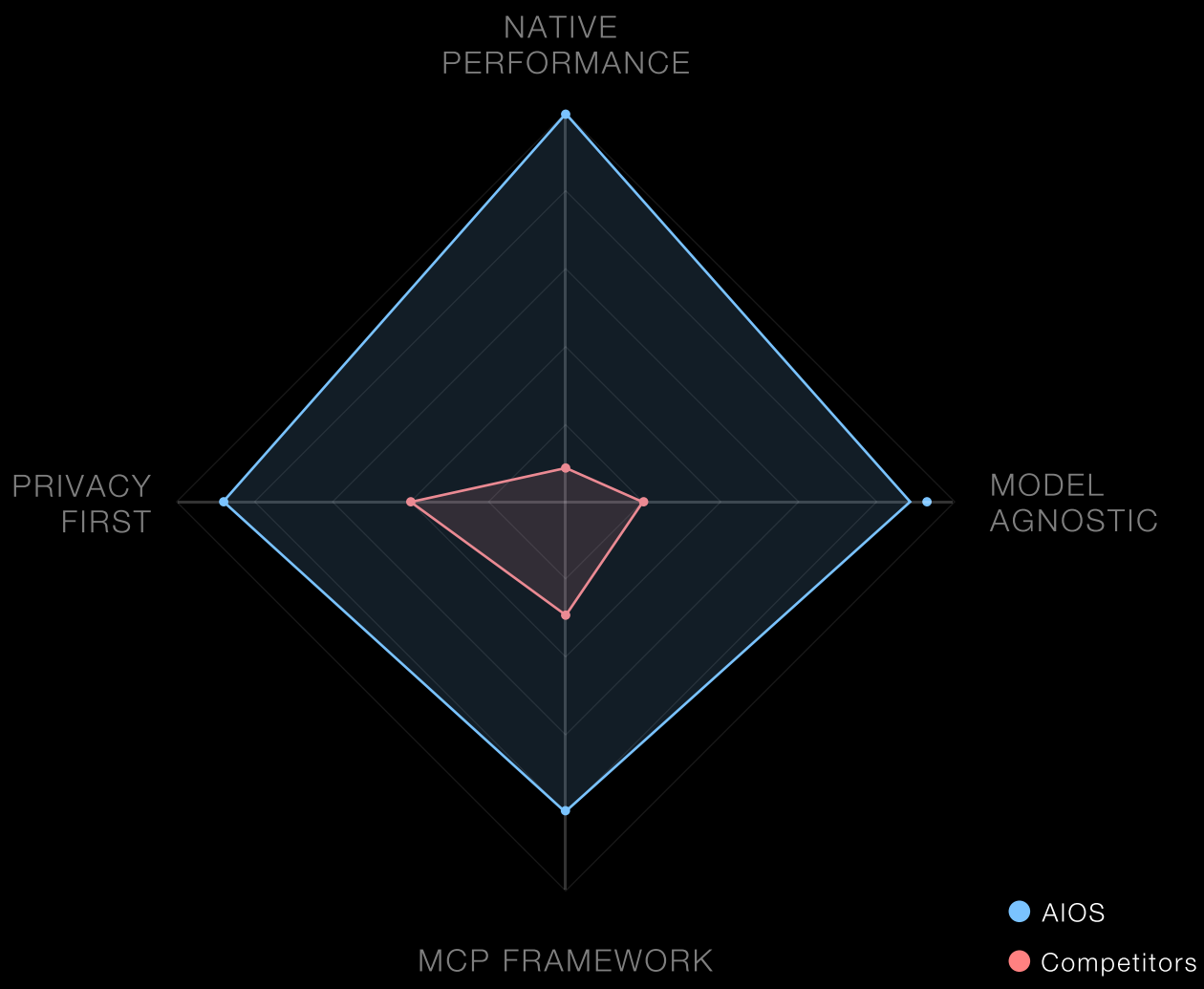
TERTIARY

MOBILE EXPANSION (2B USERS)
= $100B+ OPPORTUNITY

AIOS targets a large and growing TAM, starting with desktop power users ($45B) and SMB automation ($30B). The future mobile market offers a $100B+ expansion opportunity, showcasing significant growth potential.

MOAT

DEFENSIBLE ADVANTAGES



1. **Native Performance:** 10x more powerful than cloud-based solutions
2. **Model Agnostic:** Hours to integrate new models vs. months for competitors
3. **MCP Framework:** Industry-standard protocol for tool integration
4. **Privacy-First:** Local execution addressing enterprise security concerns

BUSINESS MODEL & UNIT ECONOMICS

REVENUE MODEL

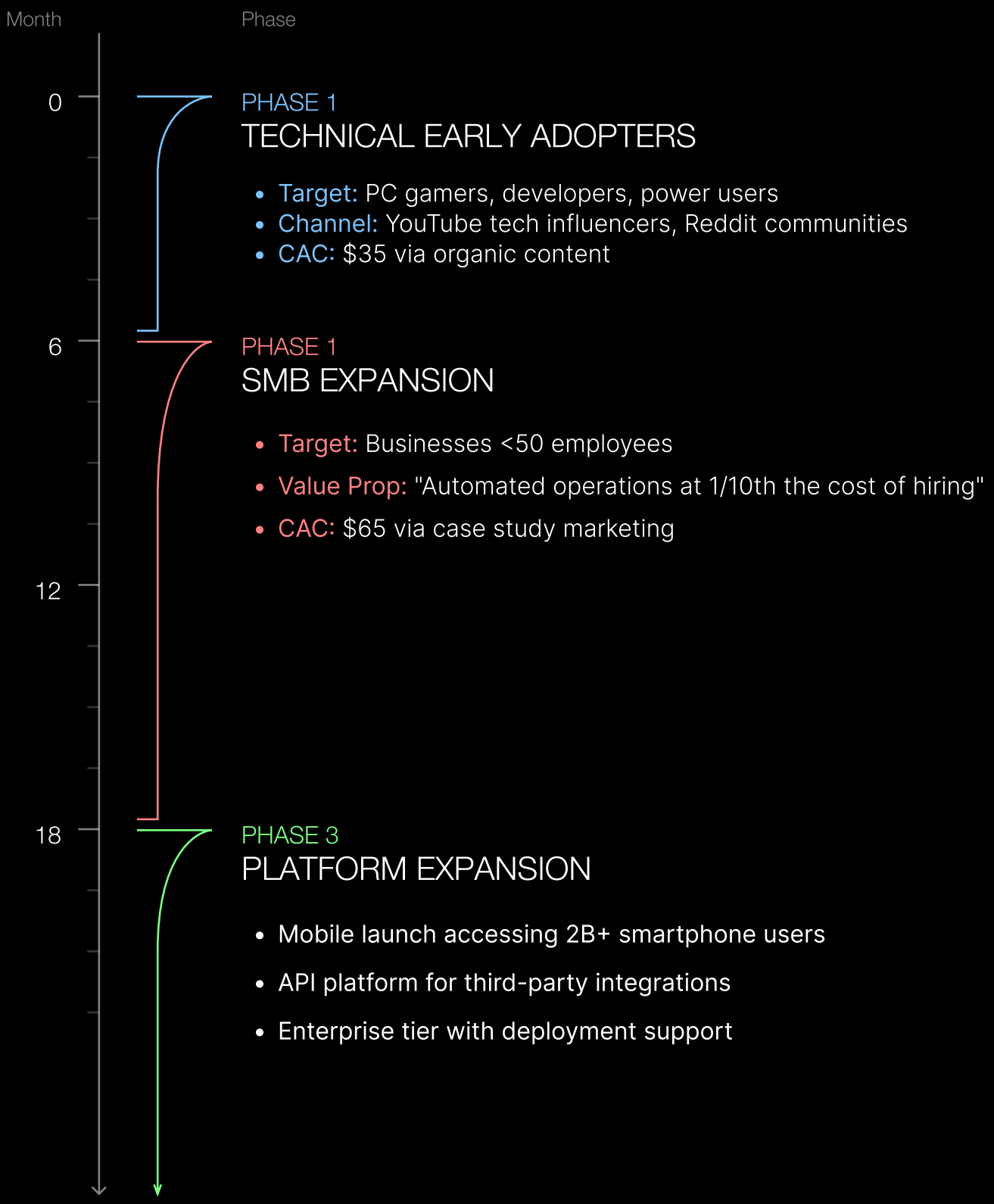
CATEGORY	DETAILS
B2C SaaS	$9.99 - $49.99/month tiers
AI Compute Credits	3% - 33% margin on usage
Future	Enterprise licenses & API access

COHORT ECONOMICS

CATEGORY	DETAILS
CAC (Customer Acquisition Cost)	$35 - $65 (blended)
Month 1 Retention	85%
Month 12 Retention	75%
LTV/CAC Ratio	5.4x - 18.5x
Payback Period	3 - 4 months

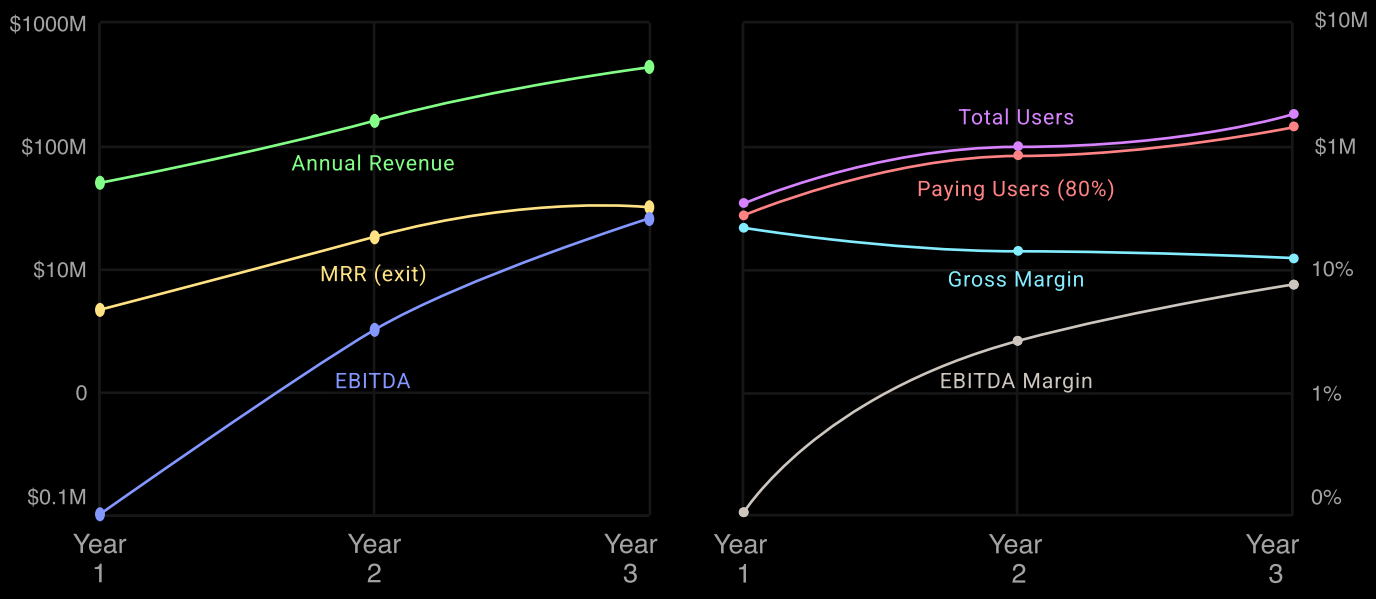
STRATEGY

GO-TO-MARKET STRATEGY



STRATEGY

FINANCIAL PROJECTIONS



METRIC	YEAR 1	YEAR 2	YEAR 3
Total Users	400K	1M	2.5M
Paying Users (80%)	320K	800K	2M
MRR (exit)	$4.8M	$14.4M	$44M
Annual Revenue	$57.6M	$172.8M	$528M
Gross Margin	0.25	0.18	0.12
EBITDA	-$3M	$5M	$40M
EBITDA Margin	-0.052	0.029	0.076

STRATEGY

CURRENT VALUATION

$45M PRE-MONEY

- REPRESENTS 0.78X YEAR 1 PROJECTED REVENUE
- SIGNIFICANTLY BELOW 2-5X SAAS INDUSTRY STANDARD
- CONSERVATIVE VALUATION PROVIDES IMMEDIATE UPSIDE FOR INVESTORS

VALUATION TRAJECTORY

Comparable Exits

UiPath ($35B)
Automation Anywhere ($6.8B)

AIOS projects significant valuation growth, reaching $600M by Year 3 with a 15x EBITDA multiple.

LEADERSHIP TEAM

EXECUTIVE TEAM

Chairman & Investor

Francis Edelman

- A seasoned serial entrepreneur with a track record of building successful ventures.
- Possesses deep AI market insights, understanding key trends and opportunities in artificial intelligence.
- An active investor who brings strategic guidance and industry connections.

CEO

Andrea Edelman

- Over 15 years leading Blackcode SA, demonstrating long-term leadership and stability.
- Focuses on achieving strong operational efficiency and optimized processes.
- Known for proven strategic leadership and the ability to execute organizational goals.

LEADERSHIP TEAM

EXECUTIVE TEAM

CTO

Bojan Andrejek

- Specialist in AI systems, app ecosystems, and enterprise software solutions
- Expert in AI/ML integration, cloud infrastructure, and technical team leadership
- Successfully delivered projects for prestigious clients including Audemars Piguet

Engineering Lead

Ibrahim Muhammad

- Expertise in core platform development, ensuring a robust and scalable AIOS foundation.
- Specializes in MCP implementation, bringing focused knowledge of this specific platform.
- Offers 10+ years of experience in cross-platform development, enhancing the platform's versatility.

PROCEEDS

USE OF PROCEEDS

Allocation	Amount	Deliverable
Engineering & computing & team (70%)	$3.5M	Mac release, Windows version enhancement, new features, continuous improvement, recruitment, servers & infrastructure
Growth & advertising* (20%)	$1M	Content partnerships, SMB outreach
Operations (10%)	$0.5M	Various

*ASSUMES STRONG WORD OF MOUTH AND 0 COST USER ACQUISITION AT A RATE OF 95%+ COMPARABLE TO OTHER SUCCESSFUL AI COMPANIES.

RISK FACTORS & MITIGATION

Risk	Mitigation Strategy
Platform dependency	Native integration reduces API risk
Competition from incumbents	Speed to market, model-agnostic approach
User acquisition costs	Organic growth through creator economy
Technical complexity	Proven POC, experienced team

INVESTMENT TERMS

$45M
PRE-MONEY VALUATION

$5M
AMOUNT

10%
POST-MONEY OWNERSHIP

Structure
Series A Preferred Stock

1X
LIQUIDATION PREFERENCE

5 SEATS
BOARD COMPOSITION
2 FOUNDERS, 1 INVESTOR, 2 INDEPENDENT

ANTI-DILUTION
WEIGHTED-AVERAGE BROAD-BASED

?

WHY NOW

1. MCP Standardization: Industry coalescing around open protocol
2. Model Maturity: Models finally capable of reliable agency
3. Market Education: Users understand AI, ready for next evolution
4. Competition Fragmented: Window to establish category leadership

EXIT STRATEGY

STRATEGIC ACQUIRERS

- Microsoft (extend Windows AI capabilities)
- Apple (AI integration for Mac ecosystem)
- Salesforce/ServiceNow (automation expansion)

STRATEGIC ACQUIRERS

- Comparable multiples: 10-30x revenue for AI automation
- Timeline: 3-5 year horizon
- Minimum target: $1B+ valuation

EUROPEAN ADVANTAGE

STRATEGIC POSITION IN UNDERSERVED MARKET

Europe represents 25% of global enterprise software spending but hosts no major B2C software platforms. This creates unique opportunities:

MARKET DYNAMICS

- Significant government interest in developing local AI champions
- EU investing €20B in digital sovereignty initiatives
- Growing preference for privacy-compliant, locally-operated solutions
- Reduced competition from US/China players who prioritize home markets

REGULATORY ALIGNMENT

- GDPR-compliant by design through local compute architecture
- Swiss base provides neutrality for global expansion
- Positioned to benefit from EU Digital Markets Act provisions

SCALING BENEFITS

- Access to European talent without Silicon Valley cost inflation
- Eligibility for innovation grants and R&D tax incentives
- Potential sovereign fund investment as user base grows
- Strategic value to acquirers seeking established European presence

HISTORICAL CONTEXT

European governments have shown strong support for breakout tech companies (Spotify, BioNTech, Mistral AI). As AIOS scales, we're positioned to become a strategic asset in Europe's push for technological sovereignty.

CONTACT

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AIOS

www.getaios.com

We are not an AI company - we are a prompt engineering company. We don't build models, we orchestrate them to make AI actually useful. As models get better, AIOS gets better.