Holding financial model and round

Menteia — An applied artificial intelligence product studio for industries in Mexico and LatAm.

Offer

Item	Value
Amount to raise	US$4,800,000
Equity offered	31.3%
Pre-money valuation	US$10,550,000
Post-money valuation	US$15,350,000
Gross 24-month spend (with synergies)	US$4,359,480
10% contingency	US$435,948
Projected 24-month revenue	US$2,580,949
Sum of standalone rounds (reference)	US$5,650,000

Valuation

- Sum of the standalone pre-money valuations: US$16,200,000.
- Holding discount of 35% for diversification and early stage: proposed pre-money US$10,550,000.
- In exchange, the investor gets exposure to all 11 products and the shared platform, with pro-rata rights in the rounds of each spun-out product.

In tranches (alternative)

- Tranche 1: US$2,250,000 at closing (12 months of operation).
- Tranche 2: US$2,550,000 upon hitting month-12 milestones (consolidated MRR, new customers, Doble D regulatory status).
- Same valuation for both tranches.

Use of funds by product

Product	24-month spend	% of total
Doble D	US$589,059	13.5%
SAVANT AI	US$626,519	14.4%
Menteia KYC	US$543,186	12.5%
Vamo	US$464,514	10.7%
Menteia Hedge	US$340,302	7.8%
Seguro Sin Vueltas	US$385,365	8.8%
Sommelier IA	US$207,167	4.8%
Copiloto Aero	US$444,178	10.2%
PlaneTech Air Express	US$363,874	8.3%
RosettaDMS	US$323,315	7.4%
Holding G&A	US$72,000	1.7%

Leadership team

Mexican startup market salaries (gross per month, in USD at 18.5 MXN/USD): CEO/CFO US$5,135; CTO US$5,135; Legal Director US$3,784. The partners' time is split across products according to their stage (see each product's model).

Suggested terms (non-binding)

- Seed Series preferred shares of Menteia (conversion into an S.A.P.I. before closing).
- 1x non-participating liquidation preference; 10% post-round option pool.
- One board seat for the lead investor; quarterly reporting per product.
- Pro-rata rights in the rounds of spun-out products.
- Founder vesting over 4 years with a 1-year cliff, crediting time served.