Financial model and round

SAVANT AI — AI contact center on voice, WhatsApp and email that resolves (not just answers) mobile carriers' customer requests.

The offer

Item	Value
Amount to raise	US$825,000
Equity offered	24.8%
Pre-money valuation	US$2,500,000
Post-money valuation	US$3,325,000
Gross 24-month spend	US$737,081
10% contingency	US$73,708
Projected 24-month revenue	US$258,165
Peak cash need (net of revenue)	US$478,916
Cushion if revenue targets are met	US$346,084

The amount covers **24 months of gross spend excluding revenue** plus a 10% contingency. If revenue targets are met, the cushion extends the runway or funds additional growth without another round.

How we arrived at the valuation

Slightly above the LatAm pre-seed average (US$2.1–2.2 M) because there is a paying customer and public metrics (63% containment, 430 calls in 30 days). Sierra and Decagon are US outliers and are not useful as anchors.

Comparable	Actual data	Source
Treble.ai (Colombia)	US$15 M Series A in 2022 (Tiger Global), no public valuation	latamlist.com
Yalo (Mexico)	US$50 M Series C in 2021; US$20 M extension in 2023	yourstory.com; cbinsights.com
Decagon (US)	US$4.5 B in Jan-2026 (outlier)	bloomberg.com
Sierra (US)	US$15.8 B post in May-2026, >US$150 M ARR (outlier) [verify]	secondary press

Market references

Reference	Data	Source
Y Combinator standard deal	US$125k for 7% on a post-money SAFE (≈ US$1.79 M post) + US$375k on an uncapped SAFE with MFN	ycombinator.com/deal; ycinsight.com/yc-deal
YC Winter 2027 deadline	2-Nov-2026, 8 pm Pacific time; batch Jan–Mar 2027 [verify at ycombinator.com/apply]	buildmvpfast.com; blog.mean.ceo
Pre-seed in LatAm	Average valuation US$2.1–2.2 M (1H-2025); no verifiable public median exists for Mexico	equidam.com/startup-valuation-delta-h1-2025
Pre-seed SAFE caps in the US	Median ~US$10 M post for US$250k–1M rounds (2025); 93% of pre-seed rounds are SAFEs	carta.com/data/state-of-pre-seed-2025-full-report; carta.com (
Growth YC considers good	5–7% per week in the main metric (revenue or active users)	paulgraham.com/growth.html
Default alive	At current growth and spending, does it reach profitability before the money runs out?	paulgraham.com/aord.html

Default alive?

Not yet. Current revenue is ~US$3.2k/month shared with KYC; the funded plan reaches ~US$23k MRR in 24 months, still below its cost. Revenue figures in this model are projections, not data; the only actual revenue is shown in *04_Traccion* (traction).

Dilution if raised in tranches

- Full round (24 months): US$825,000 for 24.8%.
- First tranche only (12 months, US$400,000): 13.8% at the same valuation.
- Reference: YC gives US$125k for 7% plus US$375k on an uncapped SAFE.

Use of funds

Category	Amount	% of total
Product and engineering team	US$345,892	42.7%
Sales, marketing and customer success	US$190,703	23.5%
Founders (time dedicated to the project)	US$91,070	11.2%
Infrastructure and AI compute	US$71,016	8.8%
Legal, compliance and tools	US$38,400	4.7%
Contingency (10%)	US$73,708	9.1%

Funded team

Gross monthly market salaries for startups in Mexico, shown in USD at an assumed exchange rate of 18.5 MXN/USD. Employer cost = salary × 1.35 (social security, housing fund, payroll tax and benefits).

Role	Salary USD/month	FTE	Start	Cost USD/month
Senior full-stack engineer	US$4,054	1	month 1	US$5,473
AI / ML engineer	US$4,595	1	month 1	US$6,203
Customer success / implementation	US$1,892	1	month 1	US$2,554
B2B account executive	US$2,162	1	month 3	US$2,919
Full-stack developer	US$2,703	1	month 7	US$3,649
Support / operations	US$1,351	1	month 9	US$1,824

Founders: 20% of the three partners' time allocated to this project. Reference salaries: CEO/CFO US$5,135, CTO US$5,135, Legal US$3,784 per month.

Operating expenses (USD/month, month 1)

Item	USD/month
Infrastructure (servers, database, telephony)	US$1,200
AI compute (LLM, voice, OCR)	US$1,000
SaaS tools	US$400
Legal, accounting and compliance	US$700
Other (office, travel, insurance)	US$500
Infrastructure and AI grow 3% per month with volume.	

Quarterly projection

Quarter	Revenue	Expenses	Net cash flow	Cumulative cash used
Q1	US$7,290	US$73,090	US$-65,800	US$65,800
Q2	US$10,440	US$79,522	US$-69,082	US$134,882
Q3	US$17,325	US$92,886	US$-75,561	US$210,443
Q4	US$24,345	US$97,129	US$-72,784	US$283,226
Q5	US$33,795	US$97,723	US$-63,928	US$347,154
Q6	US$43,110	US$98,317	US$-55,207	US$402,361
Q7	US$55,125	US$98,911	US$-43,786	US$446,146
Q8	US$66,735	US$99,505	US$-32,770	US$478,916

Revenue assumptions:

- Current revenue attributed to SAVANT: ~US$2,160/month (assumption: 2/3 of revenue shared with KYC) with 3 brands.
- One new brand or carrier every 2 months starting month 5: 13 brands by month 24.
- Average revenue per brand grows from US$720 to US$1,800/month through volume and additional channels.
- Telephony and AI costs grow 3% monthly with volume.

Month-by-month detail in *modelo_24_meses.csv*.

Suggested terms (non-binding)

- Instrument: Seed Series preferred shares issued by a Mexican S.A.P.I. (or a SAFE with a valuation cap equal to the post-money and a 20% discount).
- 1x non-participating liquidation preference.
- Employee option pool: 10% post-round, to be created before closing.
- Quarterly information rights (financial statements, roadmap KPIs) and a board observer seat for the lead investor.
- Pro-rata rights in the next round; standard tag-along and drag-along.
- Founder vesting: 4 years with a 1-year cliff, crediting time served since the project began.
- Structure: spin the project out of Menteia into its own S.A.P.I. (Menteia and the founding partners as shareholders, with a shared technology license) or invest directly in Menteia (see the holding folder).