



INVESTOR RELATIONS · PRO-FORMA MODEL

The 5-year financial model

A capital-light clearing business: revenue scales with cleared volume, not headcount.

Toggle the scenario; every figure is driven by /data/financials/model.json (a non-dev can edit it).

Bear

Base

Bull

Export model (CSV)

Revenue 2030

\$27M

EBITDA 2030

\$5.0M

GMV 2030

\$1.15B

Break-even

Year 4

Revenue

Base — as modeled



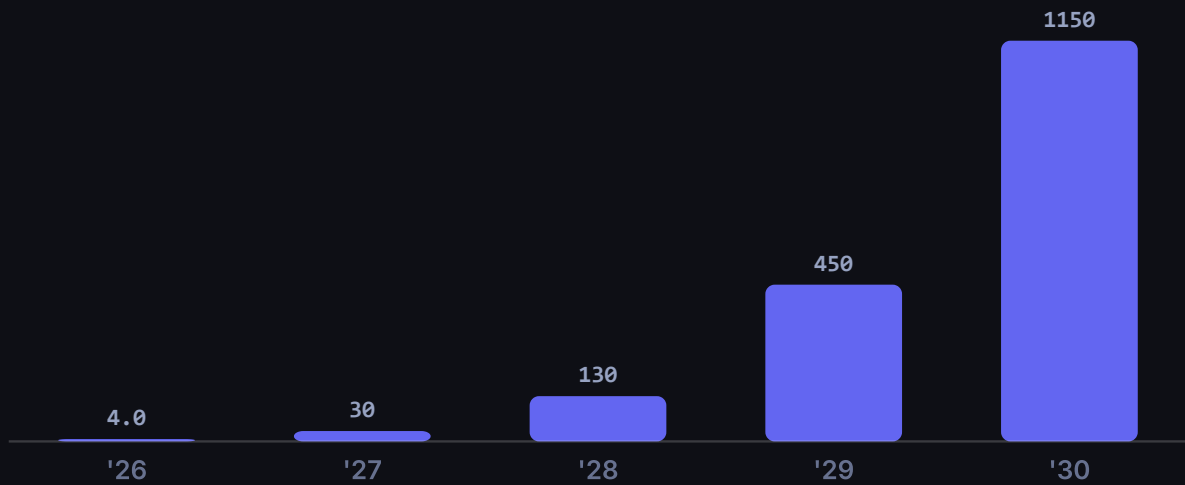
EBITDA

Break-even in Year 4 (base); operating leverage of a clearing business.



Cleared volume (GMV)

The north-star metric — every revenue line is a take-rate on this.



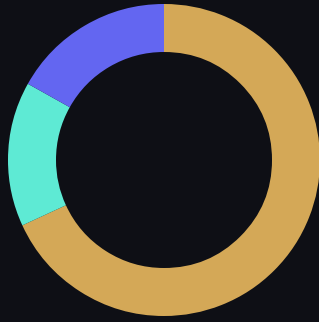
Cap table

Pre-seed stage.

⌘k

I am a

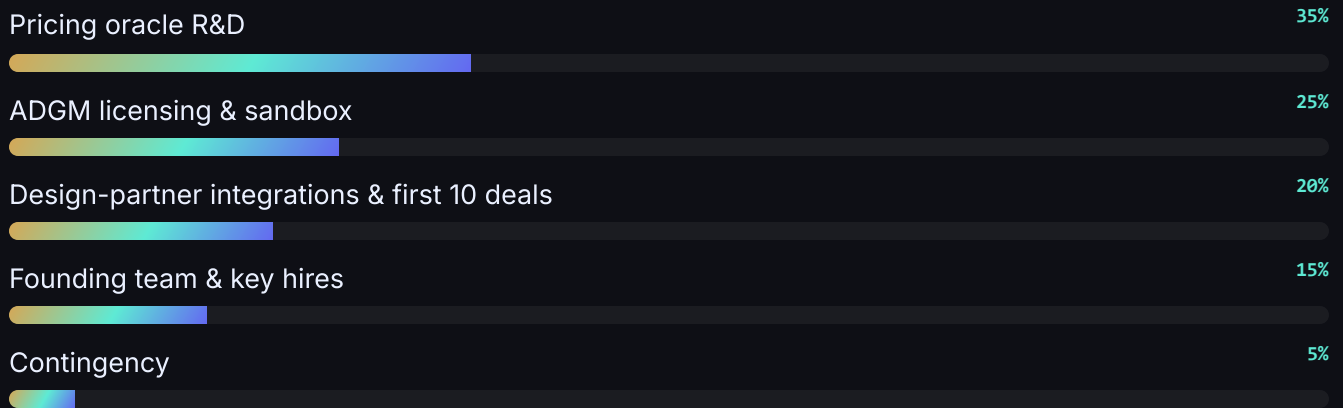
Apply as a startup →



- Founders — 68%
- ESOP pool — 15%
- Pre-seed investors — 17%

Use of funds — \$3M pre-seed

ADGM Sandbox stage.



Base-case P&L

USD millions. Revenue = sum of the four lines.

USD MILLIONS	2026	2027	2028	2029	2030
Clearing fee (1.5%)	0.1	0.5	1.9	6.8	17
Oracle data	0.1	0.2	0.7	1.8	3.8
Origination (0.5%)	0.0	0.1	0.7	2.3	5.8
Treasury float	0.0	0.0	0.0	0.1	0.2
Total revenue	0.1	0.8	3.3	11	27
Deals cleared	16	100	325	900	1920
EBITDA	-1.5	-2.3	-3.2	0.3	5.0

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Apply as a startup →

Illustrative; assumptions: 1.5% clearing take-rate, 0.5% origination, 3.0% treasury float, ~85% gross margin, \$250k avg deal. Not investment advice.

Funding plan

Pre-seed (ADGM Sandbox)

\$3M

Seed

\$15M

Series A (post-license)

\$60M

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