



OBIS Executive Financial Overview – 2027

Institutional Financial Perspective on
Platform Value, Capital Formation and Strategic Growth

Executive Positioning

Following its 2026 institutional entry into the international community, OBIS enters the 2027 investment cycle as an integrated early-stage innovation company with a flagship respiratory program, a 72-product biotechnology architecture across six generations, a structured capital plan and additional long-horizon platform optionality.

2027 INVESTMENT PROPOSITION

OBIS enters the 2027 investment cycle with a defined seed objective of US\$1.2M, a staged financing architecture, a flagship LPS™ commercial case, an SPI™ strategic market model, a current portfolio architecture of 72 proposed products across six generations through 2034, and a formula-driven Pre-Money Valuation of US\$5.448B. The series is designed for public investor review. Technical information remains protected.

The core investment logic

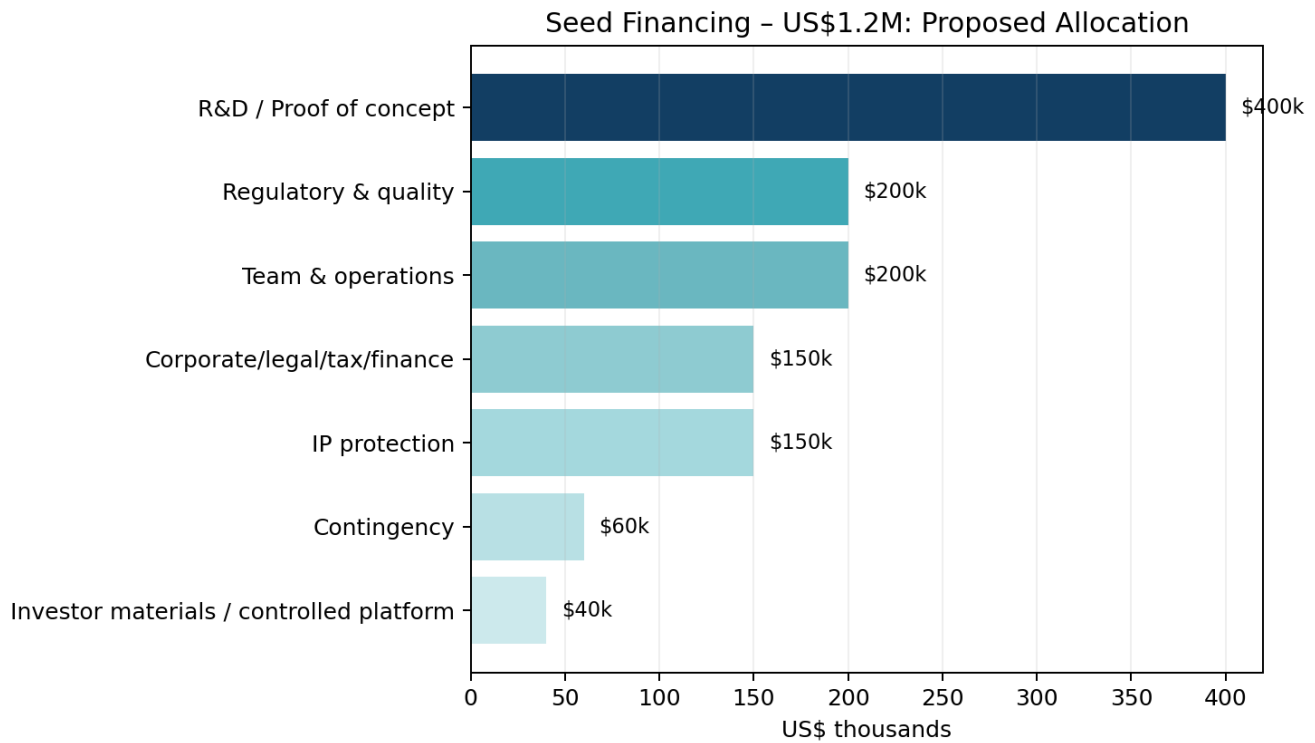
- **Flagship-to-platform architecture.** LPS™ provides a focused commercial and health-economic entry point; the wider portfolio broadens optionality beyond a single asset.
- **Capital linked to de-risking.** Seed capital is tied to proof-of-concept planning, IP protection, regulatory/quality preparation, corporate structure and operating capability.
- **Scenario discipline.** All investor-facing commercial, market and valuation scenarios in this series are framed from 2027 forward, with clearly stated assumptions and milestone dependencies.
- **Protected disclosure.** Investor materials describe scientific and commercial logic without disclosing enabling formulation details for LPS™ or SPI™.
- **Scalable collaboration.** Licensing, co-development, milestone financing, strategic investment and institutional partnerships remain potential routes to value creation.

US\$1.2M Seed financing objective Foundational de-risking and readiness	72 Proposed products Six generations · 2027–2034	US\$3.01B LPS™ gross revenue scenario 6% U.S. population scale scenario
US\$831M LPS™ modeled net scenario 6% U.S. population scale scenario	US\$22.89B SPI™ base cumulative revenue 2027–2034 model	US\$5.448B Current Pre-Money Formula-driven valuation standard

Source / methodology note: Figures in this edition are presented as 2027 forward-looking scenario models for investor analysis. They are not audited results, contracts or guaranteed forecasts.

Financial Architecture & Capital Strategy

A staged capital model separates foundational de-risking from later clinical, manufacturing and commercialization requirements.



Seed mandate

US\$1.2M SEED ROUND

The financing standard identifies the seed round as the capital required to advance corporate readiness, intellectual-property protection, proof-of-concept work, regulatory preparation and foundational operations. A later Series A mandate of US\$100M is treated as a separate financing stage for clinical development, CMC/GMP, infrastructure, scale-up and institutional expansion.

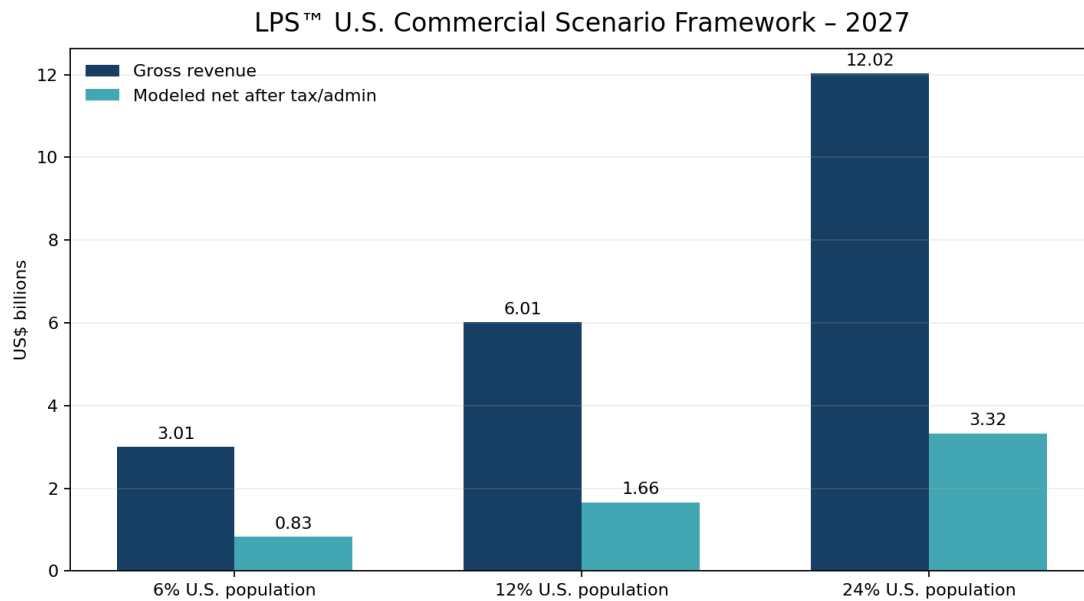
Allocation logic

- US\$400k – initial R&D and proof-of-concept work.
- US\$200k – regulatory and quality preparation; US\$200k – minimum team and operations.
- US\$150k – corporate/legal/tax/financial formalization; US\$150k – IP protection strategy.
- US\$60k – central contingency; US\$40k – investor materials and controlled information platform.

Source / methodology note: The seed allocation is presented as the 2027 financing structure and remains subject to updated quotations, scientific priorities and professional review.

LPS™ Commercial & Health-Economic Anchor

The flagship case is presented at a commercial and system-impact level only. No enabling formulation information is disclosed.



2027 COMMERCIAL SCALE SCENARIOS

The LPS™ U.S. commercial framework examines 6%, 12% and 24% penetration of the total U.S. population. At 6%, the scenario corresponds to approximately 20.04 million users, US\$3.006B gross revenue and approximately US\$831.2M modeled net after administrative cost and corporate tax. These are scale-sensitivity outputs under the 2027 model, not a one-year launch forecast, current revenue or guaranteed performance.

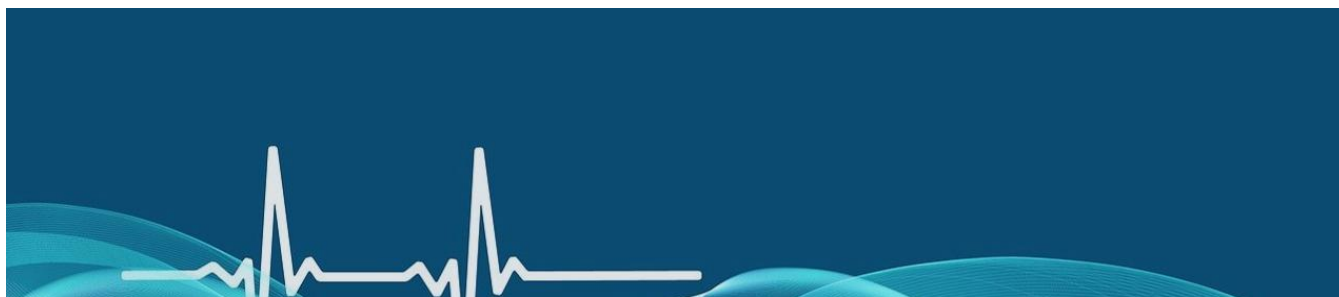
Health-economic thesis

- The 2027 LPS™ health-economic model evaluates potential U.S. system-level savings across asthma, COPD, cystic fibrosis, COVID/long COVID, influenza, respiratory infections and pneumonia.
- Under the current internal sensitivity framework, the aggregate modeled system-value opportunity is approximately US\$153.86B, subject to clinical validation, cost-input review and prevention of double counting.
- **The investor significance** is dual: potential enterprise revenue and potential system-level cost offsets if clinical effectiveness and real-world utilization support the modeled thesis.

04 | EXECUTIVE FINANCIAL OVERVIEW – 2027

SPI™ Strategic Market Comparison

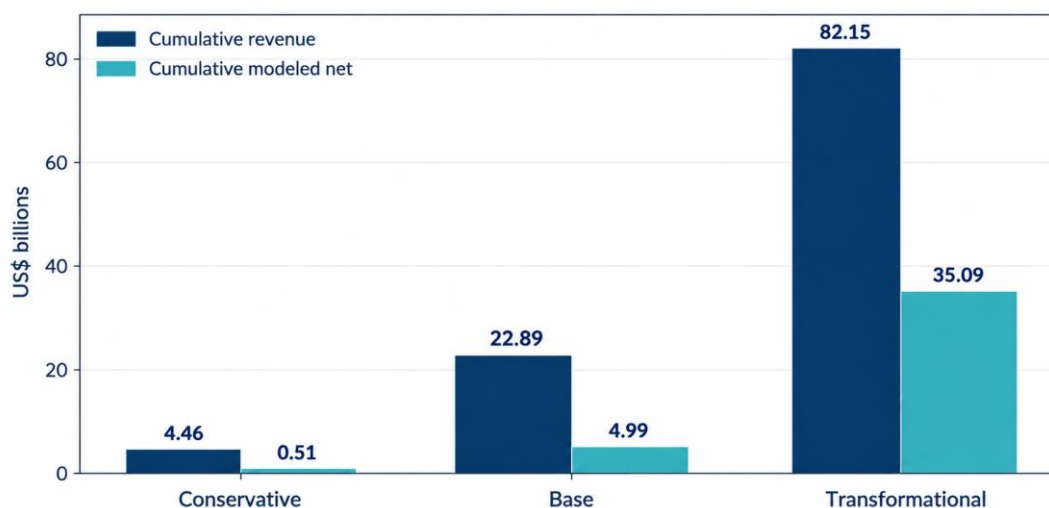
SPI™ is treated as a high-impact program with a separate scenario model and no disclosure of enabling formulation details.



Strategic position

- **SPI™** is framed as an investigational immunoprotective platform that may create value through product courses, indication- or territory-based licensing, co-development, technology transfer and royalties.
- **Its investor thesis** is comparative rather than substitutive: the model evaluates potential positioning alongside existing vaccine and monoclonal-antibody ecosystems without assuming automatic replacement.
- The 2027–2034 model uses Conservative, Base and Transformational cases and explicitly links commercialization to scientific, regulatory, manufacturing and market milestones.

SPI™ Financial Scenarios, 2027–2034



Scenario	Cumulative revenue	Cumulative modeled net	2034 revenue	2034 net margin
Conservative	US\$4.46B	US\$-0.51B	US\$2.00B	6.9%
Base	US\$22.89B	US\$4.99B	US\$11.75B	29.4%
Transformational	US\$82.15B	US\$35.09B	US\$39.00B	45.5%

05 | EXECUTIVE FINANCIAL OVERVIEW – 2027

OBIS Platform Portfolio – 72 Products Across Six Generations – 2027–2034

Portfolio breadth is presented as strategic optionality, diversification and a source of future licensing and program creation across a six-generation architecture.

CURRENT PORTFOLIO FRAMING

The 2027 series uses 72 proposed products organized across six generations as the current platform architecture through the 2034 planning horizon. The portfolio is presented for diversification, prioritization, licensing optionality and staged value creation; the product count is not itself a valuation multiplier.

Portfolio value driver	Investor relevance
Flagship anchoring	LPST [™] provides a focused first commercial/health-economic case while the portfolio supports a broader platform thesis.
Program diversification	Multiple candidate families reduce strategic dependence on a single development outcome.
Licensing optionality	Candidates can support indication-specific, territory-specific or platform-level partnering pathways.
Cross-sector reach	Current portfolio architecture spans respiratory, oncology, neurology, dentistry, veterinary and device-adjacent opportunities.
2034 horizon	The portfolio document maps priority waves, development sequencing and value inflection through the 2027–2034 planning horizon.

Commercial perimeter

- **OBIS Biotech[™]** remains the principal commercial biotechnology platform in the current financial architecture.
- **OBIS Cognition[™]** is excluded from commercial profit consolidation in the internal financial perimeter.
- **PBN/NCS** is modeled separately as long-horizon optionality and should not be automatically added to Biotech valuation or financing rights without a separate framework.

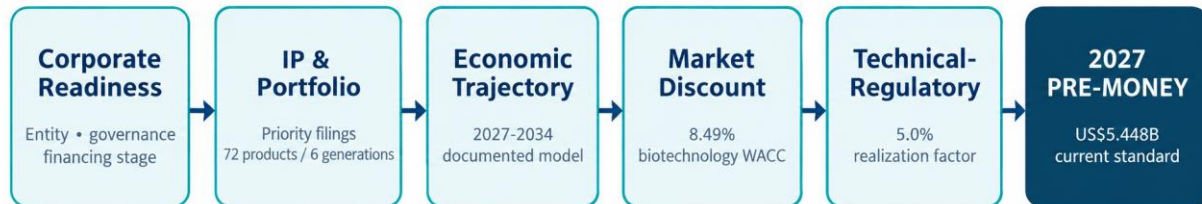
Source / methodology note: The 2027 financial perimeter treats Biotech as the principal commercial platform, excludes Cognition from commercial profit consolidation and keeps PBN/NCS as separately governed long-horizon optionality.

Pre-Money Valuation – 2027

The 2027 valuation is governed by the current formula-driven standard, integrating documented portfolio economics, market discounting, technical-regulatory realization and explicit anti-double-counting rules.

Pre-Money Valuation - 2027

Current formula-driven valuation architecture



Model bridge

Present value before realization adjustment: US\$108.967B | No terminal value beyond 2034 | Anti-double-counting rules apply

PRE-MONEY VALUATION — 2027

Current formula-driven value: US\$5.448 billion

The current OBIS Pre-Money value is produced by the established valuation model rather than selected from a target range. The model discounts the documented 2027–2034 economic trajectory to present value, applies a distinct technical-regulatory realization factor, and preserves anti-double-counting between platform components.

Key current model outputs: US\$108.967B present value before realization adjustment; 8.49% biotechnology WACC; 5.0% current realization factor; US\$5.448B Pre-Money.

Current Valuation Architecture

- Current formula-driven Pre-Money value: US\$5.448B.
- Present value before technical-regulatory realization: US\$108.967B.
- Biotechnology WACC used by the current model: 8.49%.
- Current technical-regulatory realization factor: 5.0%.
- 72 proposed products across six generations are treated as platform breadth, not as a per-product valuation multiplier.
- LPS™ and SPI™ are consolidated under anti-double-counting rules; no terminal value is included beyond 2034.

Governance note: The current valuation remains the approved working standard until material evidence, a documented assumption change or an arithmetic correction justifies recalibration.

Milestones & Value Inflection

The financing thesis is strongest when capital is connected to measurable reductions in scientific, IP, regulatory and execution risk.

Period	Value stage	Illustrative outcome
2027	Definition & protection	Corporate/IP readiness, program prioritization, proof-of-concept planning, seed financing.
2028	Preclinical de-risking	Program-specific validation packages, quality/regulatory preparation, external scientific execution.
2029	Early human evidence	Where supported, first clinical evidence and milestone-based partnering.
2030	Major value inflection	Proof-of-concept / go-no-go decisions; potential licensing and broader platform value.
2031–2034	Scale & partnering	Manufacturing scale, multi-program potential milestone-based licensing, co-development and international alliances.
2034	Portfolio review point	Portfolio-level reprioritization, mature partnering architecture and definition of the next strategic horizon.

Source / methodology note: Timeline synthesizes the financing standard, the SPI™ 2027–2034 milestone model and the portfolio horizon defined for the 2027 series. Actual program timelines remain program-specific.

What creates value

IP	PoC	Reg	Partner	Scale	License
Protection	Evidence	Readiness	Validation	Economics	Optionality

Disclosure Governance & Investor Readiness

The 2027 series is designed to communicate investment value while preserving technical confidentiality and documentary discipline.

NON-DISCLOSURE RULE

No document in this series should disclose the enabling composition, ingredient-level formula, proportions or other replicable formulation details of LPST[™] or SPI[™]. Scientific discussion remains at the level required to understand rationale, differentiation, development status and commercial potential.

Investor-facing discipline

- Separate current corporate facts from forward-looking 2027–2034 scenarios and clearly label modeled assumptions.
- Avoid double counting between LPST[™], SPI[™] and the wider Biotech platform when they are already embedded in portfolio-level models.
- Keep commercial platform economics distinct from corporate valuation.
- Use a single controlled source for 2027 valuation, seed terms and scenario assumptions once approved.
- Treat PBN/NCS as a separate optionality layer unless and until a dedicated investment perimeter is approved.

Core source base used for this overview

Source	Role in 2027 overview
OBIS Internal LPST [™] Commercial & Health-Economic Model	LPST [™] commercial scenarios and system-value sensitivity framework.
OBIS Economic Foundations & Integrated Financial Model 2027–2034 — v1.1	Integrated economics, consolidation rules, capital architecture and valuation methodology.
OBIS Pre-Money Valuation Standard 2027	Formula-driven Pre-Money standard, WACC, realization factor and recalibration governance.
SPI [™] Strategic Market Model – 2027–2034	SPI [™] scenarios and value-inflection milestones.
OBIS Financing Standard – 2026	Seed / Series A structure, allocation, governance and anti-double-counting rules.
OBIS Master Executive Summary – 2026	Integrated OBIS positioning and platform boundaries.
OBIS Strategic Investment Series – 2027	Series architecture, controlled disclosure and 2028 review cycle.

Executive Investment Case – 2027

A concise synthesis of the financial logic that the full 2027 series will substantiate document by document.

INVESTMENT CASE

OBIS presents an asymmetric early-stage opportunity built around a defined seed requirement, a flagship commercial thesis, a high-impact immunoprotection program, a 72-product platform across six generations, a developing IP architecture and multiple potential routes to partnership and monetization. The 2027 series converts those elements into a controlled, reviewable investment framework rather than a single headline projection.

The 2027 standard

- Edition identity: 2027 only; all commercial, market and valuation projections in the investor series begin from 2027.
- Portfolio horizon: OBIS Platform Portfolio – 72 Products Across Six Generations – 2027–2034.
- Valuation: current formula-driven Pre-Money standard of US\$5.448B, recalibrated only when material variables change.
- Scientific confidentiality: no enabling LPST™ or SPIT™ formula details in the investor series.
- Review cycle: next comprehensive review and update in 2028.

OBIS Innovation & Solutions Inc.

One Vision. Three Paradigms. A Shared Future.

Executive Financial Overview – 2027 | Current investor-series document | Next comprehensive review: 2028