



OBIS Use of Funds, Milestones & Value Inflection – 2027

Seed Capital Deployment Framework for De-Risking, Execution and Value Creation

SEED CAPITAL

US\$1.2M

CURRENT PRE-MONEY

US\$5.448B

NEXT CAPITAL GATE

Series A readiness

OBIS Innovation & Solutions Inc.

PUBLIC INVESTOR MATERIAL · Prepared for the 2027 investment cycle

Executive Capital Deployment Statement

The seed round is designed to convert capital into measurable readiness, evidence and decision-quality rather than near-term commercial scale.

2027 CAPITAL THESIS

The US\$1.2M seed mandate is a de-risking and readiness round. Its purpose is to strengthen corporate, IP, scientific, regulatory, operating and investor-readiness foundations so that subsequent financing can purchase acceleration rather than unresolved uncertainty.

Capital with purpose

Every budget category is linked to an identifiable capability, milestone, evidence package or reduction of risk.

Value through de-risking

Value inflection is expected as uncertainty falls through documented progress in IP, technical execution, quality/regulatory planning and external validation.

Milestones before scale

Seed capital supports proof-of-concept planning, protection and readiness; it does not finance mass commercialization or heavy infrastructure.

Series A as the next gate

The seed phase is complete only when OBIS can present a coherent package for a separate institutional Series A process.

Seed deployment priorities

- Protect the current biotechnology platform and preserve clear investment boundaries.
- Advance early R&D and proof-of-concept work under defined protocols, budgets and acceptance criteria.
- Build regulatory, quality and documentation readiness before larger clinical and CMC commitments.
- Establish the minimum operating capability required to coordinate science, finance, governance and external partners.
- Prepare a controlled data room, investor materials and a Series A-ready evidence package.

VALUATION CONTEXT

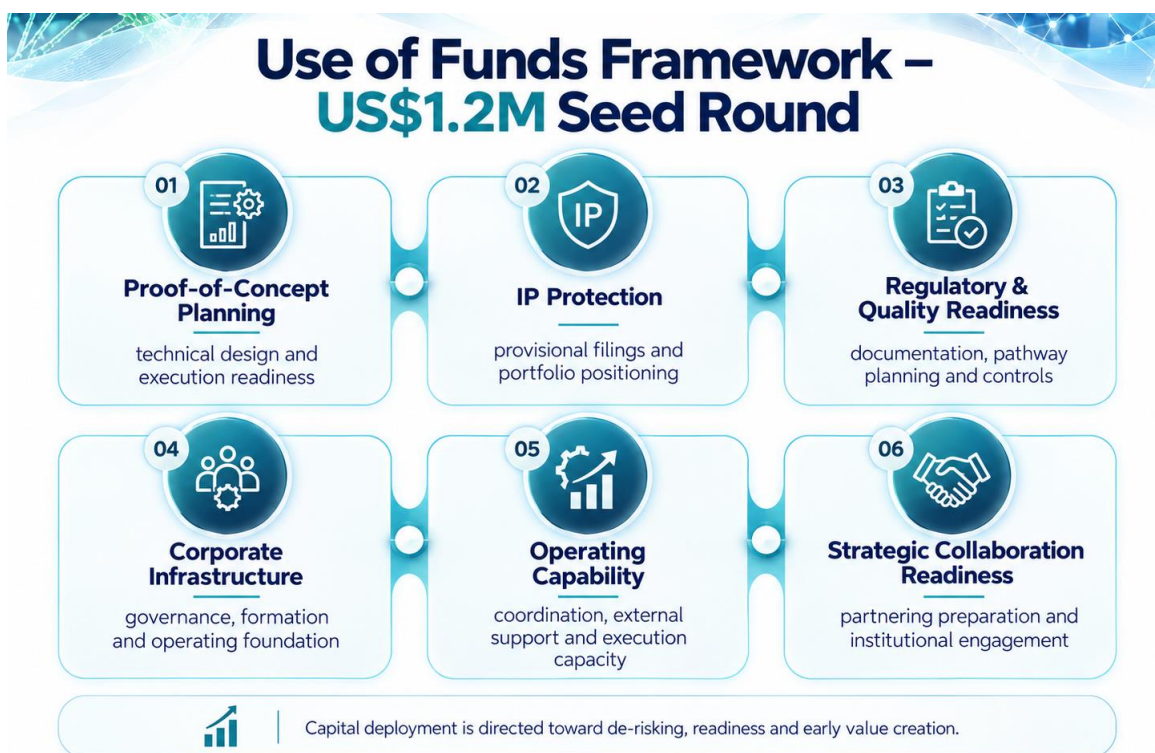
OBIS currently communicates a 2027 Pre-Money Valuation of US\$5.448 billion, derived from the current formula-driven standard. The seed round is not the source of that value; it finances milestones that can recalibrate and strengthen its transaction quality.

Use of Funds – US\$1.2M Seed Round

The financing structure established in the 2027 series is preserved; this document maps each allocation to its expected output and value effect.

Category	Amount	Share	Primary output
Early R&D and proof of concept	US\$400,000	33.3%	Prioritized studies, protocols and traceable data packages
Regulatory and quality preparation	US\$200,000	16.7%	Regulatory roadmap, quality systems, CMC/pre-IND preparation
Minimum team and operations	US\$200,000	16.7%	Essential coordination, finance, administration, insurance and execution support
Corporate / legal / tax / financial	US\$150,000	12.5%	Governance, cap table, contracts, tax and financial controls
IP and protection strategy	US\$150,000	12.5%	Priority filings, portfolio positioning and controlled disclosure
Central contingency	US\$60,000	5.0%	Controlled reserve for approved variances
Investor materials / data room	US\$40,000	3.3%	Secure diligence package and controlled investor access
TOTAL	US\$1,200,000	100.0%	Seed mandate

Note: Individual percentages are rounded to one decimal place; totals may differ slightly due to rounding.



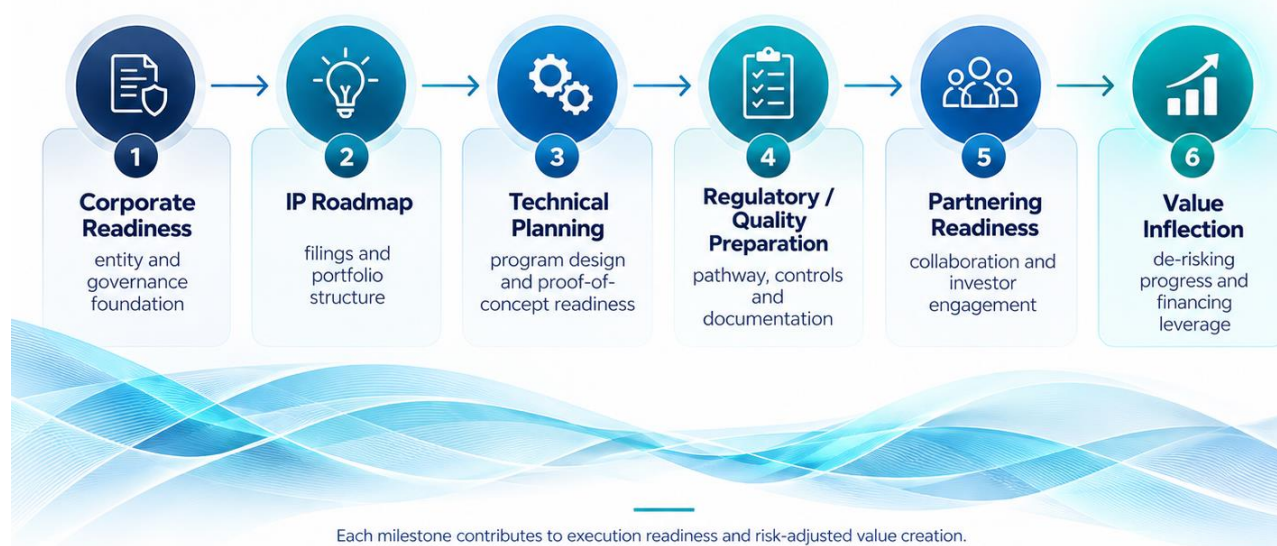
Allocation principle: the budget is a planning baseline, not automatic authorization to spend; category timing remains subject to scope, quotations, scientific priority and formal approval.

Milestone Architecture – S0 to S4

The seed phase is governed by evidence gates rather than by the passage of time or depletion of cash.

Gate	Evidence of completion	Decision / value effect
S0 – Preparation	Entity, investment perimeter, cap table, IP ownership chain, legal route and current financial model are defined.	Authorize controlled investor contact and execution.
S1 – Protection	Executable IP strategy, confidentiality controls and collaborator agreements are in place.	Permit limited technical disclosure under approved controls.
S2 – Proof of concept	Traceable data generated under protocol, with predefined limits and review.	Continue, repeat, redesign or stop specific work.
S3 – Regulatory / quality	Regulatory route, CMC/quality gaps, cost assumptions and pre-IND strategy are documented.	Define the institutional development package.
S4 – Series A Ready	Data room, updated valuation, US\$100M budget architecture, cap table and syndication strategy are coherent.	Authorize the next financing stage.

2027 Development Milestones & Value Inflection



MILESTONE DISCIPLINE

A gate is not considered complete because funds were spent. Completion requires the defined documentary, scientific, regulatory, governance or transaction evidence associated with that gate.

Capital-to-Milestone Mapping

Each allocation supports one or more gates; the objective is to show how capital deployment changes execution readiness and risk perception.

Capital line	Primary gate	Expected evidence / output	Expected value effect
US\$400k R&D / PoC	S2 – Proof of concept	Protocols, assays, comparative data, reproducibility package	Reduces core technical uncertainty and informs go/no-go decisions.
US\$150k IP	S1 – Protection	Priority filings, portfolio map, disclosure controls	Strengthens protectability and transaction perimeter.
US\$200k Regulatory / quality	S3 – Regulatory	Pathway, CMC/quality gaps, advisor package	Improves visibility on execution sequence, evidence and future capital needs.
US\$150k Corporate / legal / finance	S0 – Preparation	Governance, cap table, contracts, finance/tax controls	Reduces transaction and ownership ambiguity.
US\$200k Team / operations	S0–S4 enabling layer	Execution coordination and minimum operating capacity	Improves ability to convert plans into controlled deliverables.
US\$40k Data room / investor materials	S4 – Series A Ready	Diligence package, controlled access, investor Q&A	Improves financing readiness and review efficiency.
US\$60k Contingency	Cross-cutting	Authorized response to documented variance	Protects execution continuity without weakening budget control.

READING DISCIPLINE

The value effect is directional, not a guaranteed increase in enterprise value. The mechanism is de-risking: better evidence, clearer rights, stronger governance and improved financing readiness can support a higher-quality valuation discussion and better transaction terms.

Value Inflection Pathway

The 2027 seed thesis links capital to a sequence of de-risking events that can strengthen the quality of the company's current valuation and future financing position.



What changes value perception

- Corporate readiness: a defined issuer, governance structure, cap table and investment perimeter.
- IP protection: priority filings, ownership clarity and disciplined technical disclosure.
- Reproducible evidence: data that can be reviewed, repeated and tied to predefined go/no-go criteria.
- Regulatory and quality readiness: a clearer path from early science to controlled development.
- External validation: credible institutions, research partners or qualified reviewers engaging with the evidence.
- Financing leverage: stronger diligence quality, clearer use of capital and a more credible transition to Series A.

CURRENT VALUATION REFERENCE

The current Pre-Money Valuation is US\$5.448 billion under the formula-driven standard. Seed-stage milestones do not generate predetermined increases; they activate documented recalibration when material evidence is sufficient.

Deployment Controls & Decision Discipline

The use-of-funds framework protects both execution quality and investor confidence by preventing capital from becoming an open-ended spending pool.

Scope before spend

No material study, filing, advisory engagement or operating commitment should begin without defined scope, budget, owner and acceptance criteria.

Contingency governance

The US\$60k central contingency is a controlled reserve and should require a documented rationale and authorization.

Single financial truth

All investor-facing figures should reconcile to the approved 2027 model, budget and valuation references.

Gate-based sequencing

Later work should not be funded merely because budget remains; it advances when the preceding evidence gate supports continuation.

No forced acceleration

The seed mandate should not be stretched into mass commercialization, heavy infrastructure or large clinical commitments outside the agreed perimeter.

Protected disclosure

Capital deployment does not change the confidentiality perimeter for enabling technical information or unprotected IP.

Decision outcomes at each gate

Outcome	Meaning	Capital response	Portfolio response
Advance	Evidence meets criteria	Release approved next work	Continue / expand
Repeat	Evidence incomplete but tractable	Fund defined repeat only	Hold priority
Redesign	Assumption or method needs revision	Reallocate within approved limits	Re-rank / re-scope
Stop	Evidence fails or risk becomes unacceptable	Protect remaining capital	Deprioritize / terminate

Investor Reporting & Evidence Dashboard

A disciplined seed round should make progress visible through a limited set of reviewable indicators rather than narrative claims alone.

Dashboard area	Evidence to report
Corporate / governance	Entity records, board/authority decisions, cap table status, contracts, tax/financial controls.
IP	Priority filings, ownership assignments, disclosure log, outside-counsel status and portfolio map.
Scientific	Protocol status, datasets generated, reproducibility, predefined decision criteria and unresolved questions.
Regulatory / quality	Roadmap, CMC gaps, quality documents, advisor conclusions and agency-interaction readiness.
Finance	Budget vs. actual, committed vs. spent, remaining contingency, forecast runway and variance explanations.
Partnering / financing	Qualified interactions, diligence stage, requests received, data-room access and Series A preparation status.

REPORTING PRINCIPLE

Investor reporting should explain what changed, what evidence now exists, what remains uncertain, how much capital was used and what decision follows. Progress is strongest when claims, documents, data and financial deployment reconcile to the same controlled record.

Suggested review rhythm

- Monthly internal budget and execution reconciliation.
- Milestone-based investor updates when a gate is completed or materially changes.
- Immediate documentation of material variance, failed gate, scope change or contingency use.
- Formal Series A readiness review only after S4 evidence is complete.

Seed Completion & Transition to the Next Financing Stage

The seed phase culminates in a stronger evidence package and financing position; it does not merge automatically into the later US\$100M Series A mandate.

SEED COMPLETION STANDARD

The seed phase is complete when OBIS can demonstrate a coherent corporate and IP perimeter, a traceable early evidence package, regulatory/quality readiness, a controlled investor data room, an updated valuation and a financing plan capable of supporting a separate Series A decision.

Readiness dimension	Seed-to-Series A requirement
Corporate	Issuer, governance, cap table and ownership chain are coherent.
IP	Priority protection strategy and controlled disclosure are implemented.
Scientific	Preclinical/PoC evidence is traceable, with explicit remaining gaps.
Regulatory / CMC	Development pathway, quality requirements and cost drivers are defined.
Financial	US\$1.2M deployment reconciled; updated model, runway and valuation are approved.
Transaction	Series A instrument, syndication approach, diligence package and authority are ready.

Executive conclusion

The US\$1.2M seed round is a capital-efficiency instrument: it is designed to convert selected uncertainties into defined evidence, rights, controls and readiness. The expected result is not immediate commercial scale, but a more defensible, executable and financeable OBIS platform positioned for higher-quality institutional review and the next stage of capital formation.

Core source base

- OBIS Executive Financial Overview – 2027: seed mandate, valuation context and series-level capital architecture.
- OBIS Pre-Money Valuation – 2027: current formula-driven Pre-Money standard of US\$5.448B and milestone-based recalibration framework.
- OBIS Seed Financing Structure – US\$1.2M – 2027: financing perimeter, instrument discipline and transition logic.
- OBIS Financing Standard V1.0 – 2026: seed budget, milestone gates, governance and Series A transition requirements.
- OBIS Financial Information Summary – 2026: original US\$1.2M planning allocation and disclosure discipline.

REVIEW CYCLE

Next comprehensive review and update: 2028, or earlier if financing terms, quotations, program priorities, IP status or milestone evidence materially change the seed architecture.