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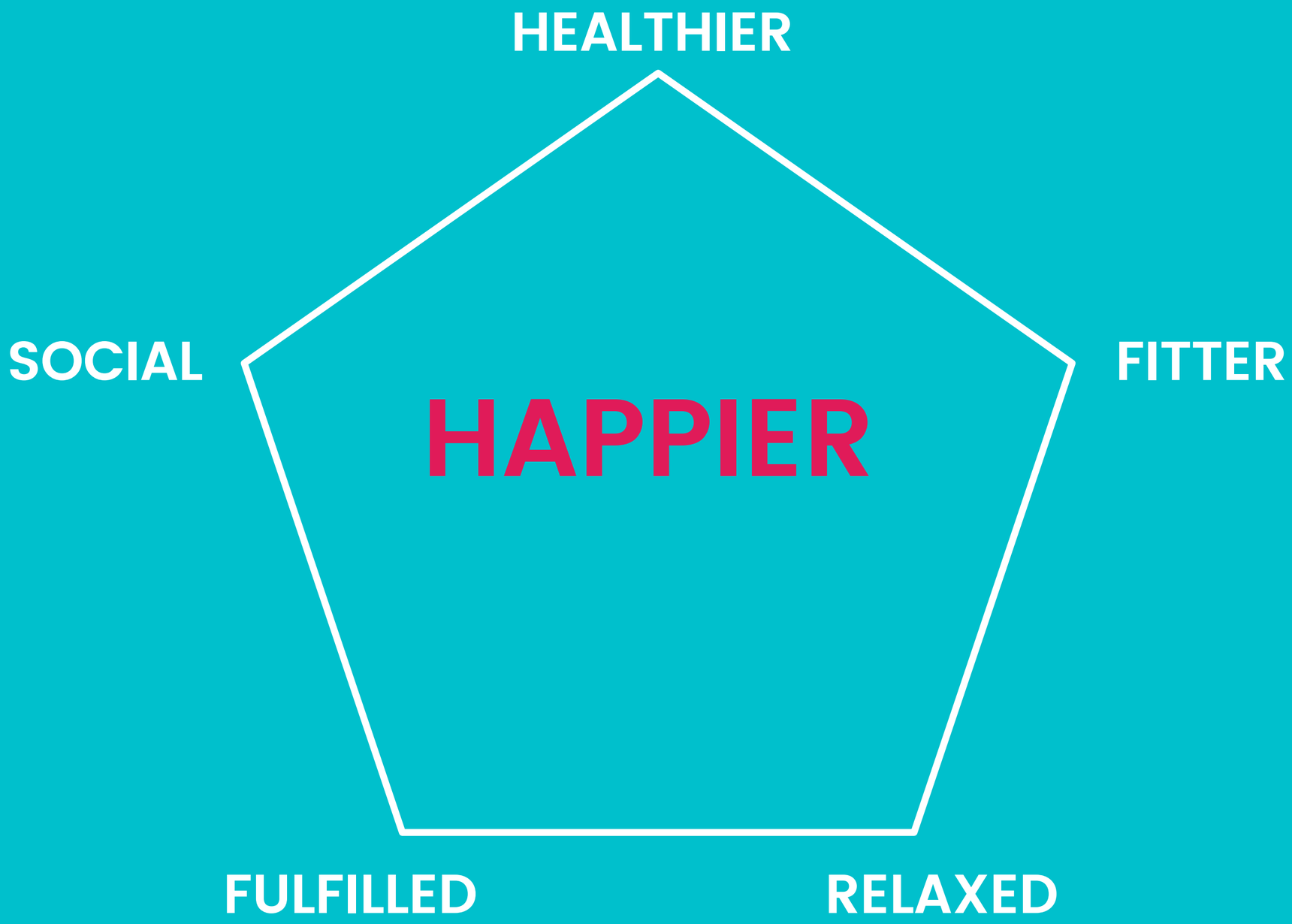
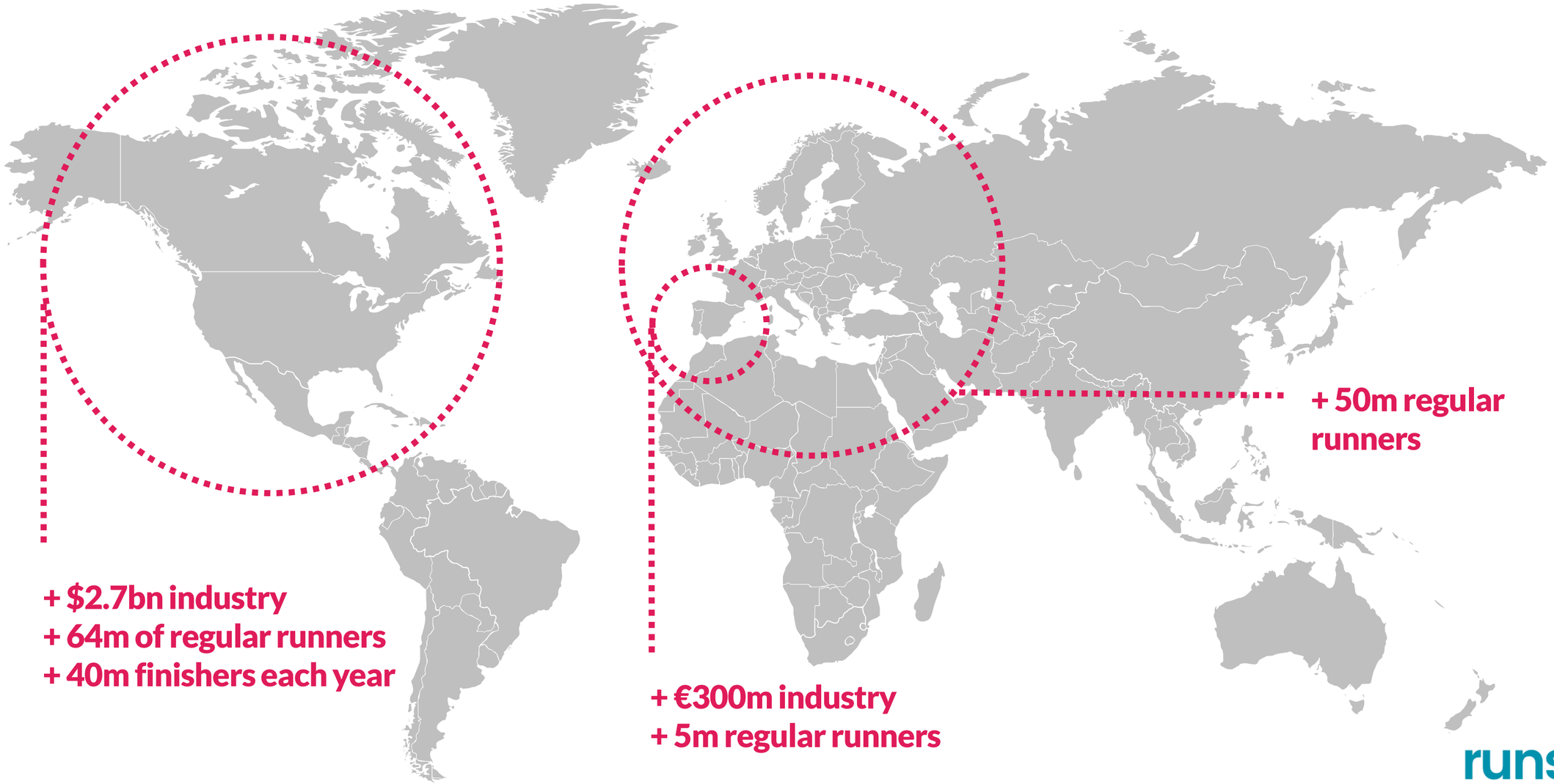
Your running mentor

What would you say if I told you that I have found an enjoyable way for you to make your ultimate goals in life come true?


HEALTHIER
SOCIAL
FITTER
HAPPIER
FULFILLED
RELAXED

This is what running is doing to millions of people globally and why it is becoming a lifestyle



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But the question remains, are you really enjoying it?

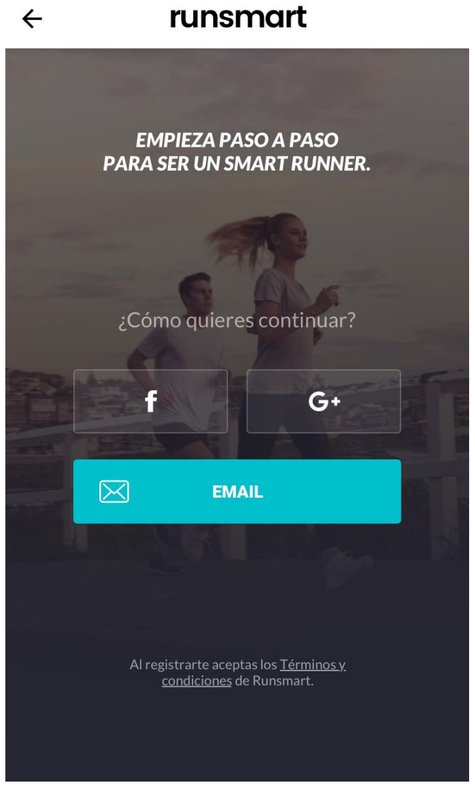
Injuries	50-70% of regular runners get injured every year
Unsustainable sacrifices	Rigid plans, diet, pain, losing sleep…
Stagnation	80% of your training will not get you too far
Unbalanced run-life	Many runners struggle to keep a balanced life with family and friends

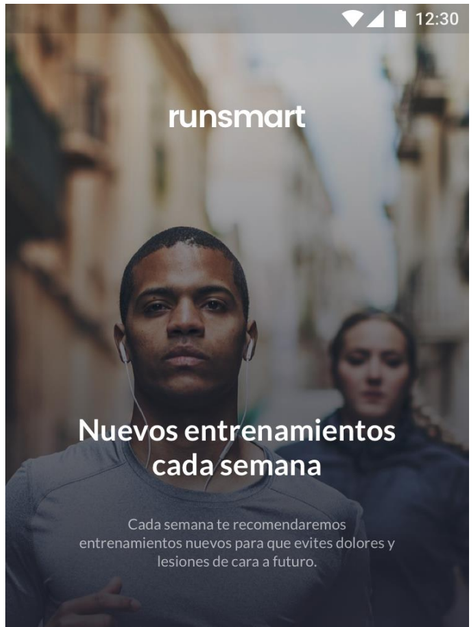
Happiness is at stake here people!

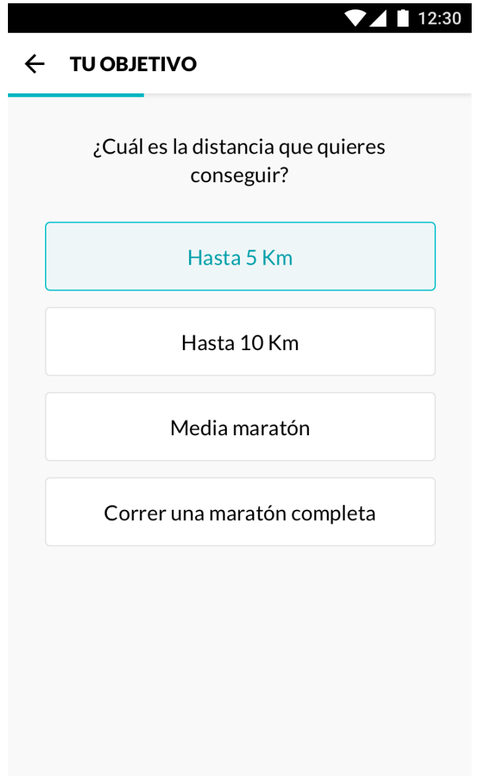
This is not another running app

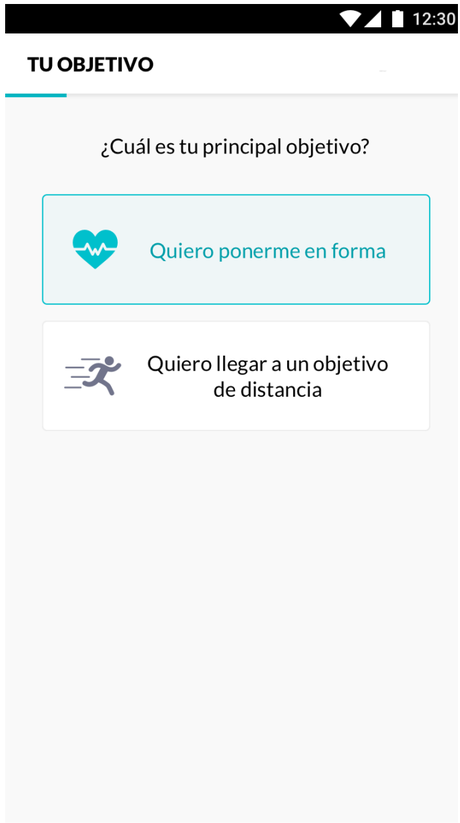
This is your AI-powered running mentor that really gets you and empowers you to go back to enjoying running again:

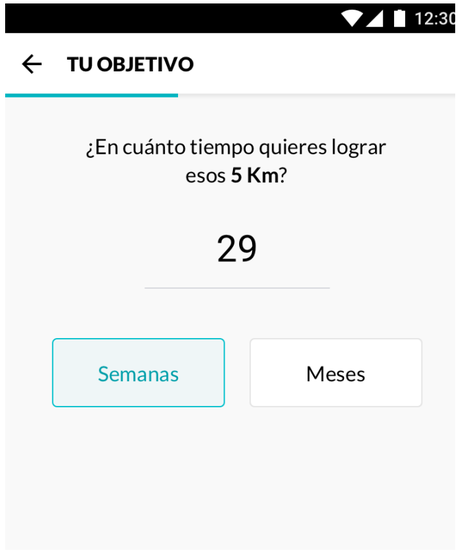
1. Learns from you 24x7
2. Adapts to your needs and lifestyle
3. Make sure you do not get injured and achieve your goals
4. Designs highly personalized weekly running plans customized to your needs
5. Got you covered with a holistic approach based on scientific expertise











Why Runsmart?

Full integration with most popular running trackers

The Health & Fitness app segment is booming…

Timing	App usage have increased usage by +330% in the last three years
Data	Most popular apps are running trackers, but runners struggle to extract useful insights
Convenience	A more personalized and entertaining experience anytime / anywhere
Business model	Freemium models have seamlessly integrated into users' lives
Market growth	The segment generated c.$1bn revenues in 2017 with 30% annual growth expected until 2021

The future is smart coaching

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How are we going to make money?

FREEMIUM MODEL

Premium: higher personalization
Monthly €7.95 (€60 if paid annually in advanced)
5% conversion from total user base

Pro: human interaction
Monthly €19.95 (€99.95 if paid annually in advanced)
1% conversion from total user base

AFFILIATION

Lead generation (running shoes online shops, offline services, race inscriptions…)

Partnerships with brands (gyms, insurance companies, running clubs…)

Selective advertising & gamification

CORE

ANCILLARY

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How are we going to sell it?

Length

10 weeks plan from pre to post launch

Action plan

1) Create awareness
2) Reach Top 10 Health & Fitness category
3) Retain active users + new users acquisition

Focus

1) Running forums
2) Social Media / Bloggers
3) Micro-influencers
4) Race and gym sponsorship
5) SEM / Paid ads

Target

6ok downloads / €60k cost

RUNNER'S WORLD

Conversations already started for a partnership in September 2018

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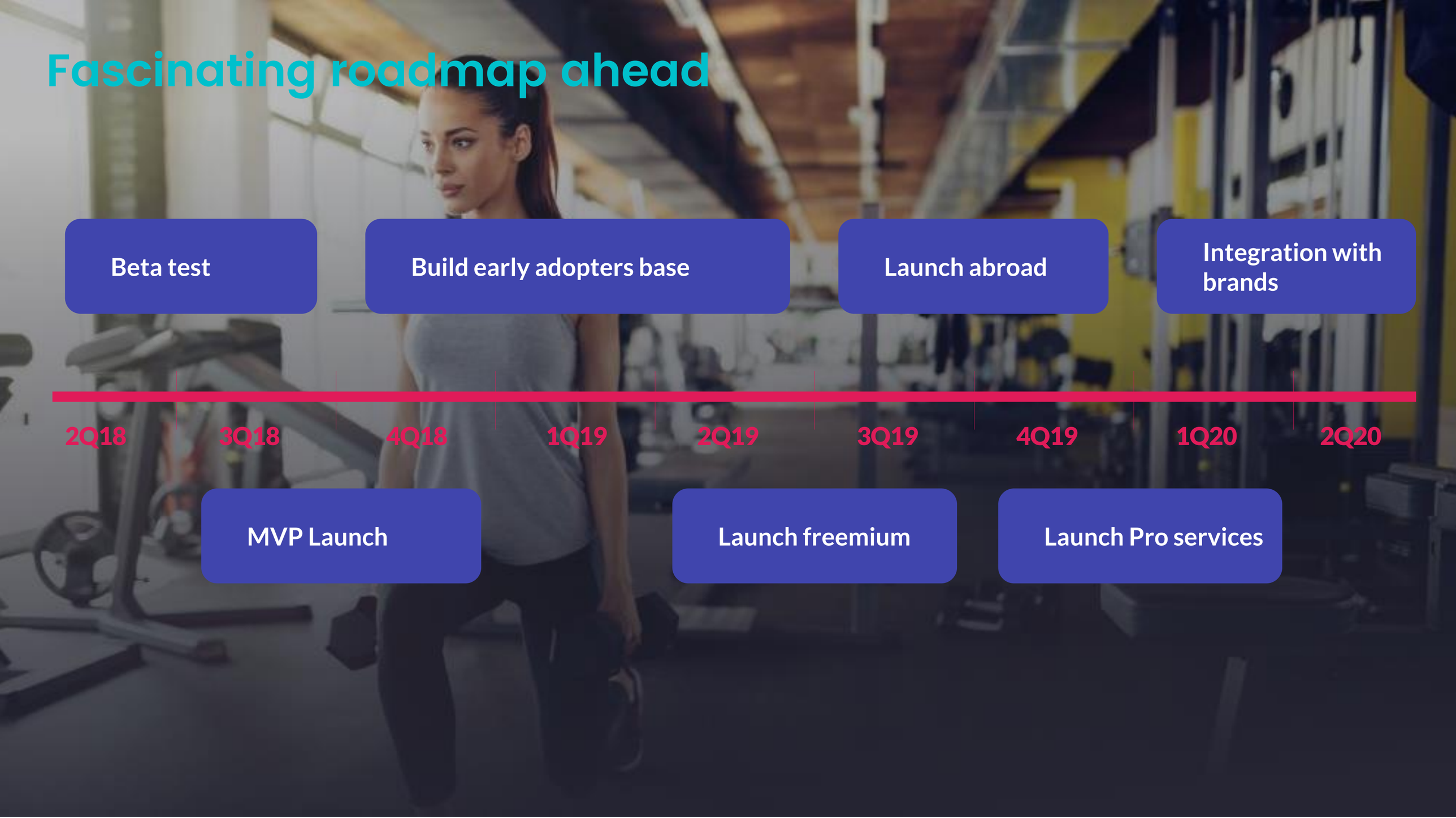
Fascinating roadmap ahead



+ 10 years of Startup experience combined

Startup experience

INVEREADY Technology Investment Group

SOUTH SUMMIT INNOVATION IS NOW!

milanuncios

WOOM TECH FOR FERTILITY

Global Sports Innovation Center

Powered by Microsoft

eye os

iVitalia.com & MARCA

¡SE UNEN!

RUNNING

iAltitude

Combined expertise

+30 years training runners

+20 years in software development

+10 years training Olympic athletes

+10 years collaborating with runners media

+10 years developing mobile projects

+10 years in Private Equity & Venture Capital

+3 years in Brand Strategy

Carlos Floria
CEO

Santiago Rodriguez
CMO

Francisco Javier Raya
CTO

David Cabezas
Lead Mobile developer

Juan Carlos Granado
Former Olympic coach

Fernando Lozano
Former Olympic coach

Carmen Meixide
Project Manager

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Tier 1 advisors from the industry

Alex Calabuig

Managing Director - Runner's World Spain magazine

Leading running magazine in the world. Journalist, runner and scriptwriter of the running movie Fiz: Pure Marathon

Rodrigo Miranda

Managing Director – Partner ISDI

Member of IMPACT Accelerator Board of Advisors - Startup Mentor. Passion for Triathlon, Ironman and Trail running

Pablo Floria

Phd Sports Biomechanics – Pablo Olavide University

+15 years experience working in High Performance Sports Centres and running technique universities

Andreu Alfonso

Lead Director – High Performance Digital Teams program at ISDI

+10 years experience as a Technical Director in the Spanish Triathlon Federation. Head of Sports at Villa de Madrid Country club

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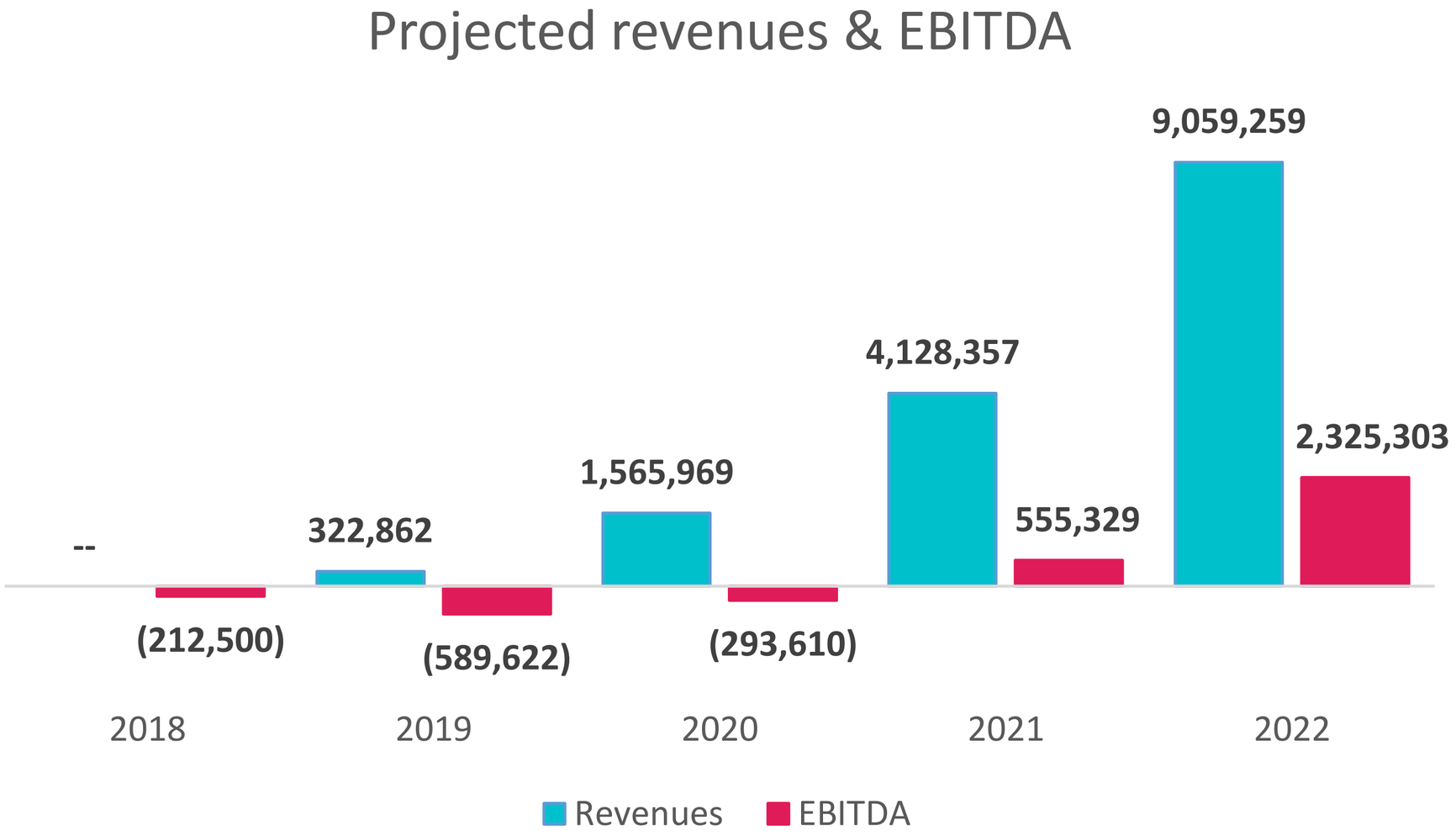
Assuming 1% of paying users vs total runners in the market



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We have just launched a FFF's round to close in 2Q18

We are looking to complement the founders' initial equity of €100k + Avalmadrid loan of €60k with:

1) **€100k from family, friends and fools in the form of a Convertible Note**

2) **€75k from ENISA participating loan (submitted)**

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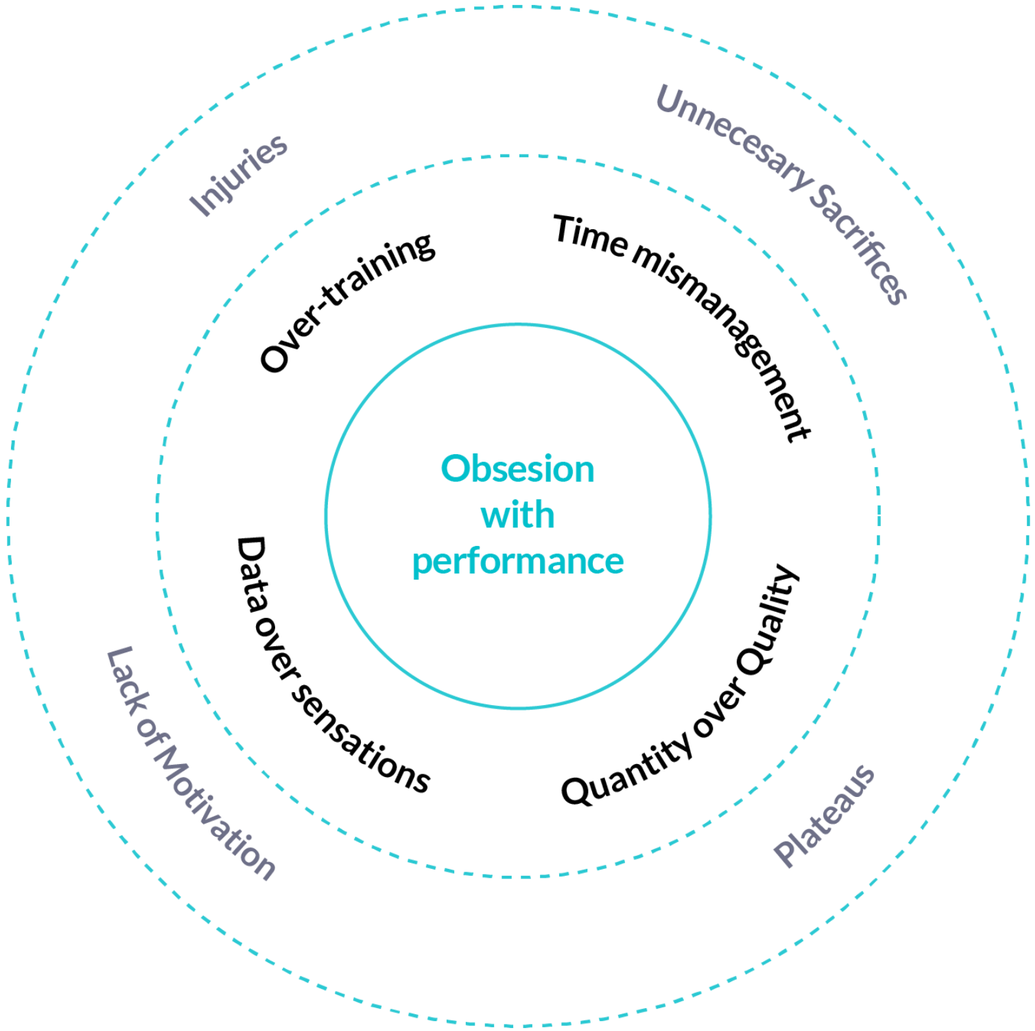
For further information on becoming an investor please contact:

Carlos Floria
635 98 10 40
carlos@runsmart.es

Other running is possible



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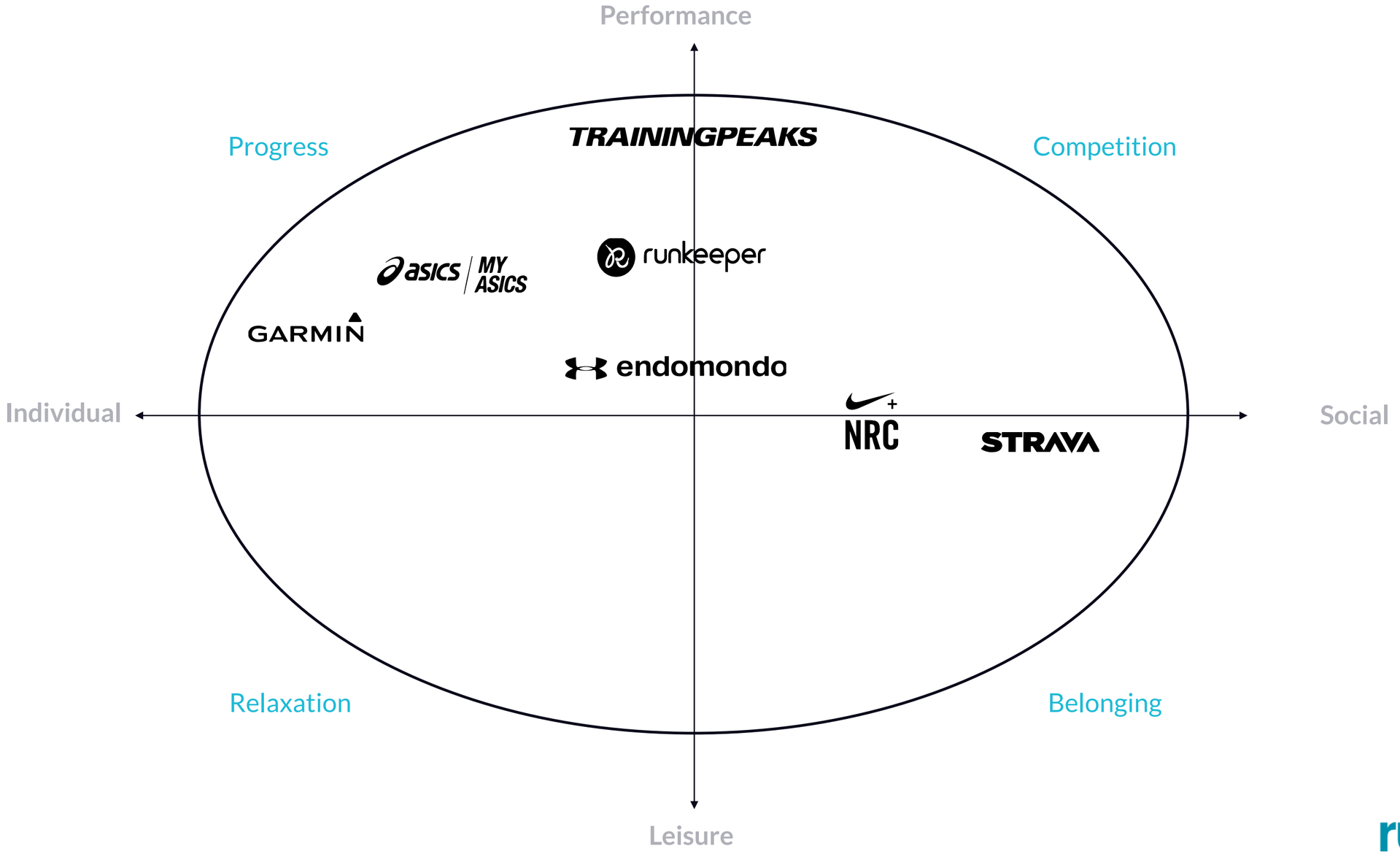
Competition mainly trackers focused on performance



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Product roadmap

MVP

1. Analysis/ Diagnosis of the user's current form/ objective.

2. Custom recommendations and notifications according to the collected data from training.

3. Tailored strength training for injuries/ muscle deficiency.

Training

Development of customized, adaptive and automated training plans.

PRO service

Introduction of Premium Service with access to trainers, physical therapists and medical professionals.

Biomechanical Analysis

Automated biomechanical analysis using Machine Learning.

Business Units

New Business: Sneaker leads, offline services, Insurances, Running Clubs, B2B version for sport and medical professionals.

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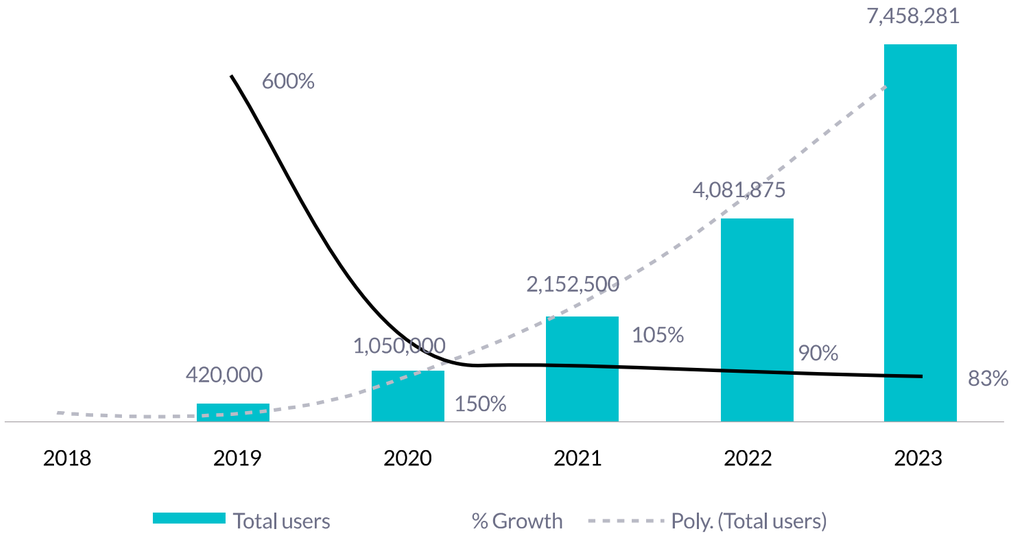
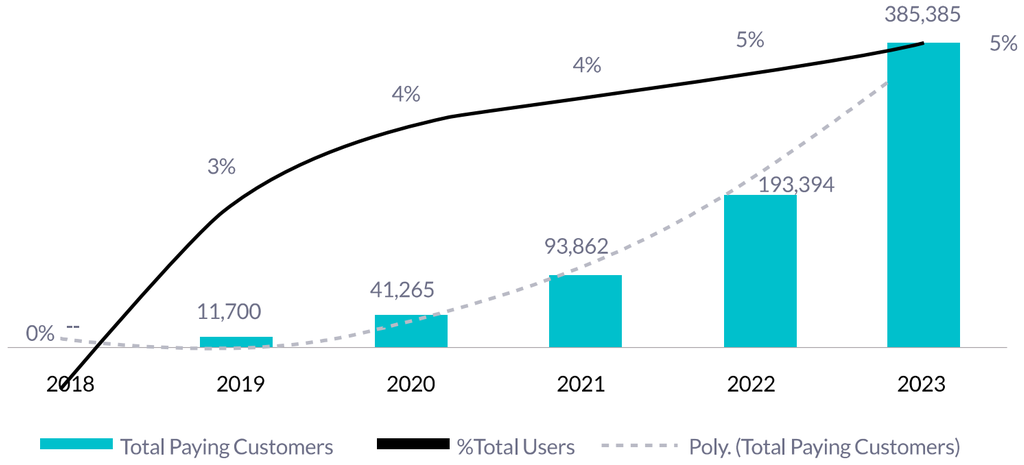
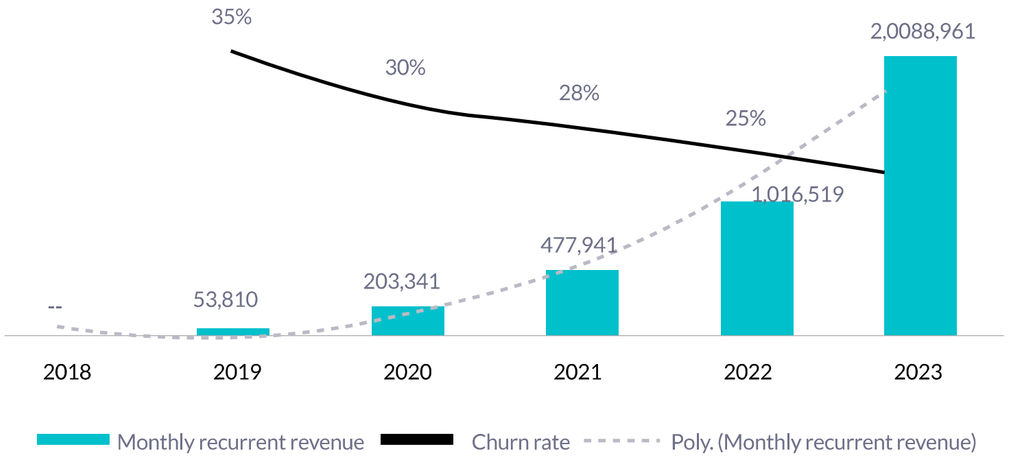
Total Users



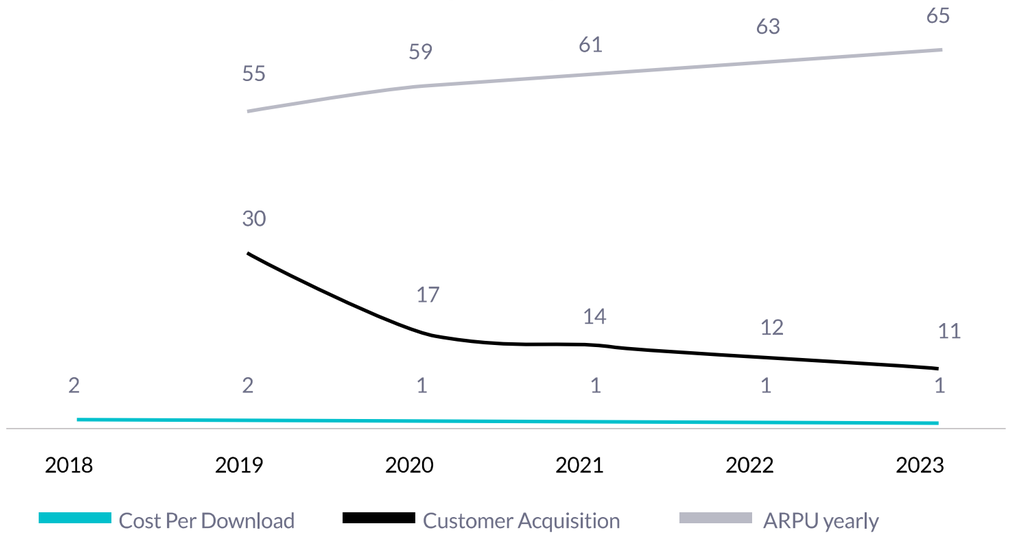
Paying Customers



Monthly Recurrent Revenue



CPI/CAC/ARP



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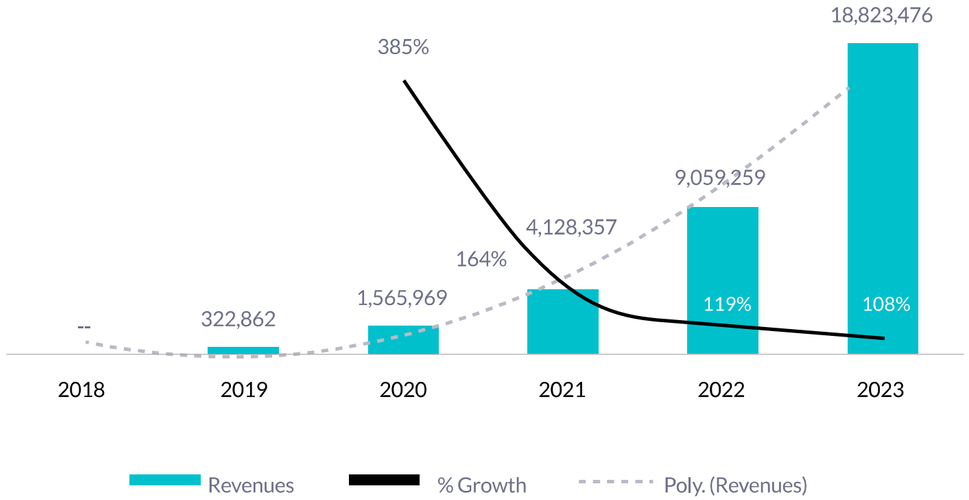
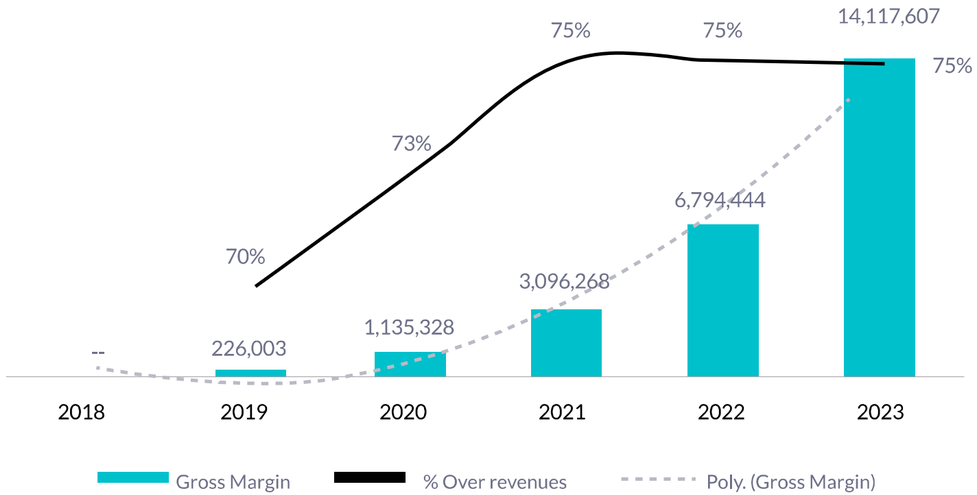
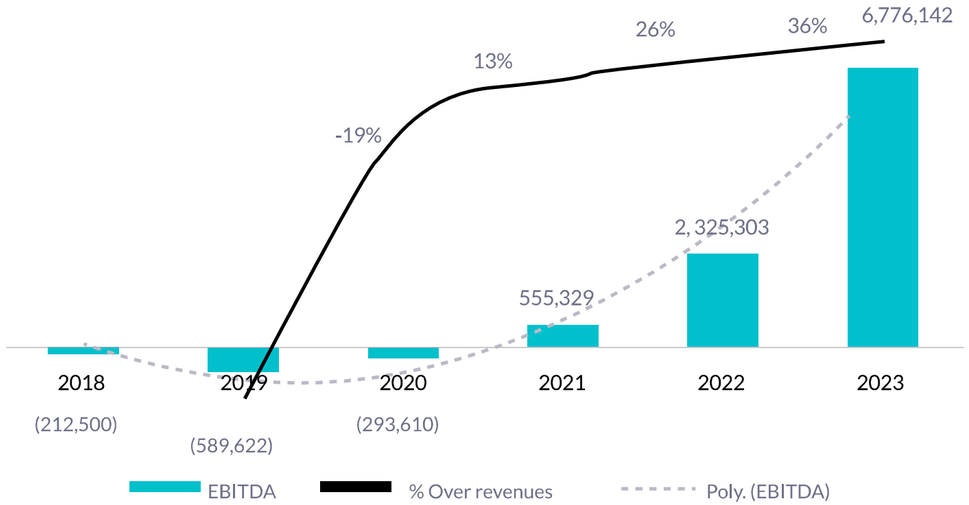
Revenue Projections



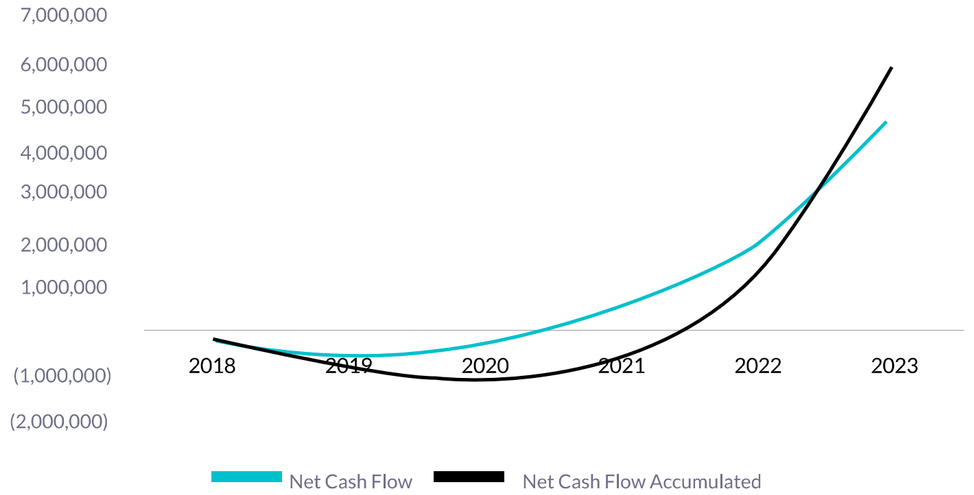
Gross Margin Projections



Ebitda Projections



Cash Needs Projections



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KPI's

Conversion funnel	2018E	2019E	2020E	2021E	2022E	2023E
New Installs	60,000	360,000	630,000	1, 102,500	1, 929,375	3, 376,406
Growth		500%	75%	75%	75%	75%
Cumulative Installs	60,000	360,000	630,000	1, 102,500	1, 929,375	3, 376,406
New paying customerss	--	18,000	47,250	88,200	163,997	303,877
Conversion						
Instals > paying cust.	0.0%	5.0%	7.5%	8.0%	8.5%	9.0%

Paying Customers

	2018E	2019E	2020E	2021E	2022E	2023E
BoP	--	--	11,700	41,265	93,862	193,394
New paying customers	--	18,000	47,250	88,200	163,997	303,877
Churn	--	(6,300)	(17,685)	(35,603)	(64,465)	(111,886)
% Churned	0.0%	35.0%	30.0%	27.5%	25.0%	22.5%
EoP	--	11,700	41,265	93,862	193,394	385,385
Paying customers over total installs	0.0%	2.8%	3.9%	4.4%	4.7%	5.2%

LTV

LTV	2018E	2019E	2020E	20201	2022E	2023E
LTV	na	110	143	167	189	217
Gross profit per paying customer	--	39	43	46	47	49
ARPU annual	--	55	59	61	63	65
Churn	0.0%	35.0%	30.0%	28.0%	25.0%	20.5%
LTV/CAC		3.7X	8.6X	11.6X	15.3X	20.5X

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Unitary Costs

Unitary Costs	2018E	2019E	2020E	2021E	2022E	2023E
CPI - Blended	(1.5)	(1.5)	(1.3)	(1.2)	(1.1)	(1.0)
yoy	0.0%	0.0%	-16.7%	-8.0%	-8.7%	-9.5%
CAC	na	(30)	(17)	(14)	(12)	(11)
yoy	0.0%	na	-44.4%	-3.0%	-3.0%	-3.0%

ARPU

	2018E	2019E	2020E	2021E	2022E	2023E
ARPU - yearly	--	79	79	79	79	79
Promotion	0.0%	30.0%	25.0%	22.5%	20.0%	17.5%
Actual ARPU - yearly	--	55	59	61	63	65
yoy	--	na	7%	3%	3%	3%

P&I

	2018E	2019E	2020E	2021E	2022E	2023E
Revenues	--	322,862	1, 565,969	4, 128,357	9, 059,259	18, 823,476
yoy	na	na	385%	164%	119%	108%
Marketing costs	(90,000)	(540,000)	(787,500)	(1, 267,875)	(2, 025,844)	(3, 207,586)
yoy	na	500%	46%	61%	60%	58%
Gross Margin	--	226,003	1, 135,328	3, 096,268	6, 794,444	14, 170,607
% revenues	70.0%	70.0%	72.5%	75.0%	75.0%	75.0%
Personnel - Structure	(97,500)	(341,250)	(716,625)	(1, 379,503)	(2, 719,592)	(4, 170,041)
FTE	3	10	20	35	60	80
Average Salary	(32,500)	(34,125)	(35,831)	(39,414)	(45,327)	(52,126)
% growth		5%	5%	10%	15%	15%

Totals

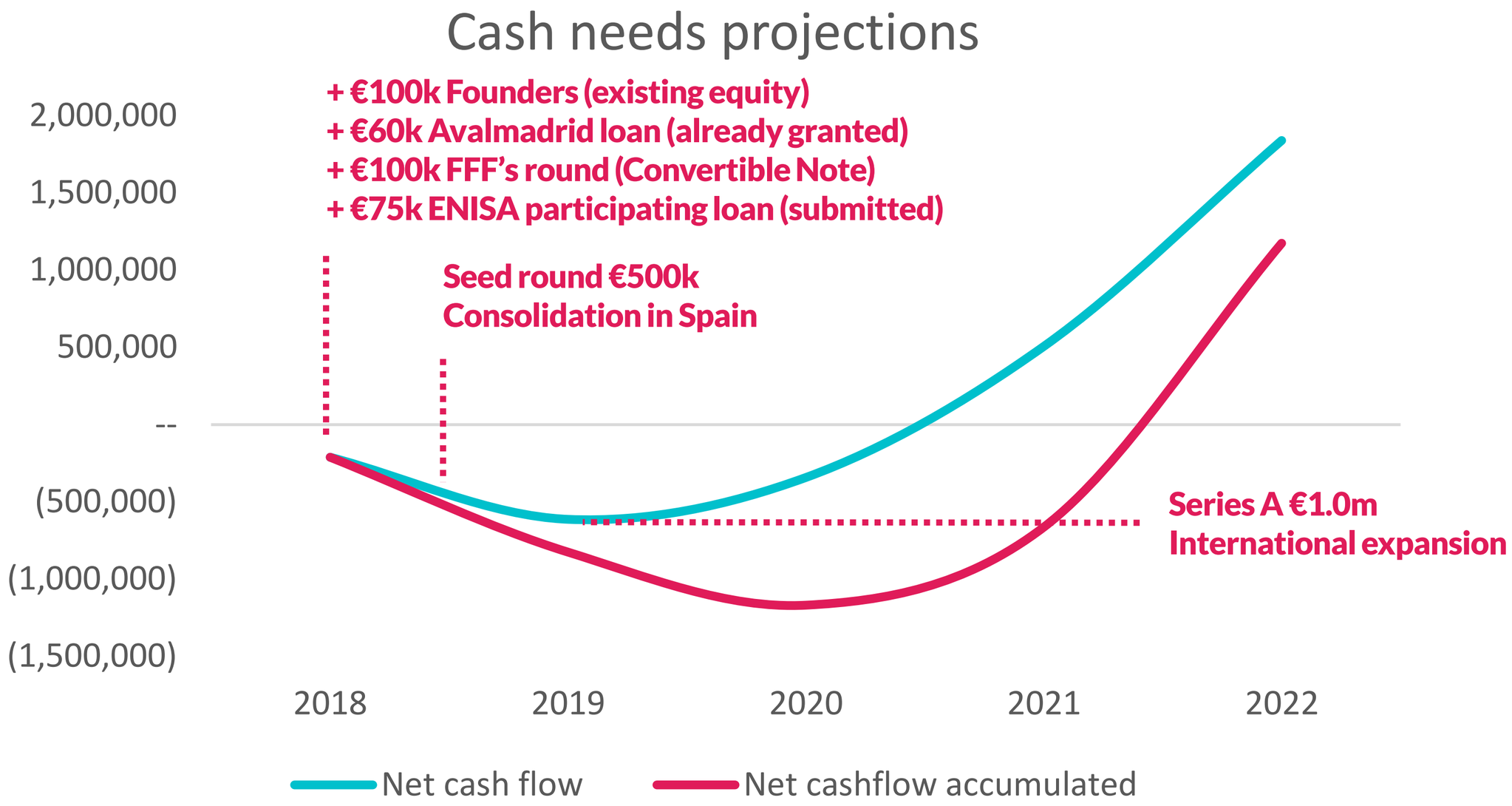
	2018	2019	2020	2021	2022	2023
Total Users	60,000	420,00	1, 050,000	2, 152,500	4, 081,875	7, 458,281
% growth		600%	150%	105%	90%	83%

	2018	2019	2020	2021	2022	2023
Total paying customers	--	11,700	41,265	93,862	193,394	385, 385
% Total Users	0%	3%	4%	4%	5%	5%

	2018	2019	2020	2021	2022	2023
Monthly recurrent revenue	--	53,810	203,341	477,941	1, 016,519	2, 088,961
Churn rate		35%	30%	28%	25%	23%

	2018	2019	2020	2021	2022	2023
Cost per download	2	2	1	1	1	1
Customer acquisition cost		30	17	14	12	11
ARPU yearly		55	59	61	63	65

Projected financing needs over next two years



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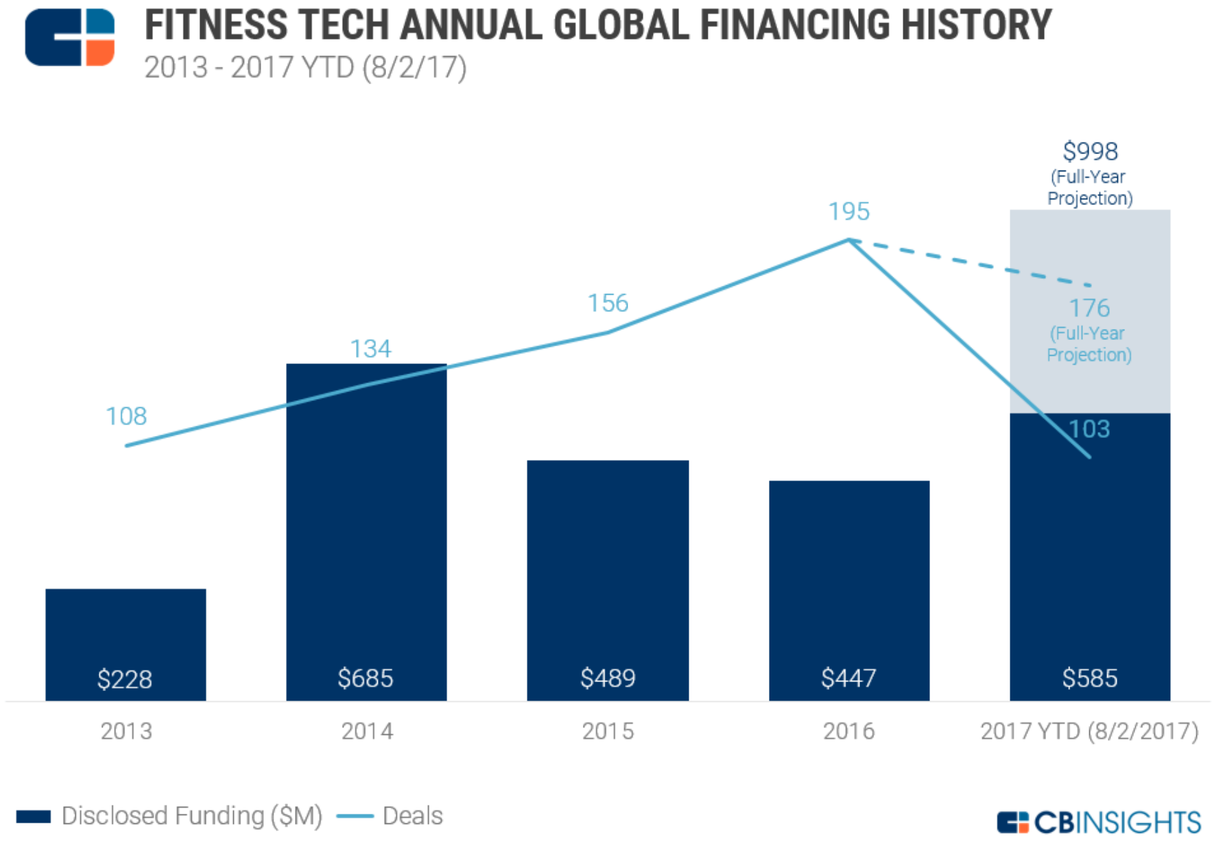
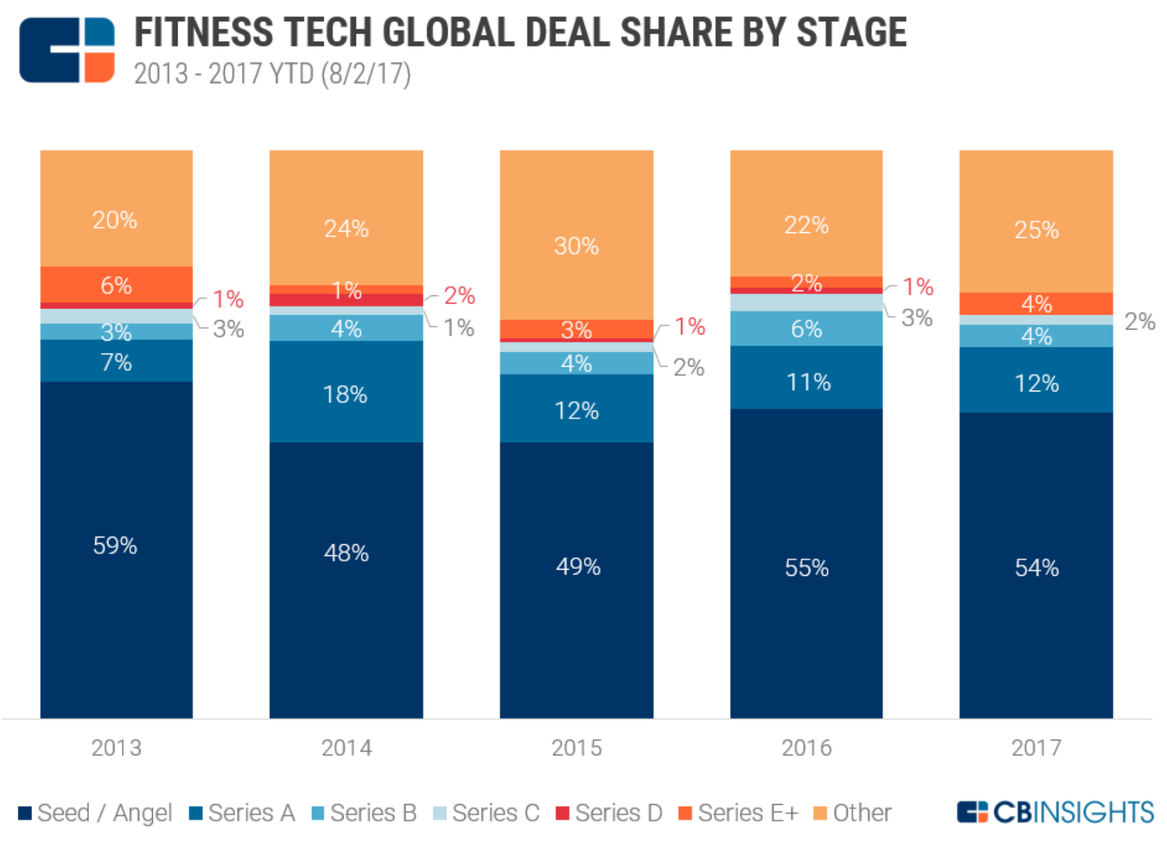
Venture Capital money coming into the segment set a new record in 2017





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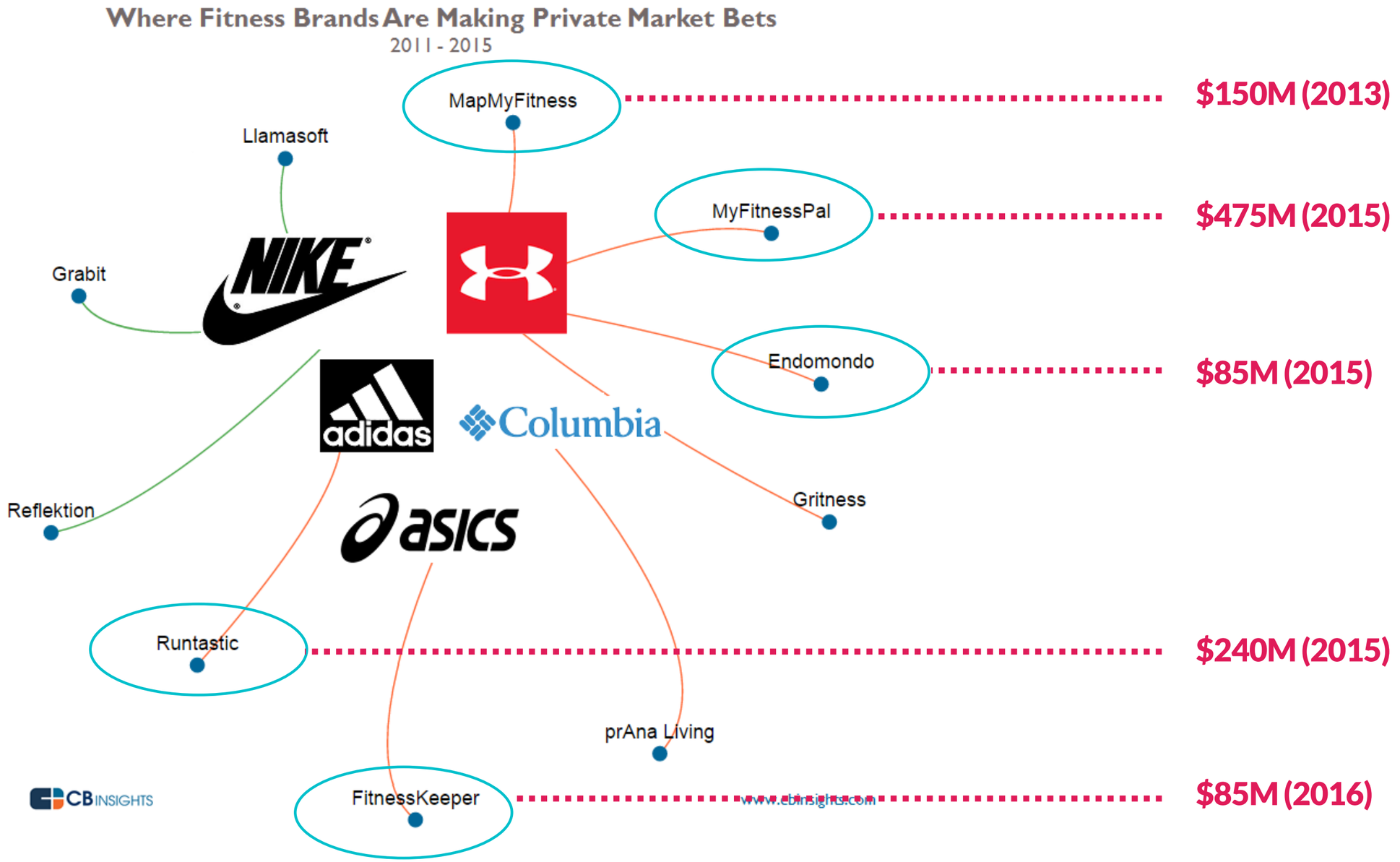
Massive successful exists in the running app segment



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