medisett

PITCH DECK - 2026

We're building the Airbnb of health tourism.

Patient routing infrastructure with a first check by AI or a partner doctor near home, built for Türkiye's health-tourism compliance framework.
Focused on hair transplant - dental treatment - IVF

PREPARED BY

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EXECUTIVE SUMMARY

Starting from Türkiye's health tourism: an AI-powered global digital health platform.

WHAT WE DO

A **digital health platform** that matches international patients with the right clinic — a first check by AI or a local partner doctor, a doctor-approved price, booking, escrow-protected payment (planned) and multilingual case management in a single flow.

WHO IT'S FOR

First verticals: **Hair transplant – Dental – IVF**.
Pilot markets (M0–12): **Azerbaijan + UK — hair transplant & dental**. Seed-round expansion: Germany - Gulf - Russia - Kazakhstan - USA.

WHY NOW?

Türkiye's health tourism is a mature, high-volume market (flat since the 2023 peak). Growth will now come from **share capture, conversion and service quality** rather than total volume.
AI first checks, partner doctors and automation make exactly that possible.

1.4M
Türkiye health tourists (2025, USHAŞ + TÜİK)

$3.02B
2025 Türkiye health tourism revenue

$273.7B
Global market projection for 2032 (10.1% CAGR)

Up to 50%
price advantage vs UK / DE / US on selected procedures

Sources: TÜİK / USHAŞ 2025 - Allied Market Research. Türkiye earned ~$3.02B from 1,398,580 health tourists (2025); global medical tourism projected at $273.7B by 2032, 10.1% CAGR.

— PROBLEM

What problem are we solving?

PROBLEM

How are decisions made today?

- **Information gap:** Clinic quality, doctor competence and real prices are difficult to compare consistently — and rarely visible in one place.
- **Price opacity:** The same procedure is offered at wildly different prices across channels.
- **Fragmented process:** Booking, interpreter, transfer, hotel and post-op follow-up are managed by different parties.
- **Payment terms vary by channel:** deposits of 5–50% plus balance at the clinic, usually by card or cash; no release tied to treatment completion.

SOLUTION

What does Medisett do?

- **Verified clinic network.** Only Ministry-authorized health-tourism providers, plus our internal verification system.
- **A first check for every patient.** By AI from photos, or by a partner doctor near home; then a price range, a €25 doctor call and a doctor-approved price (Slide 4).
- **End-to-end case management.** Consultation → quote → travel → treatment → 12–month follow-up; hotel, transfer and insurance through partners, after the doctor's pre-evaluation.
- **Escrow and installments (planned).** A licensed payment institution holds the payment until the service is completed; installments via licensed finance partners.

OPPORTUNITY

Why now, why Türkiye?

- **A leading destination:** Türkiye reached 1.4M health tourists and ~$3B health tourism revenue in 2025.
- **Price advantage:** Selected procedures like hair transplant, dental and IVF are far more accessible than in Western Europe and the US.
- **Demand is digital:** Patients discover clinics online when seeking treatment.
- **Fragmented local competition:** Existing platforms validate demand, but none are built on Türkiye's 2025 compliance framework with outcome tracking.
- **Trust gap:** Waiting lists, price pressure and trust issues are pushing patients toward transparent platforms.

— HOW PRICING WORKS

Every price starts with a first check.

By AI in the app when photos are enough and it is confident; otherwise by a partner doctor near home.

HAIR TRANSPLANT — Pilot

AI first check

PATIENT SENDS

Health history and guided photos: hairline, crown, sides, donor area

AI CHECKS

Photo quality and suitability; if it isn't confident, a local doctor takes over

DOCTOR GIVES

After the €25 call: a plan, a graft range and the final price

EXAMPLE

`2,800–3,400 grafts, estimated`

VENEERS AND CROWNS — Pilot

AI first check

PATIENT SENDS

4 guided smile photos: smile, close-up, upper and lower teeth

AI READS

Teeth that show when smiling, tooth color, gaps, chips and alignment

RESULT

An initial price range; the doctor approves the final price, confirmed at the exam

EXAMPLE

`8 upper front teeth → 8 veneers`

DENTAL IMPLANTS — Pilot

Local doctor check

PATIENT DOES

An exam and a 3D scan (CBCT) at a partner dentist near home; recent records can count

DENTIST CHECKS

Missing teeth, gums and the bone at each gap; AI measures, dentists decide

RESULT

A price range, then a fixed price for the plan the doctors approve

EXAMPLE

`3 gaps, enough bone → 3 implants`

IVF — Coming soon

Local doctor check

Eligibility first: married couples, own eggs and sperm. Tests on cycle day 2–3 at a partner lab near home.

Results go to the clinic; a price range, then a final price the doctor approves, plus a medication estimate.

Other treatments open once their first check is ready.

After every first check: a price range → a €25 video call with a doctor, deducted from the treatment price → the doctor approves the final price → booking. Confirmed in person; if the plan changes, a new quote first.

PROPRIETARY PRICING FORMULA

Sets every price; weights stay internal

$P_{max} = f(\text{clinical cost, logistics, risk buffers, margin, fees})$

$P_{paid} = \min(P_{max}, P_{realised})$ · patient pays the lower

$P_{max} \le (1 - \delta) \cdot P_{home}$ and $P_{max} \le (1 + \gamma) \cdot P_{median}$

AI prepares and checks the file; doctors decide. Examples are illustrative. Prices cover the procedure only; travel is booked separately through partners (Slide 9).

— THE OPPORTUNITY IN DETAIL

Market size and the first addressable market

Türkiye's official health tourism revenue data and the global medical tourism market projection.

THREE MARKET LAYERS

TAM - GLOBAL MARKET

Global medical tourism market

$97.3B → $273.7B

2022 actual → 2032 projected, 10.1% CAGR - market GMV

SAM - TÜRKİYE MARKET

Türkiye health tourism revenue

$3.02B

2025 - 1,398,580 patients - market GMV

BEACHHEAD - SERVICEABLE GMV

Hair - Dental - IVF ×
AZ/UK/DE/GCC/RU

$0.9–1.2B

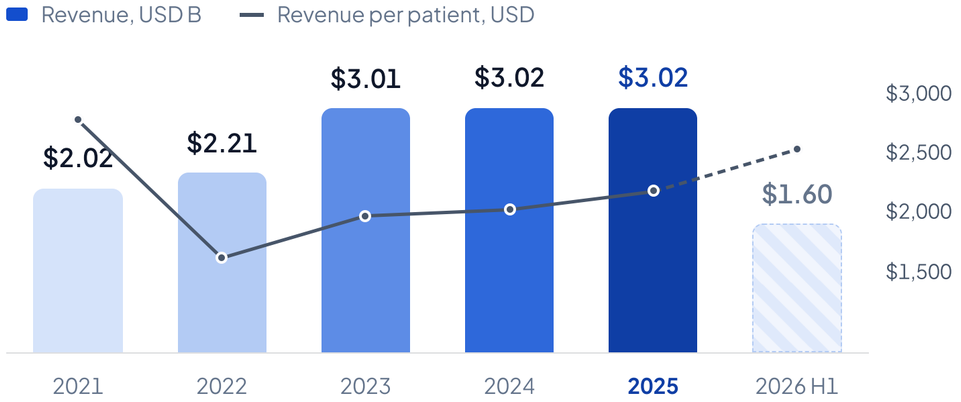
market GMV — multi-year ceiling

12-mo validation target (bottom-up): ~230 cases → ~€0.94M GMV → ~€140K commission (Slide 15)

Source: TÜİK / USHAŞ health tourism series (2021–2025), TÜİK Q1–Q2 2026 tourism statistics, HİB statement (July 2026). Global market: Allied Market Research, Medical Tourism Market 2023–2032 (published Nov 2023). Beachhead = multi-year ceiling, not a single-year target; 12-mo validation target modeled bottom-up on Slide 15.

TÜRKIYE HEALTH TOURISM: VOLUME FLAT, VALUE RISING

Patient volume is down 9.1% from the 2023 peak while revenue held flat — revenue per patient is up 39% (Q1 2026 vs Q1 2025). Growth now comes from value, not volume.



SOLUTION DETAILS & PRODUCT ARCHITECTURE

Five core features

01

Clinic Verification & Qualification Layer

USHAŞ license and accreditation checks, then scoring on procedure volume, outcomes and complication disclosure

Core

02

Case Management & Operations

Patient file, clinic panel, partner hotel/transfer/insurance after the doctor's pre-evaluation, flight tracking, 12–month follow-up.

Operational

03

First Check: AI or a Local Doctor

AI checks the photos when it can and is confident; otherwise a partner doctor near home examines. Then a price range, a €25 call and a doctor-approved price. **AI doesn't diagnose.**

AI

04

AI Scoring & Matching Engine

Ranks the best-fit doctors / clinics by treatment, location, price, language, accreditation and clinic performance.

AI

05

Patient Interface & Booking Flow

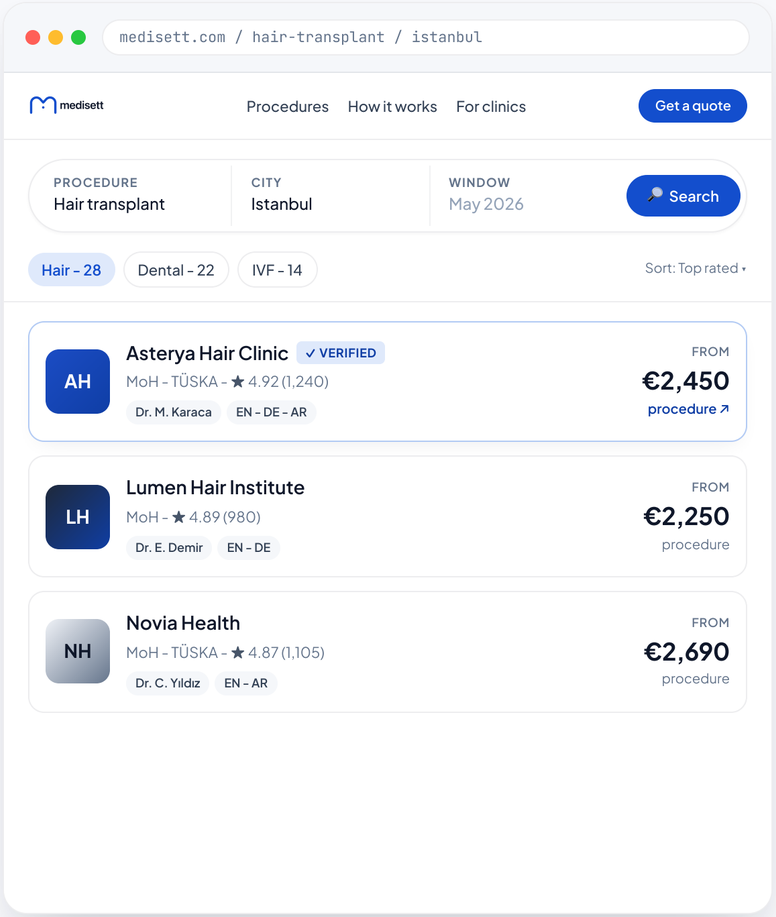
Multilingual search, results list, filtering, transparent pricing, clinic profiles and booking/quote flow.

TR - EN - DE - AR - RU

Live: hair transplant search

DEMO - CLINIC SEARCH & RESULTS PAGE

Illustrative demo data



VALUE CREATED

A confident decision for patients; lower acquisition cost and global reach for clinics.

FOR THE PATIENT

PROBLEM	TODAY	WITH MEDISETT
Decision time	4–8 weeks	**3–7 days**
Price uncertainty	20–40% price variance	**Price range + doctor-approved price**
Clinic verification	Patient's burden	**Ministry-authorized providers, filtered by accreditation criteria**
Post-op follow-up	Mostly missing	**12-month follow-up flow**
Payment terms	Deposit 5–50% + balance at the clinic; no release tied to treatment completion	**Escrow via a licensed payment institution + installments (both planned)**

FOR THE CLINIC

Up to 60%
Target savings in coordination time — hypothesis, to be validated in pilot

2–3× target
Potential lead-to-patient conversion uplift with a fast first check and a doctor call — hypothesis, to be validated in pilot

≤ €620
Measured patient-CAC target by M12 — Keyword Planner estimate today, see Slide 15

Reporting-ready
Data capture built for USHAŞ reporting — HealthTürkiye integration planned

PILOT HYPOTHESES — NOT ACHIEVED RESULTS

Clinic funnel: Listed → Verified → Contracted (40 by M12) → Active (≥1 case / 90 days; 28 by M12).

12-MONTH VALIDATION TARGETS

Projection, not actuals

KPI	MONTH 3	MONTH 6	MONTH 9	MONTH 12
Listed profiles (SEO / comparison inventory)	40	80	120	**150**
Contracted clinics	5 (LOI)	20	30	**40**
Active clinics (≥1 case in trailing 90 days)	0	12	20	**28**
Completed cases / month	0	~19	~26	**~32**
Measured CAC	—	≤ €800	≤ €700	**≤ €620**
Clinic response time - SLA (median)	—	<24 h	<18 h	**<12 h**

Patient marketing starts after USHAŞ authorization (~M3–4); M3 figures are pre-authorization - Figures rounded.

— CURRENT STATUS

Current Status

WHERE WE STAND TODAY

Product	Search & results flow live for hair transplant at medisett.com; dental & IVF in build
Clinic network	Informal clinic conversations; LOI process not yet started
Entity	Not yet incorporated — planned before first closing
USHAŞ authorization	Application not yet started; requires an incorporated entity first
Demand data	CAC modeled from Google Ads Keyword Planner (UK/DE); no live spend yet
Team	Mehmet (CEO, MD) + Tarık (CTO) — part-time, full-time at seed close; see Slides 17–18

NEXT 90 DAYS

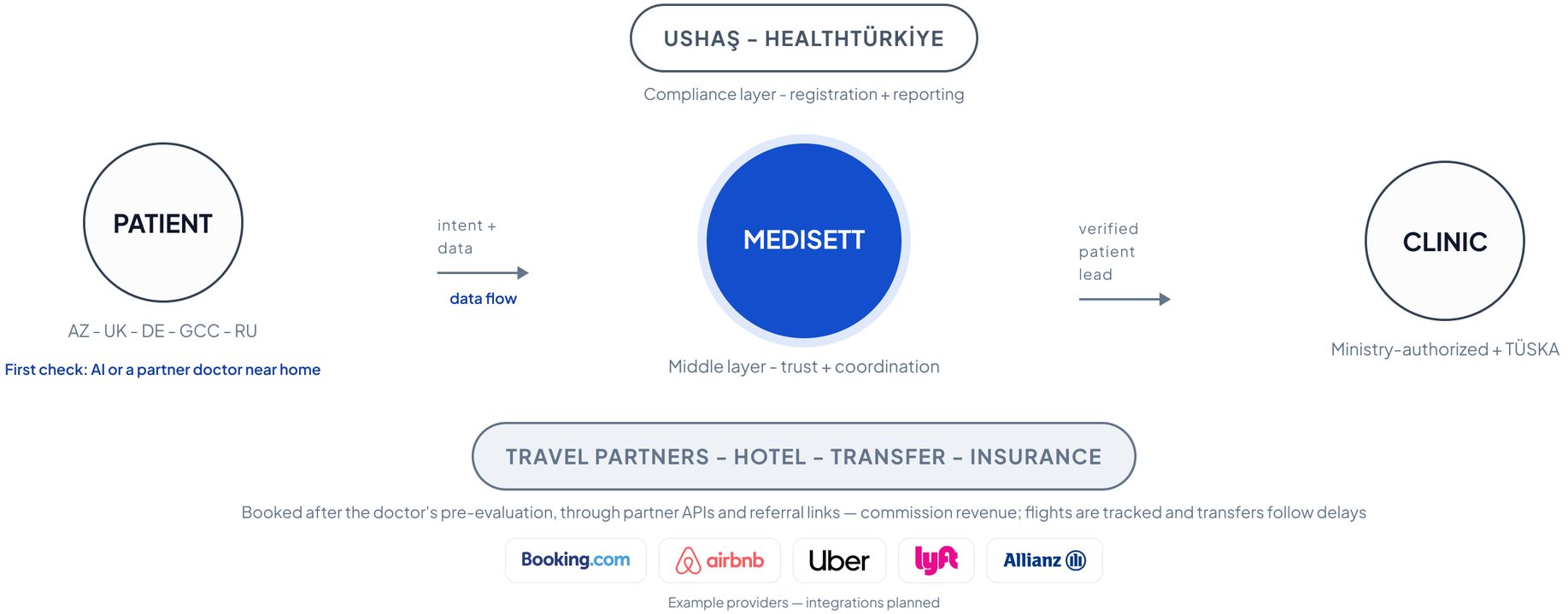
01	Incorporate the company (Medisett … A.Ş./Ltd.)	M1
02	Submit USHAŞ intermediary authorization application	M1
03	Sign first 5 clinic LOIs with written commission range	M2–3
04	30 patient interviews in Azerbaijan + UK diaspora communities (not advertising) - landing pages in EN/AZ/RU	M2–3
05	Legal opinion on international patient advertising under the 2025 regulation	M2
06	**After USHAŞ authorization:** live Google Ads test (€3K) — measured CPL and form→consultation rate replace the Keyword Planner estimate	~M3–4

Critical path: patient marketing starts only after USHAŞ authorization. If it slips: marketing budget shifts forward untouched; only ~€6K/month fixed cost is consumed while waiting (see Slide 15 stress table).

Regulation (RG 26 Apr 2025): facilities are authorized by the Health Ministry, intermediaries (like Medisett) by USHAŞ. The adaptation deadline (26 Oct 2025) and mandatory complication insurance (31 Dec 2025) have passed; TÜSKA accreditation / Ministry certification closes 31 Dec 2026; licenses lapse after 12 months of inactivity; intermediaries must run 24/7 multilingual patient support. - **Category rounds:** TMTC $4.5M (Q4'25) - CureMeAbroad $600K (Q2'26).

— STAKEHOLDER FLOWS

Five stakeholders, one orchestration layer



ESCROW A TCMB-licensed payment institution partner holds the payment and releases it to the clinic after the procedure (integration planned — agreement in progress) — Medisett does not hold customer funds. **Installments via licensed healthcare-finance partners — target structure: partner-funded, with no balance-sheet credit exposure for Medisett.**

REVENUE MODEL

Success-based clinic commission, 12–18% (target take rate — no contracts signed yet).

No platform fee for patients — the €25 doctor call is deducted from the treatment price.

COMMISSION BY PROCEDURE - PER CASE

PROCEDURE	CASE PRICE	COMMISSION %	COMMISSION €
Hair Transplant	€2,000 – €4,000	12 – 15%	€240 – €600
Dental Treatment	€3,000 – €8,000	14 – 17%	€420 – €1,360
IVF	€4,000 – €10,000	15 – 18%	€600 – €1,800
Average	**~€4,070**	**~14.8%**	**~€600 / case**

Assumed case mix: hair 60% - dental 30% - IVF 10% → weighted avg ~€4,070 - ~14.8%.

Sources: Bookimed 2025 price database; Smile Hair Clinic, Adalya Dental, Dentatur, ovu.com, my1health 2025. IVF packages excl. donation/surrogacy (not permitted in Türkiye).

AVERAGE REVENUE PER CASE

€600

per case, blended across three verticals → Gross margin target 65–72%

Gross margin = net revenue – direct case costs (payment fees, case management, medical review, support, refunds). See Slide 15.

SECONDARY REVENUE STREAMS

+6 mo	Hotel & transfer & insurance commissions via partner referrals - 5–15% in base case — ~€7K from Q3, Slide 15
+9 mo	Clinic subscription system
+9 mo	Patient financing / BNPL via licensed partners - installment plans for €2–10K procedures, referral commission per funded case
Seed	In-platform ads for promoting clinics

WHAT DO WE DO DIFFERENTLY?

Where we go narrower and deeper than existing platforms.

DIMENSION	STATUS QUO	MEDISETT
Clinic verification	Leading platforms verify licenses and international certificates (JCI/ISO/Temos) and audit hygiene; **none expose Turkish Ministry authorization + TÜSKA status as a patient-facing filter**.	**Ministry-authorization + TÜSKA filter**, physician-reviewed scoring, complication-rate disclosure
Price transparency	List prices match clinic price lists; **final package cost is confirmed case-by-case before invoice**	**A price range after the first check, then a doctor-approved price before booking** - with what's included and what happens if the plan changes
Payment	Deposit 5–50% (or a €200 platform deposit) + balance paid at the clinic by card/cash; **no release tied to treatment completion**; installments only in some markets	**Escrow via a licensed payment institution, released when the service is completed** + installments via licensed partners (both planned)
Pre-consultation	Coordinator-led; video consult with doctor on request	A first check by AI or a partner doctor near home + **a €25 doctor video call before every booking**
Assessment & categorization	Ratings and reviews; no outcome-based scoring	Objective clinic scoring with **outcome data**
Data security	Practices vary across the market	**Compliance-first, consent-based architecture** (KVKK + GDPR)
Post-op follow-up	Typically **1 month** of coordinator follow-up	**Structured follow-up through month 12** (interim review at month 6), with data capture
Regulator visibility	Not part of platform workflows	**HealthTürkiye-ready reporting**, automated

Status-quo column: platform-published terms (Bookimed "Your guarantees" and "Payment and deposit terms" pages, 2026); Medisett column describes planned capabilities.

— GO-TO-MARKET STRATEGY

How we reach ~230 measured cases and 40 contracted clinics in 12 months.

PATIENT SIDE - CHANNEL MIX Y1



Google Search - SEO + paid ads	35%
TikTok / Instagram Reels	20%
Diaspora communities + partner agencies (UK + AZ diaspora; 30 interviews pre-authorization)	15%
Patient referral loop (12-month post-op flow)	10%
Clinic co-marketing	8%
Doctor influencers	5%
State-backed channels (Heal in Türkiye / HİB fairs)	4%
Re-marketing across all channels	3%

Auction-channel share 58% — referral & diaspora channels carry near-zero CAC (target ≥ 25% of cases by M12) and fund the €800→€620 glide path. Marketing is a fixed budget: cases = budget ÷ CAC.

CAC - Q2 LAUNCH (KEYWORD PLANNER EST.)

~€800

CAC - M12 TARGET (MEASURED)

≤ €620

BREAKEVEN CAC AT 14.8% TAKE RATE

€450

MARKET PRIORITY - 12-MONTH VALIDATION

M0-12	**Azerbaijan** - Hair + Dental - AZ/RU - diaspora interviews from M1, ads after authorization	Pilot market
M0-12	**UK** - Hair + Dental - EN - live Google Ads test after authorization (~M3-4)	Pilot market
Seed	**Seed-round expansion** - Germany (Hair + Dental) - GCC (IVF) - Russia / Kazakhstan - USA — sequenced on measured pilot CAC	Post-validation

CLINIC ACQUISITION — FOUNDER-LED (MD) DIRECT SALES

Listed profile → **Verified** (MoH / TÜSKA docs) → **Contracted** (SLA + commission) → **Active** (≥1 case / 90 days)

Target: 150 listed - 40 contracted - 28 active by M12 — same definitions used on Slides 7, 15, 20.

No patient-facing promotion before USHAŞ authorization (2023 promotion regulation, Art. 8). Authorization expected ~M3-4 post-close — Q1 spend is clinic-side & brand only (Slide 15). Int'l advertising per Nov 2025 rules: authorized entity, non-TR language, offshore targeting† († under legal review — opinion due M2, Slide 8).

COMPETITIVE MAP

Existing platforms validate demand. None are built on Türkiye's 2025 compliance framework with outcome tracking.

POSITIONING



Positioning = self-assessment vs. published capabilities.

WHY THIS IS HARD TO COPY — 3 STRUCTURAL MOATS

01 **Regulatory barrier**

Compliance-native from day one: USHAŞ authorization, TÜSKA filter, HealthTürkiye reporting. Legacy intermediaries must retrofit or lose licenses after 26 Oct 2025.

02 **Founder-built clinic network**

Physician-to-physician vetting, on the ground in Türkiye.

"We are a physician and an engineer building this from inside Türkiye. The clinic network is built founder-to-clinician, in Turkish, on the ground — not sourced remotely through sales reps. Physician-level clinic vetting and local regulatory operations are not something a foreign listing platform can bolt on."

03 **Outcome data**

Structured post-op data through the first year (months 1, 3, 6, 12) that listing sites don't collect.

REGULATION

A marketplace, not a clinic: doctors decide, and the clinic confirms the price.

In legal terms, Medisett is a health-tourism intermediary: we don't perform surgery, prescribe or sell medicines. We collect information, organize the trip and follow up.

WHO DOES WHAT

01 First check — MEDISETT + PARTNER DOCTOR

AI or a partner doctor near home collects the information and shows an estimated price range.

→

02 Doctor call — THE CLINIC'S DOCTOR

Reviews the case, sets the treatment plan and gives a clinic-confirmed, itemized quote.

→

03 Treatment — LICENSED CLINIC

Done at a Health Ministry–licensed clinic. If the exam changes the plan, a new quote comes first.

THE RULES WE WORK UNDER

01

USHAŞ license

Under the April 2025 regulation, Turkish clinics may work only with intermediaries licensed by USHAŞ. We apply in month 1; patient ads start only after the license (~month 3–4).

02

Patient data

Under KVKK and GDPR, health data is used only with the patient's explicit consent and shared only with the doctors and clinic they choose.

03

Ads and price wording

Google verifies our company documents, but that doesn't replace the license. We don't sell or arrange medicines, so LegitScript doesn't apply. Ads say "estimated price range", then "clinic-confirmed quote"; we never promise a price that can't change.

04

AI and medical devices

AI prepares the file and never diagnoses. Features that read scans, such as dental X-rays, get a medical-device software review (UK MHRA) before launch.

Our own assessment, not legal advice; a legal opinion is planned for month 2 (Slide 8). Sources: Health Tourism Regulation (RG 26.04.2025); USHAŞ intermediary documents; Google Ads policies (prescription drugs, advertiser verification); UK CAP Code, section 3; MHRA guidance on medical-device software.

— FINANCIALS - MARKETING-DRIVEN VALIDATION MODEL

€250K funds a 12-month validation round — peak cumulative burn €137K, ending cash ~€113K.

Assumptions: avg case value €4,070 - blended take rate 14.8% (€600/case) - COGS €190/case - ancillary €40/case from Q3 - CAC (Keyword Planner est.) €800 Q2 → €700 Q3 → €620 Q4 - USHAŞ authorization end of Q1, patient marketing from Q2. **Marketing is a fixed budget, so cases = budget ÷ CAC; cash burn is capped by the budget, not by CAC.**

LINE ITEM - €	Q1	Q2	Q3	Q4	12 MO
Completed cases	0	56	79	97	**232**
GMV - €4,070/case	0	228K	322K	395K	**944K**
Net commission - 14.8%	0	33.7K	47.6K	58.4K	**139.7K**
Ancillary - hotel / transfer	—	—	3.2K	3.9K	7.0K
Direct case costs - €190/case	0	−10.6K	−15.0K	−18.4K	−44.1K
Gross profit	**0**	**23.1K**	**35.7K**	**43.9K**	**102.7K**
Marketing & patient acquisition - Q1: clinic-side & brand only	10K	45K	55K	60K	**170K**
Fixed OPEX - no founder salary	20K	16.6K	16.6K	16.6K	**~70K**
Net cash flow	**−30.0K**	**−38.5K**	**−35.9K**	**−32.7K**	**−137K**
Cumulative - peak funding need	−30.0K	−68.5K	−104.4K	**−137.1K**	**covered - €113K spare**

STRESS SCENARIOS — ENDING CASH

SCENARIO	CASES	GROSS PROFIT	ENDING CASH
Base	232	€103K	**€113K**
CAC +25% (€1,000 → €775)	185	€82K	**€92K**
USHAŞ authorization slips one quarter (marketing shifts, +€17K fixed)	224 in 15 mo	€99K	**€93K**
CAC +25% **and** one-quarter slip	~180 in 15 mo	~€79K	**~€72K**

Because marketing is a fixed budget, a worse CAC means fewer data points — not insolvency. **Spend is increased only when measured CAC ≤ €700 for two consecutive months.**

*Fixed OPEX €70K / 12 mo: incorporation, legal, USHAŞ application, KVKK/GDPR & contracts €25K (Q1-weighted) - tech & AI infrastructure €12K - case-ops & 24/7 multilingual patient support (two part-time bilingual coordinators from Q2, AI triage) €24K - accounting, insurance, admin €9K - **founder salaries €0**. COGS ~€190/case — payment fees ~2.5% of GMV, case management, medical review, refund reserve. Q1 marketing = clinic-side & brand/landing preparation only (no patient ads before authorization). **State support:** once licensed, 60%+ of marketing spend is reimbursable (annual caps), so most of the €170K line can come back — not counted here (Slide 16). Figures rounded; totals may not sum.*

— UNIT ECONOMICS & PATH TO PROFITABILITY

Contribution per case depends on two numbers we do not yet have. This round exists to measure which cell we are in.

UNIT ECONOMICS / CASE Launch (Q2) → Mature	Commission	Ancillary	COGS	CAC (Keyword Planner est.)	Contribution
	€600	~€40	−€190	−€800 → −€440	**−€350 → ~+€10**

SENSITIVITY — CONTRIBUTION PER CASE

contribution = commission + €40 ancillary − €190 COGS − CAC - commission = €4,070 × take rate

TAKE RATE	CAC €300	CAC €440	CAC €600	CAC €800
12% (€488)	**+€38**	−€102	−€262	−€462
14.8% (€600) - today's blend	**+€150**	**+€10**	−€150	−€350
18% (€733)	**+€283**	**+€143**	−€17	−€217

Breakeven CAC is **€450** at today's blended take rate and **€583** at 18%.

THREE LEVERS MOVE US UP-RIGHT

01 **Contracted take rate.** Hair-transplant contracts are being negotiated at the upper band (15–18%).

02 **Organic and referral share**, which carry near-zero CAC — target ≥ 25% of cases by M12.

03 **State support for marketing.** Once licensed, 60% of advertising, promotion and marketing spend is reimbursed (70% in target countries; +10 pts for Heal in Türkiye portal members since 1 June 2025). At 60%, an €800 CAC nets to €320 — contribution −€350 → +€130. Paid back after spending, with annual caps; not in our base case.

FIXED-COST COVERAGE

Fixed costs of ~€70K/yr are covered at **~470 cases/yr at €150 contribution** — the seed-round target.

Measured CAC and contracted take rate are published to investors at M6 and M12 (Slides 7, 20). Spend increases only when measured CAC ≤ €700 for two consecutive months (Slide 15).

— THE ASK

€250K

Pre-seed - validation round - 12 months to measured unit economics.

Discount SAFE (adapted to Turkish law): converts into shares at the next priced round, 20% below that round's share price; no valuation cap - 12-month validation runway - target close Q1 2027.

ROUND STRUCTURE

Discount to the next round's price	20%
MFN clause	Yes
Min. investment	€25K angel - €50K institutional
Entity	Not yet incorporated — incorporation is a condition precedent to first closing

WHY THIS STRUCTURE?

Pricing is deferred to the seed round; the discount and MFN protect early investors' upside. Marketing is a fixed budget — a worse CAC yields fewer data points, not a cash shortfall.

SOURCES & USES — 12 MONTHS

SOURCES	
Pre-seed raise	€250K
Gross profit generated (Slide 15)	~€103K
Total sources	**~€353K**

USES	
Marketing & patient acquisition – fixed budget	€170K
Fixed OPEX Legal, incorporation, USHAŞ, KVKK/GDPR €25K - tech & AI €12K - case-ops & 24/7 support €24K - accounting, insurance, admin €9K - founder salaries €0	€70K
Total uses	**€240K**

Ending cash **~€113K**

€353K – €240K = €113K - peak cumulative burn €137K (Q4) is covered - runway extension through the seed raise (M12–M15)

ZERO FOUNDER SALARY. 100% OF THE ROUND GOES TO VALIDATION.

Founders draw **no salary and accrue no deferred compensation** during the 12-month validation period. Compensation is equity only.

Living costs are covered by the founders' existing professional income (practicing physician; agency founder) — the company carries no founder payroll liability.

Commitment: Mehmet — part-time; clinic network, medical review, patient operations. Tarık — part-time; product, AI, acquisition. **Both move to full-time at seed close**, funded by the seed round, at market-rate salaries set with the seed lead.

— TEAM

Founding Team



Mehmet Beyli, MD

CEO & CO-FOUNDER

MD, Marmara University School of Medicine - Erasmus, Aristotle University of Thessaloniki - Harvard Medical School – McLean Hospital observership (2019) - Medical Manager, Abdiibraim (2018–2021) - Bayburt State Hospital (2024–2025) - Family Medicine, Alanya (2026–). **Leads clinic network, medical review and patient operations.**



Tarık Taşçı

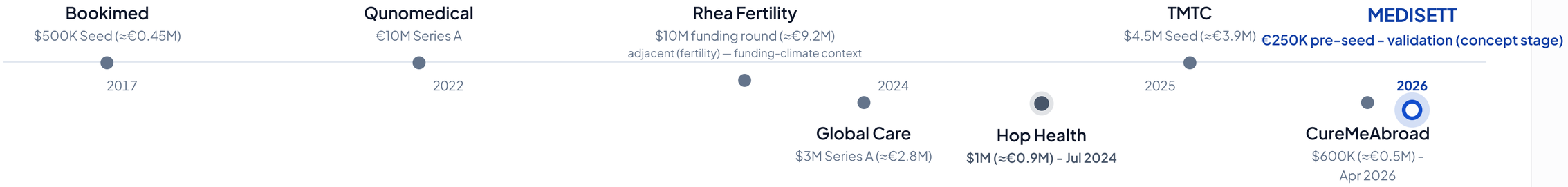
CTO & CO-FOUNDER

Founder, Pixir (2022–) - R&D Specialist, Ensoft (2025–2026): AI-based solar generation forecasting - Software Developer, Naturel Enerji (2024–2025) - TAV Airports IT (2019) - BSc Computer Science (AI & ML), University of London — in progress - E-Commerce & Marketing, OSTİM Technical University (2020–2022) - Harvard CS50x. **Leads platform, AI infrastructure and digital acquisition.**

Commitment: both founders part-time during the 12–month validation period, drawing no salary; full-time at seed close (Slide 17).

— COMPARABLE ROUNDS

Comparable rounds in the category



Five rounds since 2024; excluding adjacent Rhea Fertility ($10M), all ≤ $4.5M — the category is funded at seed scale, not yet at growth scale.

All figures compiled from public sources: Crunchbase - Tracxn - TechCrunch - company press releases. FX as of round date (approx.).

— BUDGETING & MILESTONES

Sources & uses — and 12-month milestones

SOURCES & USES — 12 MONTHS

SOURCES

Pre-seed raise	€250K
Gross profit generated (Slide 15)	~€103K
Total sources	**~€353K**

USES

Marketing & patient acquisition - fixed budget	€170K
Fixed OPEX Legal, incorporation, USHAŞ, KVKK/GDPR €25K - tech & AI €12K - case-ops & 24/7 support €24K - accounting, insurance, admin €9K - founder salaries €0	€70K
Total uses	**€240K**
Ending cash €353K – €240K = €113K - peak cumulative burn €137K (Q4) is covered - runway extension through the seed raise (M12–M15)	**~€113K**

12-MONTH MILESTONES

M0–3	Incorporation - USHAŞ application - first 5 clinic LOIs - 30 patient interviews in Azerbaijan + UK (diaspora communities, not advertising) - landing pages in EN/AZ/RU
~M3–4	**USHAŞ intermediary authorization** → live Google Ads test (€3K) → measured CPL and form→consultation rate replace the Keyword Planner estimate
M6	~55 completed cases - 20 contracted clinics - measured CAC published to investors
M9	~135 cumulative cases - 30 contracted clinics - first ancillary revenue
M12	**~230 completed cases – 40 contracted clinics – 150 listed profiles – measured CAC & take rate – 30/90-day outcome data on ≥100 cases → seed round (€1–1.5M) on evidence**

Marketing is a fixed budget: cases = budget ÷ CAC, so cash burn is capped by the budget, not by CAC (Slide 15). Spend is increased only when measured CAC ≤ €700 for two consecutive months. Founder salaries €0 for the validation period (Slide 17).

CLOSING

Thank You

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DEMO

Product preview

medisett.com

This presentation is for information purposes only; it is not a public offer or an investment solicitation. All numerical projections are estimates. Sources: USHAŞ + TÜİK 2025 - Allied Market Research 2023 - Crunchbase / Tracxn 2025–26.