

Pulse MagicLens™

Venture Memo

Structured Intelligence Infrastructure for Enterprise Documents — Investment Overview

"The bottleneck is no longer intelligence. It's structure."

COMPANY	PRODUCT	STAGE	DATE
PulseDNA Inc.	Pulse MagicLens™ (PulseML)	Private Beta	February 26, 2026

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Core Thesis: Enterprises don't need better AI agents. They need a structured intelligence layer that turns complex, unstructured documents into execution-ready systems — instantly, privately, and at scale.

01 ·

THE PROBLEM

Enterprise Execution Runs on Unstructured Documents

The documents that drive enterprise decisions — government RFPs, AI infrastructure deployment scopes, compliance packets, enterprise contracts, and regulatory filings — are fundamentally unstructured. They are dense, inconsistent, and designed for human reading, not machine execution.

- Manual structuring by analysts and legal teams — slow, expensive, error-prone
- Spreadsheet chaos as data is extracted inconsistently across teams
- Compliance risk from missed clauses and misaligned tagging
- Proposal errors that cost contracts and damage relationships
- Slow submission cycles that forfeit competitive advantage

AI assistants have not solved this. They summarize. They do not operationalize. The gap between raw document intelligence and execution-ready output remains the single largest bottleneck in regulated enterprise workflows today.

02 ·

THE INSIGHT

Enterprises Don't Need AI Agents. They Need Structure.

"Upload once → structured intelligence → execution-ready systems. Structured extraction + schema mapping + execution scaffolding = operational leverage."

The insight driving PulseDNA is not that AI needs to be smarter. It is that the output of AI needs to be structured. Structured extraction combined with schema mapping and execution scaffolding creates a compounding operational advantage that conversational AI cannot replicate. Every document becomes a system. Every system becomes a competitive asset.

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THE PRODUCT

Pulse MagicLens™ (PulseML)

PulseML is a browser-based structured intelligence engine. Upload any document and instantly receive a complete execution layer — entity extraction and relationship mapping, inconsistency flags and risk detection, and a full data dictionary with structured metadata export. PulseML does not summarize. It operationalizes. The output is not a report — it is a structured system ready for downstream execution, compliance review, and team action.

PulseML is built for the documents that matter most: government RFPs, AI deployment scopes, compliance filings, enterprise contracts, and regulatory submissions. It is the first product in a broader infrastructure platform targeting regulated verticals where document complexity is highest and the cost of errors is greatest. The browser-native delivery model means zero IT friction — any team can be productive within minutes of onboarding, with no infrastructure setup required on the customer side.

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WHY NOW

Five Converging Forces

The market window for structured intelligence infrastructure is open now — and closing fast. Five forces have converged to create an urgent, defensible opportunity for PulseDNA:

- Explosion of AI infrastructure rollouts requiring formal documentation and compliance review
- Government AI procurement acceleration, with new RFP volumes at record highs
- Compliance complexity increasing under the EU AI Act, HIPAA updates, and sector mandates
- Enterprises drowning in documentation with no scalable path to structured execution
- LLM maturity now enabling deterministic, schema-constrained structuring at production quality

The timing is precise: LLMs are now reliable enough to produce deterministic structured outputs, but the tooling layer that turns those outputs into enterprise-grade execution systems does not yet exist at scale. PulseDNA is building that layer — and the window to establish infrastructure-level dominance in regulated verticals is measured in months, not years.

"The bottleneck is no longer intelligence. It's structure."

\$21M–\$46M

Serviceable Obtainable Market
Nuclear & Critical Infrastructure

\$66M

Seed Valuation
Justified by SOM alone

\$500K–\$2M+

Annual Contract Value
Government / Defense vertical

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DIFFERENTIATION

Infrastructure Over Interface

PulseDNA proves infrastructure advantage via a micro-software wedge. The differentiation is architectural, not cosmetic. While general agentic AI tools compete on personality and workflow design, PulseDNA competes on determinism, privacy, and execution depth — properties that regulated enterprise buyers require and that conversational AI cannot provide.

General Agentic AI	Pulse MagicLens™
Workflow-heavy, manual	Extraction-first, automated
Personality-driven outputs	Deterministic structured outputs
Chat-based interaction	Schema-based extraction
Interface-centric	Infrastructure-centric
Cloud-dependent	Privacy-aware, edge-capable
Summarizes documents	Operationalizes documents
Generic across verticals	Domain-tuned for regulated sectors

The infrastructure positioning creates durable moats: once PulseML is embedded in a legal team's RFP workflow or a government contractor's compliance pipeline, the switching cost is structural, not merely habitual. Every document processed trains the schema. Every schema deployed deepens the integration. The result is a compounding advantage that grows with every customer engagement — a property that interface-layer competitors cannot replicate.

PulseDNA's two-product architecture reinforces this moat: Magic Lens (\$50K–\$200K) serves as the entry wedge, while PulseFINE™ (\$5M–\$15M) delivers the full AI infrastructure play for nuclear facilities and critical infrastructure operators. Customers who start with Magic Lens are on a natural upgrade path to PulseFINE™ — creating a land-and-expand motion with exceptional lifetime value per account.

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BUSINESS MODEL

Three-Phase Revenue Architecture

PulseDNA's revenue model is designed to scale with enterprise sovereignty requirements — from innovation pod pilots to full dedicated colocation deployments with human-in-the-loop expert verification. Each phase builds on the last, creating compounding switching costs and expanding margin as the platform deepens its integration into regulated enterprise workflows.

Phase	Revenue Stream	Strategic Purpose
Initial \$50K–\$100K	SaaS (per-seat + usage tier); enterprise pilot contracts. Consumer Magic Lens freemium → \$29–\$199/mo per user.	Prove product-market fit in regulated verticals. Establish first reference customers in Nuclear, Government, and FinTech.
Growth \$250K–\$500K/yr	Regulated Vertical Deployment — per-seat enterprise license for Magic Lens Co-Processor; dedicated sovereign colocation infrastructure fee (per center).	Land and expand within key verticals. Hardware colocation creates high switching costs and durable recurring revenue moats.
Scale \$1M+/yr	Enterprise Sovereign Scale — Expert SME Verification Network (variable/retainer); Unstructured Data & Sentiment Analysis (variable/usage); compliance module add-ons (NRC, HIPAA, FedRAMP, SOC2).	Become the dominant structured intelligence layer for regulated industries. Expert network usage scales naturally with enterprise adoption — land-and-expand motion.

Pricing Tier Progression

TIER 1 Innovation Pod Pilot \$50K – \$100K Entry-level pilot for regulated enterprise teams. Per-seat SaaS + usage tier. Ideal for legal ops, RFP teams, and government contractors.	TIER 2 Regulated Vertical Deployment \$250K – \$500K/yr Full enterprise license with dedicated sovereign colocation. Includes compliance modules and co-sell data integrations (John Snow Labs).	TIER 3 Enterprise Sovereign Scale \$1M+ /yr Human-in-the-loop SME verification network. FedRAMP sovereign deployment. Full unstructured data + sentiment analysis stack.
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Revenue Model Breakdown

Revenue Component	Description
Infrastructure Fee	Base charge for dedicated sovereign colocation (per center). Creates high switching costs and durable recurring revenue moats through hardware lock-in.
Software License	Per-seat or enterprise license for Magic Lens Co-Processor. Scales with team size and document volume across the organization.
Expert Verification	Tiered usage billing for Human-in-the-Loop SME routing. Expert network usage scales naturally with enterprise adoption and audit cycles.
Data Integrations	Co-sell modules — John Snow Labs clinical sentiment analysis for handwritten notes; Google, Supermicro, and NVIDIA partnership integrations.
Compliance Modules	Add-on regulatory packages (NRC, HIPAA, FedRAMP, SOC2). High-margin recurring add-ons tied to annual audit and certification cycles.

Vertical Pricing Anchors

Vertical	Annual Contract Value	Deployment Profile
Nuclear (DOE/NRC)	\$500K – \$1M+/yr	Dedicated colocation + physics AI specialist + NRC compliance modules
Clinical / Healthcare	\$250K – \$750K/yr	HIPAA-compliant unstructured data pipeline + clinical sentiment analysis (John Snow Labs co-sell)
FinTech (PulseATLAS)	\$250K – \$500K/yr	Risk intelligence layer + verified knowledge graph for regulatory filings
Government / Defense	\$500K – \$2M+/yr	FedRAMP sovereign deployment + expert routing + Zero Trust architecture
Consumer (Magic Lens)	\$29 – \$199/mo per user	SaaS freemium → paid conversion. Browser extension for compliance co-pilot use cases.

Why This Pricing Model Wins

- › Aligns with strict data sovereignty & compliance requirements of regulated enterprise buyers
- › Hardware colocation creates high switching costs and durable recurring revenue moats
- › Expert network usage scales naturally with enterprise adoption — land-and-expand motion
- › Co-sell partnerships (John Snow Labs, Google, Supermicro, NVIDIA) accelerate pipeline without direct sales cost
- › SOM of \$21M–\$46M (Nuclear & Critical Infrastructure) alone justifies the \$66M seed valuation

07 · GO-TO-MARKET

Precision Entry, Rapid Expansion

PulseDNA enters through high-value, document-intensive workflows where the cost of errors is highest and the willingness to pay for structured intelligence is greatest. The initial motion is direct enterprise sales to legal operations teams, proposal and RFP teams, government contractors, and AI infrastructure groups — all of whom share a single, urgent pain point.

INITIAL USERS	HOOK
→ Legal operations teams	<i>"Turn your 200-page RFP into structured execution in 30 seconds."</i>
→ Proposal and RFP teams	
→ Government contractors	
→ AI infrastructure groups	

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WHY THIS WINS

Enterprise Buyers Have Three Non-Negotiables

Enterprise procurement — particularly in regulated sectors — is driven by three requirements that general AI tools cannot meet: fewer compliance errors, faster submission cycles, and reduced operational risk. Pulse MagicLens™ addresses all three at the infrastructure level.

- **Fewer compliance errors** — deterministic extraction eliminates the inconsistency of manual review
- **Faster submission cycles** — 200-page documents structured in seconds, not days
- **Reduced operational risk** — risk flags and inconsistency detection built into every output
- **Execution clarity** — auto-generated OKR, WBS, and milestone scaffolding turns documents into action plans

PulseML turns documents into execution systems. Document → Execution Layer.

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INVESTMENT THESIS

Why PulseDNA Wins at the Infrastructure Layer

PulseDNA is not building another AI interface. It is building the structured intelligence infrastructure layer that all regulated enterprise AI workflows will eventually require. The company's timing, architecture, and go-to-market motion are aligned with a once-in-a-decade convergence: the moment when LLMs become reliable enough for deterministic enterprise use, but before any infrastructure-layer player has achieved category dominance.

The investment thesis is straightforward. PulseDNA enters through high-value document workflows, proves ROI in weeks, and expands via hardware colocation and compliance module lock-in. The land-and-expand motion is capital-efficient, the switching costs are structural, and the vertical pricing anchors (\$250K–\$2M+ ACV) deliver exceptional unit economics from the first enterprise contract. The \$66M seed valuation is conservative relative to the \$21M–\$46M SOM in Nuclear and Critical Infrastructure alone — before accounting for Clinical, FinTech, and Government/Defense verticals.

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MILESTONES & USE OF FUNDS

Seed Round Deployment Plan

Milestone	Target
Close first 3 enterprise pilot contracts (Tier 1)	Q2 2026
Deploy first sovereign colocation instance (Nuclear vertical)	Q3 2026
FedRAMP authorization process initiated	Q3 2026
First Tier 2 contract signed (\$250K–\$500K ACV)	Q4 2026
John Snow Labs co-sell agreement executed	Q4 2026
Series A readiness: \$1M+ ARR, 3 verticals live	Q1 2027

Use of Funds	Allocation
Product engineering (structured extraction engine, compliance modules)	40%
Enterprise sales & partnerships (direct + co-sell motion)	30%
Infrastructure & sovereign colocation buildout	20%
Legal, compliance, and FedRAMP certification	10%

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KEY RISK FACTORS

Risks the Team Has Identified and Is Actively Mitigating

PulseDNA operates with full awareness of the risks inherent in building infrastructure software for regulated industries. The following risks have been identified and are being actively addressed through product design, partnerships, and go-to-market sequencing.

Risk Factor	Mitigation Strategy
Regulatory complexity — FedRAMP, NRC, HIPAA certification timelines can extend 12–18 months	Initiating FedRAMP authorization in parallel with first enterprise pilots; partnering with certified infrastructure providers to accelerate timelines
Enterprise sales cycles — regulated verticals have long procurement processes (6–18 months)	Tier 1 pilot structure (\$50K–\$100K) is designed to bypass procurement committees; direct to team-level buyers in legal ops and proposal functions
LLM reliability — structured extraction quality depends on model consistency and hallucination rates	Schema-constrained extraction with human-in-the-loop SME verification layer; deterministic output validation built into every pipeline
Competitive response — large platforms (Microsoft, Google) may build similar features into existing enterprise suites	Infrastructure positioning creates switching costs that interface-layer features cannot replicate; vertical-specific compliance modules are not addressable by horizontal platforms
Talent concentration — early-stage dependency on founding team expertise	Structured knowledge base and schema library reduce key-person risk; hiring plan prioritizes domain specialists in Nuclear and Government verticals

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NEXT STEPS FOR INVESTORS

Engagement Path

PulseDNA is accepting a limited number of venture and angel preview engagements. The following engagement path is available to qualified investors:

Step	Description
1. Initial Conversation	30-minute introductory call with Founder Stephanie Joyce to discuss the investment thesis, product roadmap, and current traction. Schedule via email at stephanie@thepulsedna.com .
2. Technical Brief	Full technical brief available upon NDA execution. Includes architecture documentation, schema library overview, and detailed vertical deployment specifications.
3. Product Demo	Live PulseML demonstration using a real enterprise document (RFP, compliance filing, or AI deployment scope). Demonstrates the full extraction-to-execution workflow in under 30 seconds.
4. Due Diligence Package	Full due diligence package including financial model, cap table, customer pipeline, partnership agreements, and legal documentation available to serious investors.
5. Term Sheet	Seed round terms available for discussion. PulseDNA is targeting a \$66M pre-money valuation with a structured investment timeline aligned to Q2 2026 pilot contract milestones.

Contact & Next Steps

To schedule an introductory call or request the full technical brief, contact Founder Stephanie Joyce directly:

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PulseDNA Inc. is headquartered in Arizona and is currently in Private Beta. The company is seeking seed investment to accelerate enterprise pilot deployment, initiate FedRAMP certification, and execute its land-and-expand go-to-market motion across regulated verticals. PulseDNA is positioned to become the dominant structured intelligence layer for regulated enterprise AI — the infrastructure that every regulated organization will require as AI adoption accelerates.

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