TG»POD

A global network of smart pods for private work and play

In malls, airports, coffee shops and anywhere noisy with heavy footfall

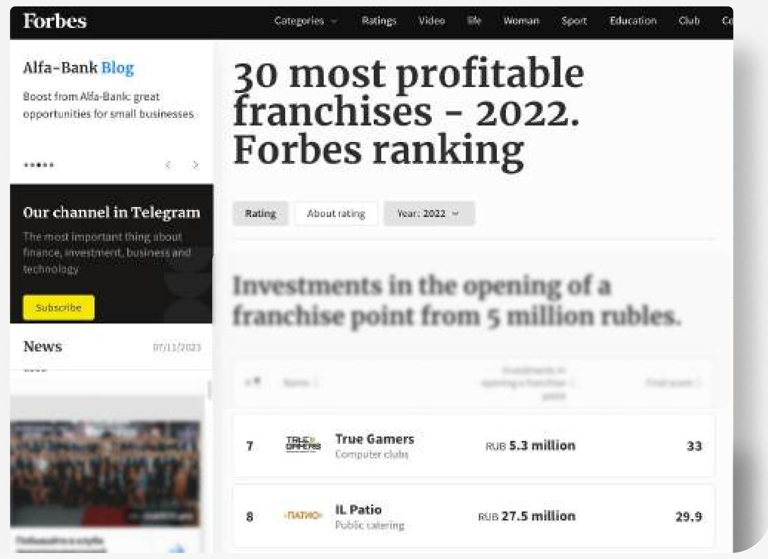
- Patented cabin design
- In-house electronics
- Own software platform, IZI

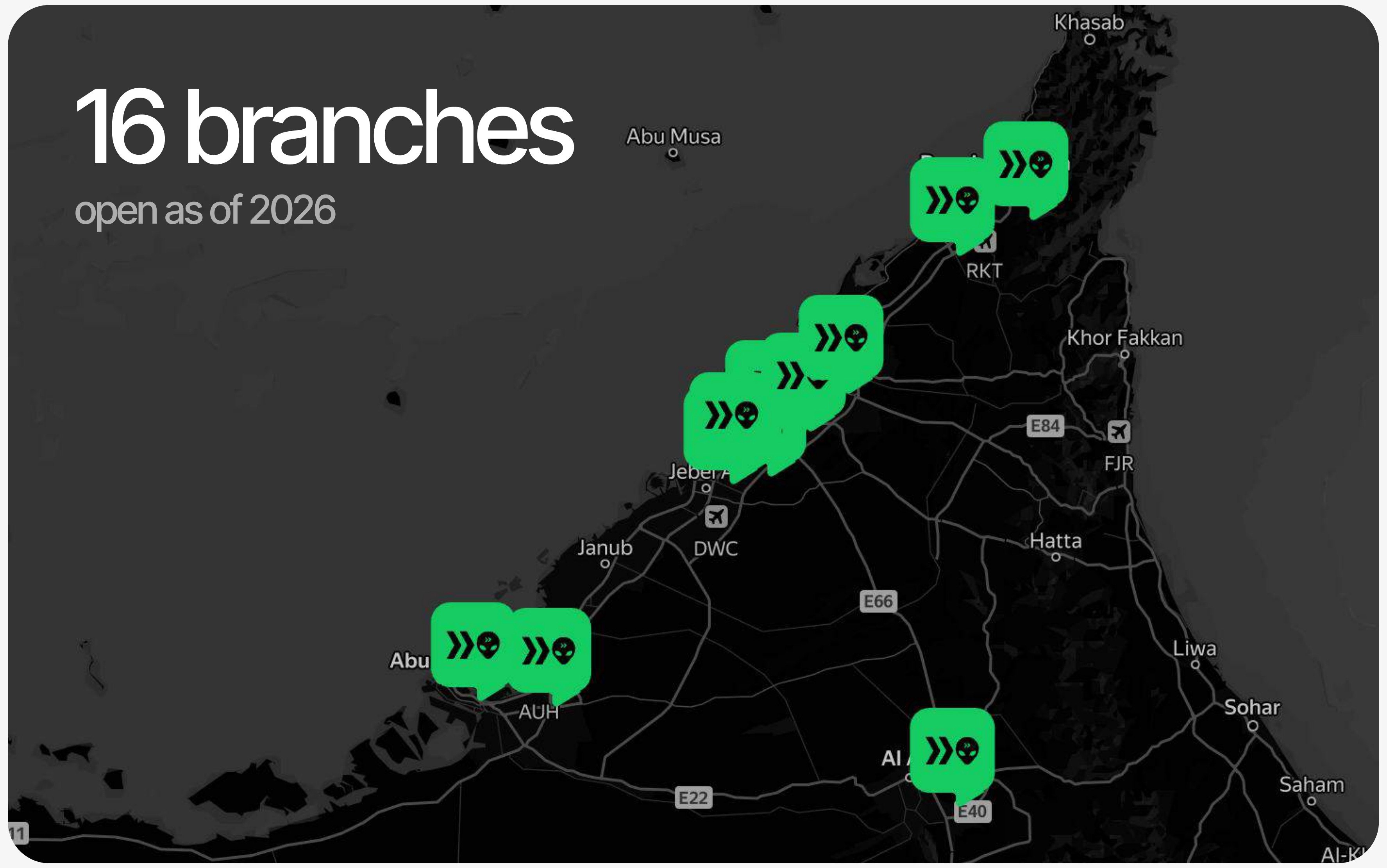
TG»POD

» A top-3 esports club network worldwide and number one in MENA

160 clubs, eight countries, proprietary software and a franchise engine that already works.

Forbes Top 7 most profitable franchises in the CIS



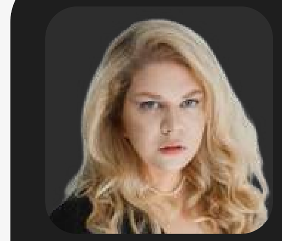


01 **160+** clubs in the True Gamers network	02 **21** clubs open in MENA	03 **60%** of guests return
04 **120k** guests per month	05 **8** countries of presence	06 **800+** tournaments hosted

Anton Vasilenko
Co-founder and CEO
Serial entrepreneur with 450+ franchise units in his portfolio (Cluborg Group). Co-founded the IT company IZI

Vladislav Belyanin
Co-founder and CEO
Built True Gamers into a 160-venue global network, UAE-based holding. Co-founded IZI (IT)

Viktor Androsov
Chief Design Engineer
Industrial automation engineer. Designed and built the TG Pod prototype



Daria Kameko
CMO
Former Head of Brand for the international divisions of Yango and Unilever. Worked across 35+ markets

James Akhvukh
CEO of IZI
Former full-stack developer at startups and large companies including Yandex and Adform. Leads a team of 20

» Quiet in a public place **cannot be booked**

Either it does not exist or it costs as much as a business-class ticket. Calls are taken standing by a terminal window, decks are put together in a noisy coffee shop, an hour of waiting is killed on a phone.

We ran into this inside our own network. The product grew out of our own pain, not out of a slide about trends.

For the person

Nowhere to shut the door for an hour

No place to talk, to focus, or simply to switch off.

For the venue

Footfall without revenue

The flow of people is there, the revenue per waiting hour is not. Building your own space means a lease, a fit-out and staff.

For the market

No unit you can replicate

Either silent low-tech booths or venues that carry a heavy operating load.

» Plugged into a socket and selling hours on the same day

The pod needs only floor space, a socket and a network connection. Ventilation and climate control are built in; no plumbing and no extraction shaft. It is a finished product rather than a construction project: it arrives assembled, is installed in four hours and moves to another location just as easily.

Inside is current gaming and work-grade equipment. The configuration is updated to suit the venue and does not tie the product to one hardware generation.

Work

A closed door for a call

Play

A full gaming station

Study

A room to study in

Rest

An hour that is yours alone

2-4 m²
floor space required

220V +data
a standard socket

0 staff
no shifts on site

4 hours
from crate to first booking

Built-in climate
ventilation and air conditioning inside

2400×2600×1600
clears a freight lift and a double doorway

>30 dB
sound insulation

» We did not assume demand. **We measured it**

Across three True Gamers clubs in Dubai in April and July 2026 guests paid for 7,817 sessions. We measured how many hours a day people actually buy on a single gaming seat. **The company model assumes 4.6 hours: 29% below the weakest month on record.**

Avg Occupied Devices per Hour

	0:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Mon						0.2	2.0	4.6	5.8	6.0	6.0	4.4	3.8	7.6	7.2	9.4	13.2	9.8	0.4					
Tue								3.0	3.8	7.0	7.8	7.8	7.0	5.8	8.3	11.8	12.5	8.0						
Wed							1.0	2.0	2.3	4.0	5.0	9.8	12.0	9.0	10.5	11.8	15.0	8.5						
Thu							1.0	3.5	4.8	5.5	4.8	6.8	7.8	10.3	13.0	17.0	19.0	14.8	10.5	3.8				
Fri							0.3	0.8	0.8	6.8	7.3	15.5	13.8	13.3	17.8	20.3	19.0	18.3	13.8	5.5				
Sat							2.2	4.2	3.8	7.6	11.0	13.8	11.2	12.0	15.4	16.6	21.2	20.6	12.4	5.2				
Sun							1.0	2.6	5.0	6.2	6.8	9.4	7.0	13.4	16.0	18.0	17.4	13.6	10.6	4.8				

6.4 hours
bought per day in the quiet season

9.4 hours
bought per day in the busy season

4.6 hours
assumed in our own model

–29%
below the weakest month on record

And thirty-two more venue types where people wait from 40 minutes to four hours

Tyre fitting · Detailing and car washes · Oil change and fast service · Car accessory fitting · Car auctions and vehicle sourcing · Vehicle registration offices · Government service centres · Immigration centres · Visa and consular centres · Bank branches · Insurance centres · Property registration offices · Developer showrooms · Clinics and diagnostic centres · Dental and orthodontic practices · Veterinary clinics · Pet grooming salons · Beauty salons · Barbershops and beauty spaces ·Electronics repair services · Appliance service centres · Self- service laundries · Furniture and interior showrooms · DIY superstores · Print and photo centres · Tailoring and premium dry cleaning · Self-storage facilities · Expos and conferences · Cruise ships · Highway charging stations

TG»POD

A pod has more reasons to walk in than a club

In a club people pay for gaming only. In a pod the same hours are also bought for work, study, calls and rest. That makes carrying the number over from club to pod a cautious step, not a bold one.

Eight core venue types:

- Airports and rail hubs
- Shopping malls
- Car service and dealerships
- Hotels and resorts
- Business centres
- Universities
- EV charging hubs
- Coffee shop chains

» We sell hours, not a box

Acoustic booths exist, but they are sold to offices as furniture: a one-off transaction with no hourly monetisation. We run the full cycle with no people on either side. Nobody is competing for the market of quiet, privacy and focus, and we intend to lead it.

THE FULL SESSION CYCLE RUNS IN IZI WITH NO STAFF INVOLVED

01 / Found on the map

02 / Booked and paid

03 / Entered with a QR-code

04 / Set light and climate

05 / Extended from the app

06 / Owner sees the revenue

Full technology ownership

Cabin, electronics, firmware and platform were built by one group. All intellectual property belongs to the TG Pods holding company.

Cabin
Patented shell, layout and acoustics

Electronics
Own boards, every node in a single loop

Firmware
Access, light, climate, power, safety

IZI platform
Sessions, tariffs, payments, telemetry, reporting

Manufacturing
Our own line at a contract facility in China

» Three sessions a day are enough

Three sessions a day of ninety minutes at $15 an hour plus advertising on the shell produce $2,552 of monthly revenue at mature inventory fill. That is 4.6 paid hours, 29% below what we measured in the clubs. This single figure drives our own pod, the buyer's pod and the entire development plan.

OUR OWN POD

Capex $15,500 · Cash flow $1,661 a month

- **9.3 mo** payback
- **65%** cash margin
- **129%** annual return on capital

THE BUYER'S POD

Capex $18,300 · Cash flow $1,150 a month

- **15.6 mo** payback
- **46%** cash margin
- **77%** annual return on capital

A SOLD POD FOR US

LTV $14,138 · Acquisition cost $1,250

- **11.3x** LTV to acquisition cost
- **$1,500** cash at the deal
- **$431** a month in royalties

Five revenue streams for the group

01 — ONE-OFF

Unit sale

A $2,500 margin from 2028, once landed cost drops

02 — RECURRING

20% royalty

$410 a month from every pod in operation

03 — RECURRING

Territory rights

Master partner fees by city and country

04 — RECURRING

Advertising on the shell

From $300 to $500 a month per pod as inventory fills

05 — RECURRING

IZI licence

White label for operators running their own pods

By 2035, 83% of revenue is recurring

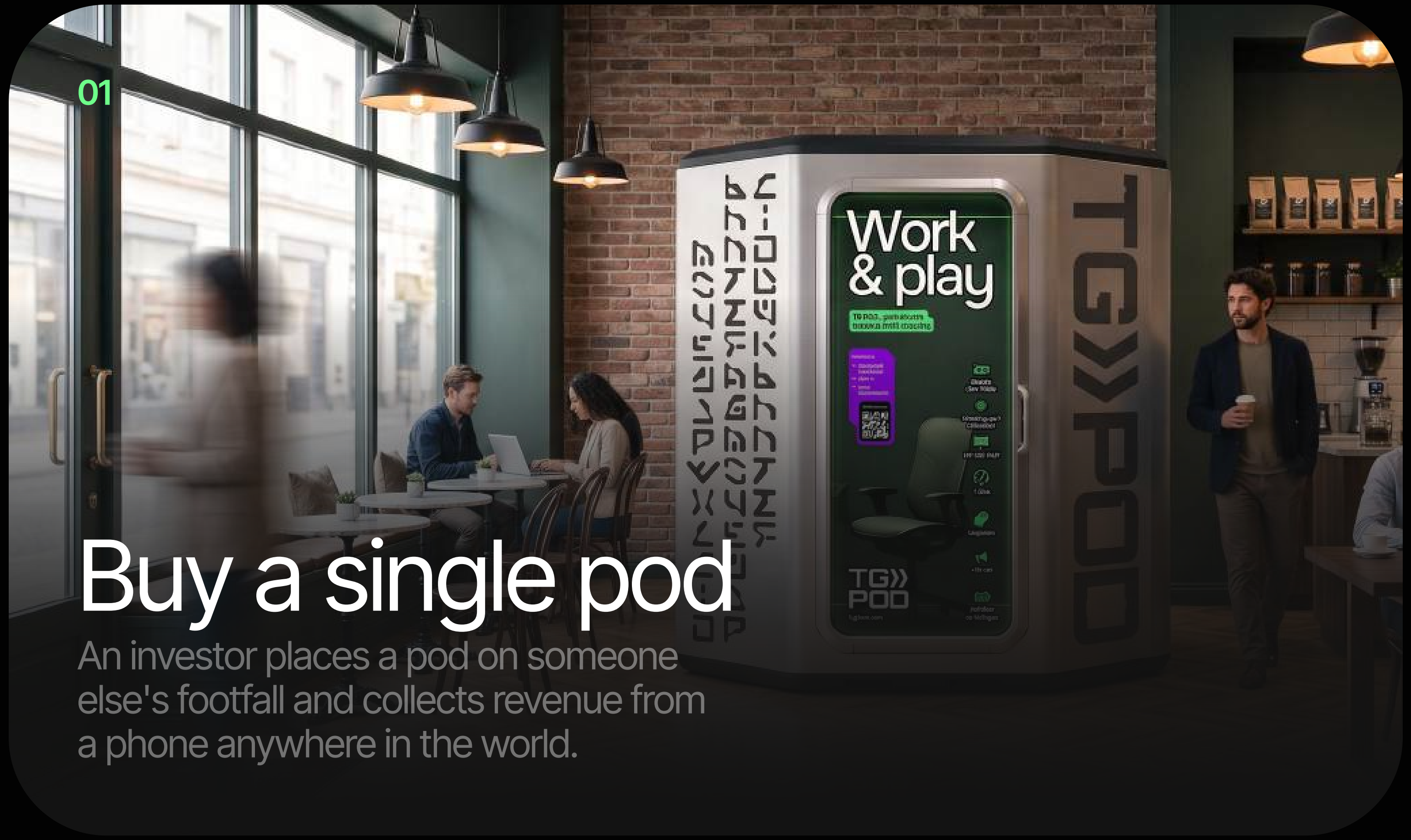
Royalties, the owned network and advertising overtake hardware sales. By 2035, 83% of revenue is recurring.

A weak site means a move, not a write-off

No plumbing and no permanent fit-out. A poor location costs one transport run rather than the investment.

Thousands of pods without our capital behind every site

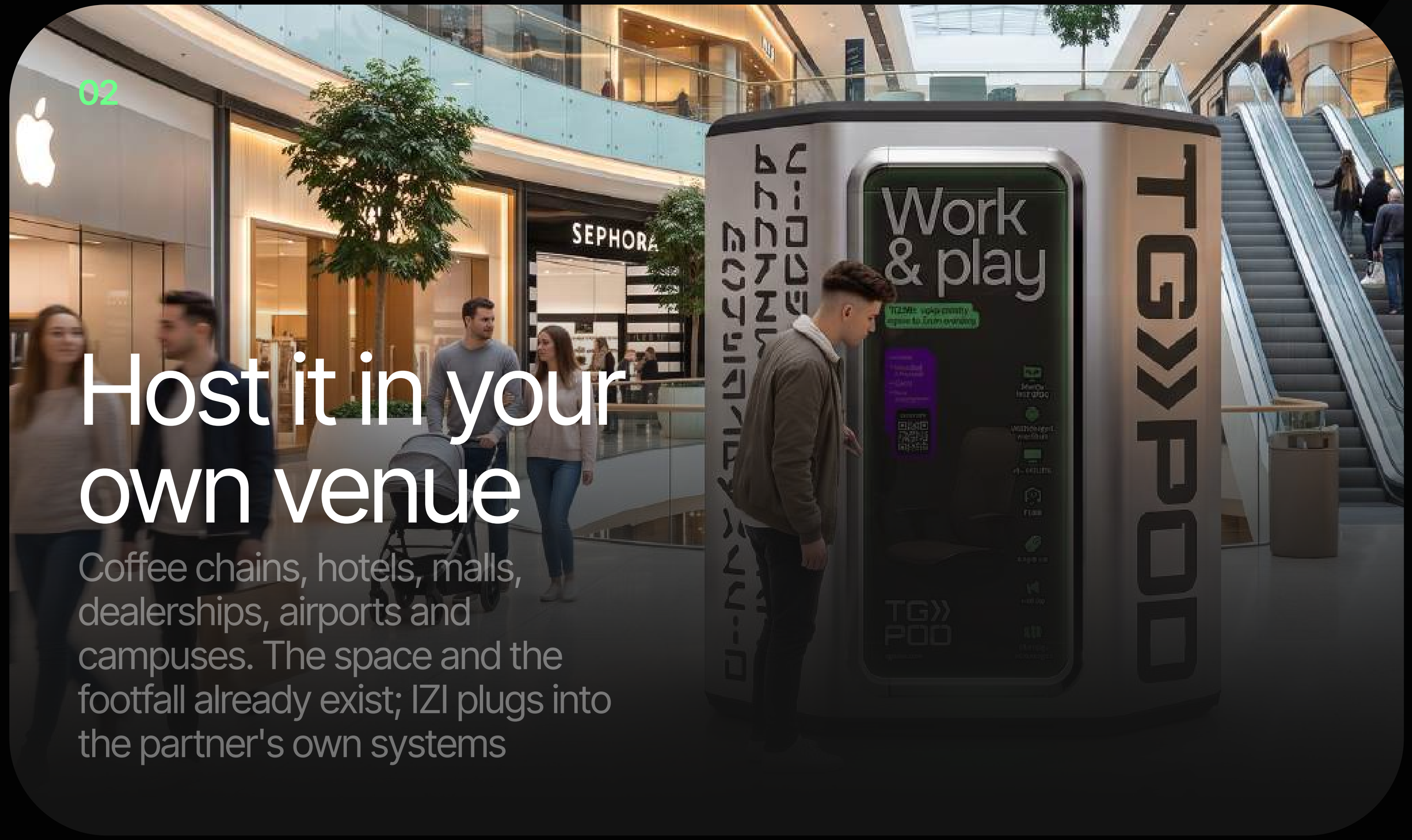
A partner is not an equipment buyer, but a node of the network. Hardware ownership passes to the partner while the platform, the standard and the data stay with the group. All scenarios are identical until 2028; after that the path splits, and the split is already modelled.



01

Buy a single pod

An investor places a pod on someone else's footfall and collects revenue from a phone anywhere in the world.



02

Host it in your own venue

Coffee chains, hotels, malls, dealerships, airports and campuses. The space and the footfall already exist; IZI plugs into the partner's own systems

03

Take a territory

A batch of pods or exclusive rights to a city or country. One dashboard for the whole network.

The 2028 fork: three modelled scenarios

Base franchise

1,779 pods by 2035
Second tranche **$1.6M**
Valuation **$10.0M**

The least capital required and half the valuation

Corporate network

3,842 pods
Second tranche **$3.6M**
Valuation **$36.6M**

The most capital-hungry route; equipment leasing suits it better than equity

Accelerated franchise

3,671 pods
Second tranche **$2.4M**
Valuation **$20.9M**

The chosen scenario: twice the valuation of the first at a third of the capital need of the second

MANUFACTURING
China, our own line under contract

CENTRAL HUB
Dubai
R&D, the IZI platform, shipping, 24/7 monitoring, billing

LOGISTICS
Batch shipping to any region

TG»POD

» By 2035 we hold 16% of the serviceable market

Capacity is built bottom-up across 40 priority metro areas and eight placement channels, anchored on actual airport passenger volumes, hotel room stock and student numbers. Hardware and software are counted as two separate streams.

Market level	Capacity	Hardware · pod supply, one-off	Software · royalties and platform, per year
TAM · 40 metro areas worldwide	66,200	$993M	$326M
SAM · GCC, Europe, North America	23,060	$346M	$114M
SOM · our plan to 2035	3,671	$67M	$18.4M

Capacity is stated in pods. TAM and SAM use a pod price of $15,000 and $4,925 of annual royalty per operating pod. The SOM line comes from the financial model: hardware cumulative for 2026–2035, software for 2035. The owned network and advertising add a further $38.9M by 2035, and the hardware share of company revenue falls from 32% in 2030 to 17% in 2035.

Development plan, accelerated franchise scenario

2026 — First batch and anchor sites
Pods in network: 7
Market: UAE
Revenue: $0.2M

2027 — Sales ramp-up across the GCC
Pods in network: 101
Market: GCC
Revenue: $2.7M

2028 — Europe entry, EBITDA turns positive
Pods in network: 370
Market: GCC+Europe
Revenue: $8.3M
EBITDA: $0.7M

2030 — Europe scale-up
Pods in network: 1,182
Market: waves 1 and 2
Revenue: $20.4M
EBITDA: $6.7M

2035 — Platform outweighs hardware
Pods in network: 3,671
Market: all three waves
Revenue: $69.2M
EBITDA: $33.1M

» Investment offer

The calculated valuation is $20.9M: a 6x multiple on 2031 EBITDA discounted to today. The deal is priced at $17.5M, 16% below that figure. A discounted cash flow gives $33.0M, so the company is priced on the lower of two independent methods.

USE OF FUNDS, 2026–2027

$1.10M · Owned network	Capex to install the first owned pods: the network's showcase and its advertising revenue base
$0.30M · Inventory	Working capital tied up in pods held in the UAE warehouse ahead of sale and installation
$1.04M · Operating runway	Covers the 2026–2027 loss until EBITDA turns positive in 2028
$0.50M · Certification	Civil defence, electrical approvals, venue sign-offs and local codes
$0.45M · Product rights	Buying out the moulds and engineering documentation; without this the factory can sell the same pod to competitors
$0.11M · Contingency	Reserve against certification timelines, FX movements on yuan purchases and legal costs

×4.2
return on investment by 2031

×16.0
return on investment by 2035

IRR ~36%
a year over the horizon to 2035

$18.6M
in dividends between 2030 and 2035

Raising

$3.5M

for a 20% stake in TG Pods

Pre-money valuation	$14.0M
Post-money valuation	$17.5M
Calculated valuation	$20.9M
Discount to calculation	16%

Security

The first layer is TG Pods' own assets: the design patent, the IZI platform, the tooling and the venue contracts. The second layer is a put option on a stake in the True Gamers holding company, exercisable if agreed milestones are missed.

»

You are not buying the idea of a pod. You are buying the experience, the mistakes already paid for and the vision of an industry leader

160 clubs, eight countries and 120,000 guests a month have already paid for the mistakes a new product usually learns from. TG Pods carries that experience into a separate company with its own patent, its own platform and a clear unit of scale.

Co-founder and CEO
»
Vladislav Belyanin

+971 585 650 112