

CONFIDENTIAL · ANGEL ROUND

Bobby DeMario

Building the next great independent
music rights business.

Raising \$400,000 · the artist is the company



THE FOUNDER

He de-risked himself before asking for a dollar.

504

full songs written, hundreds of demos — 8 years of deliberate craft before raising

~\$81K

cumulative self-generated revenue, verified across 3 payment rails — a UGC agency with ~51 active brand clients

40+

AI agents built solo — an operating company that runs content, posting, analytics and outreach without headcount

\$14K

record deal offered before he had any following — he kept his masters instead and built the machine



“When capital became the bottleneck, he built businesses capable of funding the mission.”

— Investment Committee Memo

Music catalogs became an institutional asset class.

\$1.27B

Queen catalog — Sony, 2024

\$200M+

Justin Bieber catalog — Hipgnosis

13–18x

revenue multiples on quality catalogs

Institutional capital — Blackstone, KKR, Apollo — now buys music royalties as a durable, uncorrelated yield asset. *Comps are asset-class evidence, not projections.*

What changed for independents

Distribution, audience, data and AI operations — the stack majors monopolized — can now be owned by one artist. **And when the artist owns 100% of masters and publishing, every dollar of catalog value accrues to the company.**

Artists rent everything — so nothing compounds.

Rented audience

Followers live on platforms. One algorithm change erases years of reach.

Evaporating spend

Marketing dollars buy impressions, not assets. Nothing is owned after the campaign.

Zero every release

Each song restarts from nothing — no permanent demand carries over.

Middlemen own the data

Labels, agencies and platforms keep the margin and the learning.

“Most artists don’t fail from lack of ambition. They run out of runway before the data becomes meaningful.”

THE SOLUTION

An operating system that turns spend into owned assets.

Fan pages

A network of owned theme pages that recruit fans permanently — \$20 builds a page that produces fans every year.

Forever Pre-Savers

Fans who automatically save every future release. Permanent, compounding demand — owned, not rented.

Owned playlists

Owned distribution: playlists that stream the catalog daily and generate artist leads as a byproduct.

Weekly releases

12 flagship songs per year — 60 masters by Year 5, 100% owned, masters and publishing.

AI operations

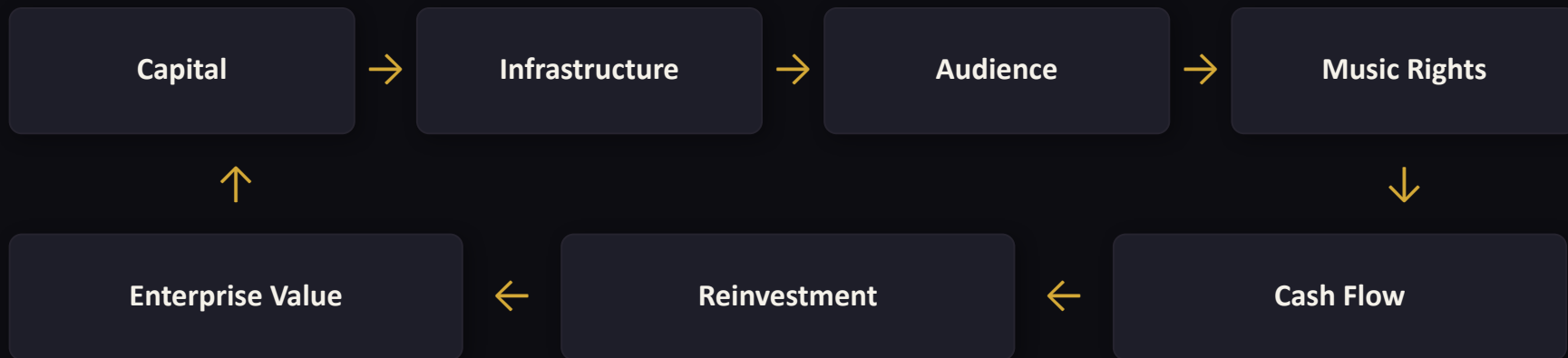
40+ agents already run content, posting, analytics and outreach. Structural cost advantage over any label.

Backend SaaS

Leverage Music monetizes the same infrastructure to other artists — recurring revenue behind the artist.

The hero is the artist. The infrastructure exists to make every release bigger than the last.

Every dollar becomes an asset that feeds the next.



Marketing spend becomes infrastructure. Infrastructure becomes permanent demand.
Permanent demand becomes music rights value.

TRACTION — HISTORICAL, VERIFIED

The machine already works at small scale.

333,581

Spotify streams, 10 songs

+126%

streams, 28 days to Jul 1

4,908

Forever Pre-Savers (live)

202K

total pre-saves collected

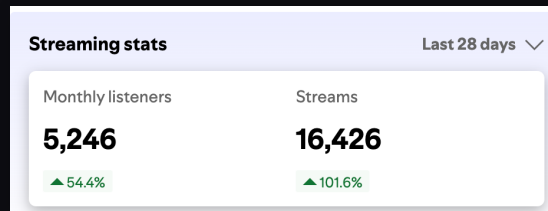
43.8K

Instagram followers

1.4M

YouTube Shorts views

Plus: 17K saves (+11,534%), 7.9K Spotify followers, 83.5K owned fanbase (7,489 emails), ~\$81K cumulative business revenue — and playlist submission income already hitting the bank.



Spotify for Artists — 28-day window to Jun 29

Every claim is documented.

12-folder data room: revenue rails, contracts, dashboards, agents.

Every stream pays twice. The stack pays a third time.

Master recordings

100% owned

The artist owns every master outright. Streaming royalties flow directly to the company — no label split.

Publishing

100% owned

Bobby writes everything. Songwriter royalties add ~25% on top of master revenue for the same stream.

Backend SaaS

\$99 / month

Leverage Music sells artist services to leads generated free by the playlist network. Recurring, behind the artist.

Deliberately excluded from the model: touring, merch, memberships, sync, brand partnerships. All upside, none of it needed for the thesis.

Measured, not imagined.

\$0.67

cost per Forever Pre-Saver

\$20 fan page produces ~30 permanent pre-savers per year. A live page (@singerboybobby) delivered 42 this past year.

7.76

measured streams / pre-saver / release

From real data: 333,581 streams ÷ 4,300 pre-savers. Best song: 34.6. Model base: 12.

\$1,000

all-in cost per flagship release

A Year-1 release reaches ~300K lifetime streams; the same \$1,000 song reaches ~1.8M at Year-5 audience scale.

330%

playlist self-funding ratio

\$300 builds a playlist (~51K streams/yr). Submission revenue runs ~3.3x ad spend — curator payouts already hitting the bank today.

Plus SaaS: \$396 LTV at effectively \$0 CAC — leads are a free byproduct of the playlist network.

What \$1 turns into.

FAN PAGES → FOREVER PRE-SAVERS

\$1 → ~\$4.90

by Year 5 — streaming royalties only

= \$0.80 streaming royalties + \$4.09 asset value (15x)
— and still climbing after Year 5

Break-even: Month ~12 counting the asset · ~Year 6 on cash alone

NOT counted above: merch, tickets and direct sales to every fan's email + location — no data yet, pure upside.

OWNED PLAYLISTS

\$1 → ~\$13.50

by Year 5 — streaming royalties only

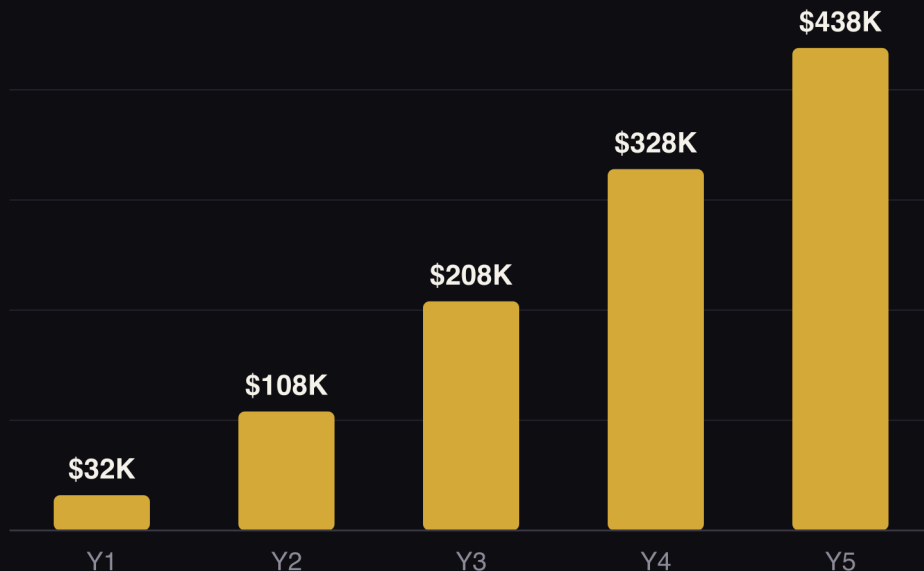
= \$3.30 streaming royalties + \$10.22 asset value (15x)
— steady for as long as the network runs

Break-even: Month ~2 counting the asset · Month ~18 on cash alone

NOT counted above: SaaS revenue from artist leads, and ad spend covered ~3.3x by submission income.

So why not put every dollar into playlists? Because a Forever Pre-Saver is a person I own the relationship with — playlist streams are anonymous. Forced to pick one: pre-savers — slower cash, stronger company. Asset value = 15x annual royalties, the standard music-rights multiple. Base scenario, auditable in the workbook.

A conservative engine with an auditable floor.



Modeled revenue, base scenario (streaming + SaaS)

Year-5 enterprise value (management target)

Conservative

10x catalog · 3x SaaS

\$9.0M

Base

15x catalog · 5x SaaS

\$13.75M

Strong

18x catalog · 7x SaaS

\$17.0M

Bottoms-up modeled floor: \$4.4M (Base). The target band assumes the catalog performs at the 34.6 streams/pre-saver one song already achieved. Year-5 EBITDA +\$118K; no additional equity required. The live workbook reconciles both views.

USE OF FUNDS

\$400K = the full 24-month build, with buffer.

Founder salary (24 mo)  \$140K

Artist development  \$36K

Production + videos  \$36K

Fan pages (build + ops)  \$32K

Playlist buildout  \$30K

Content engine  \$24K

AI development  \$24K

VA team  \$24K

Software / CRM  \$20K

Legal / accounting  \$20K

Contingency buffer  \$14K

What it buys by Month 24

1,000

owned fan pages

200

owned playlists

24

owned masters + videos

~28K

Forever Pre-Savers

The \$400K covers the full 24-month build on its own. Early revenue the business earns along the way (~\$154K modeled) is extra cushion on top — the round is build capital, not payroll.

Why Bobby wins.

Owned audience

Fan pages, pre-savers, emails — demand that can't be de-platformed or rented back.

100% ownership

Masters and publishing. Every dollar of catalog value accrues to this company.

AI cost structure

40+ agents built solo. Label-scale operations at a fraction of label-scale cost.

Proven allocator

Already turned skills into ~\$81K of business revenue and reinvested it into the mission.

Execution velocity

504 songs written. Weekly release cadence. Systems, not resolutions.

Founder = product

Nobody outworks the person whose own career is the asset being compounded.

“The tools will commoditize. Judgment won’t.”

Ten years of compounding, funded by the catalog itself.

M0-6

Build

500 fan pages, 100 playlists,
AI ops, release engine live

M7-18

First cycle

Pre-savers, streams, first
SaaS revenue, catalog cash
flow begins

M19-30

Compound

Reinvest: 1,000 pages, 200
playlists, ~50K pre-savers

Y3-5

Scale

3,000 pages, 500 playlists,
145K pre-savers, 60 masters

Y5-10

Leverage

Advances, JV optionality,
catalog value compounding

Distribution advances become the growth engine: \$75K-\$1.75M of non-dilutive capital unlocks as royalties grow. Label partnerships become leverage the company can choose — never a dependency it needs.

Six paths to liquidity — dependent on none.

1 Partial catalog sale

Sell a slice of proven royalties at 10–18x while keeping control

2 Royalty financing

Non-dilutive advances against catalog cash flow

3 Distribution deal

Advance + upstreaming from AWAL / Orchard relationships already in place

4 Major label JV

Partner from strength — infrastructure makes it leverage, not rescue

5 Strategic acquisition

Catalog + audience + AI stack as an acquirable platform

6 Stay independent

Distribute cash flow — the base case is a business, not an exit bet

Management optimizes enterprise value — not a predetermined exit.

THE INVESTMENT

\$400,000 to build the machine that builds the artist.

What the company owns

Every dollar of the raise builds assets held inside the company:

- 100% of every master recording
- 100% of all publishing
- The fan page + playlist network
- The AI operating system
- Leverage Music backend SaaS

Why now: the system is proven at small scale. Capital — not talent, not infrastructure — is the bottleneck.

The raise

\$400,000

The complete 24-month build budget — catalog, audience, infrastructure.

Downside protection: even if growth stalls, the capital has built owned assets — masters, publishing, fan list, playlists — with a modeled floor value of \$4.4M.

Structure and terms: discussed in person.



“The only thing that ever stopped me from building
a million-dollar company was my music.

So I made my music the company.”

— Bobby DeMario

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