

ENGINEERED NUTRITION

TRACTION & METRICS · BREAKDOWN

CONFIDENTIAL
PREPARED FOR INVESTOR REVIEW · 2026

\$425K+

LIFETIME SALES

\$194K

2025 REVENUE

~2,100

CUSTOMERS

350

SUBSCRIBERS

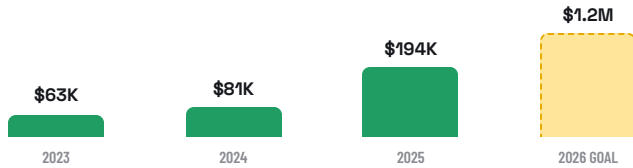
61%

GROSS MARGIN

5.2x

LTV : CAC

REVENUE TRAJECTORY



2.4x year-over-year from 2024 to 2025 on minimal paid spend. 2023–2025 are verified cash-basis from QuickBooks and Shopify; 2026 is the goal gated on this raise.

Peak monthly revenue reached **\$25K** before the Q2 2026 inventory sell-through.

CHANNELS (TRAILING 12 MONTHS)

DIRECT

\$119K+/yr

AOV	\$40
Subscription mix	51%
Renewal rate	75%
Platform	Shopify

AMAZON

\$53K+/yr

AOV	\$27
Flavors on S&S	5
Of orders on S&S	17.5%
Marketplace	US

WHOLESALE

\$19K+/yr

Doors	129
States	27
Gym repeat	~70%
Top region	Northeast

RETENTION – MONTH-1 COHORTS

COHORT WINDOW	AVG MONTH-1 RETENTION
Mar–Jun 2025	8.3%
Jul–Oct 2025	13.0%
Dec 2025–Jan 2026	~40%

Month-1 retention stepped up ~15x as subscription mix climbed from 14% to 51% of revenue.

CUSTOMER LOYALTY & PROOF

Verified reviews	356
Average rating	4.8 / 5
Five-star share	80%
Lifetime refund rate	<1%
Sub-MRR growth (6 mo)	+116%

UNIT ECONOMICS & MARGIN PATH

\$157

CUSTOMER LTV

\$30

BLENDED CAC

1.5 mo

CAC PAYBACK

\$0.20

COST / STICK (VS -\$1)

61→78%

GROSS-MARGIN PATH

Gross margin expands structurally as the co-manufacturer installs stick-pack equipment exclusive to EN: 61% today → 75% at Series A → 78% by 2030.

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