

Logicot OS round economics / dilution note

A short private-style note on dilution scenarios, valuation rails and what stays outside the public investor page.

\$750k

Pre-seed round size

15-18%

Target dilution zone

20%

Hard dilution ceiling

**\$5.0M
post**

Illustrative post-money at 15%

PUBLIC FRAMING

- Publicly, Logicot keeps only Pre-seed / \$750k / USD, use of funds and milestones to the next fundable milestone.
- The cap table, SAFE cap, option-pool mechanics and investor-specific legal terms do not belong on the public site.
- The round logic is tied to the next milestone, not to a public valuation claim.

ILLUSTRATIVE DILUTION SCENARIOS

- 15% dilution: \$4.25M pre-money / \$5.0M post-money.
- 18% dilution: \$3.42M pre-money / \$4.17M post-money.
- 20% dilution: \$3.0M pre-money / \$3.75M post-money.
- Above 20% should be treated as a stretch case rather than as the base negotiating target.

NEGOTIATION RAILS

- The working zone is 15-18% dilution while preserving credible runway to the next fundable milestone.
- 20% is the upper boundary and should be treated as a hard ceiling rather than a target outcome.
- SAFE versus priced round depends on the lead investor, process speed and jurisdictional round logic.
- The next valuation step should be justified by delivery depth, pilot motion and commercial proof rather than by narrative alone.

Illustrative round-economics note. This is not an offer, valuation guidance or a legal document.