Health Monitoring Startup

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Investment framework

Assess the business model, customer demand, competitive alternatives and operating constraints. Separate observed performance from forecast assumptions and hypothetical transaction terms.

Financial analysis

Translate volume, pricing, margins, capital expenditure and working capital into cash flow. Reconcile annual totals and test the impact of delayed collections, weaker retention or higher input costs.

Valuation and financing

Use discounted cash flows and comparable valuation ranges with explicit assumptions. Evaluate dilution or leverage against downside liquidity, and require a clear investment rationale beyond headline growth.

Diligence priorities

Validate customer concentration, contractual obligations, revenue recognition and ownership rights. Identify which missing evidence could change the proposed valuation or financing structure.