INVESTOR BOOK · PRE-SEED · 1 SEPTEMBER 2026

Type a sentence. Get a song.

Octa is a mobile-first AI music studio: anyone can turn an idea into a fully produced song with sung vocals, sing it in their own cloned voice, remix and extend it, and share it to a built-in short-video feed — in minutes, from a phone.

2,691
songs created by users

572
signups in August (+161% MoM)

0.00%
user-perceived crash rate

4.40★
Google Play rating

investors@octaverum.com · octaverum.com

A consumer music-creation product with a working paid funnel, now compounding month over month.

Octa launched on Google Play in late 2025 and on the web in September 2026. It is founder-funded, built by a six-person team, and already shows the three signals a pre-seed investor looks for: people come back to create, a meaningful share pays within minutes, and the product is technically solid enough to scale acquisition.

1,249
authenticated accounts
signed in at least once · excl. internal/test

572
signups, August 2026
+161% vs July (219)

1,309
songs created, August 2026
+90% vs July (690)

316
distinct creators, August
+99% vs July (159)

106
unique paying customers
25 active paid subscriptions today

8.5%
signup → paid (all time)
activated → paid 13.0%

≈8 min
median time to first payment
81% of payers pay within 24h

1,290
Play device acquisitions, 28d
+71% vs prior 28d · MAD 578 (+39%)

What is working

- **Activation is fast.** 51% of signups create a song; median time from signup to first finished track is **3.5 minutes**; 89% do it within the first hour.
- **Willingness to pay is real.** 106 unique paying customers; 8.5% of all signups and 13.0% of activated users have paid. Median time to first payment: **≈8 minutes** after signup.
- **Growth is accelerating.** Last 7 days vs. previous 7: signups +290%, songs +185%. Last 30 vs. previous 30: signups +170%, songs +100%, active creators +109%.
- **Quality is a moat for acquisition.** 0.00% user-perceived crash and ANR rates on Play (thresholds: 1.09% / 0.47%), 99.8% generation completion, 4.40★ lifetime rating.

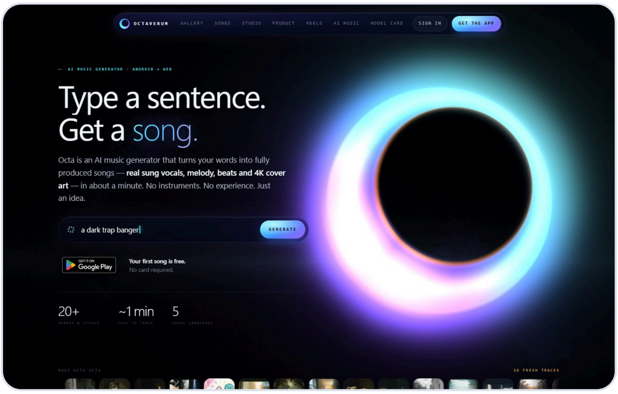
What the round buys

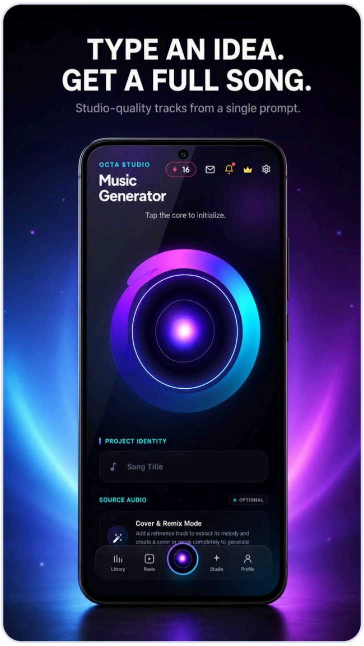
- Paid acquisition at the campaign structure that already returned **3.0× ROAS** in a 30-day window (see §08), scaled carefully within measured limits.
- Retention loops that are already in flight — the creator feed, daily creation hooks and one-tap release to streaming platforms.
- iOS, and the proprietary model layer (vocal tuning, voice pipeline, recommendation) that raises margin and differentiation over time.

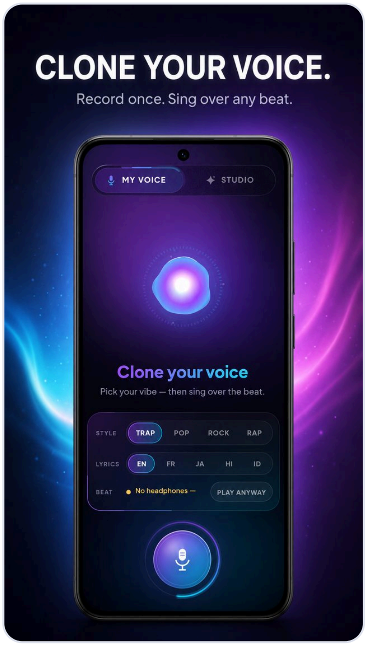
Honest framing. Revenue is small today (≈₺3,240 / ≈$79 per 28 days on Play) and early retention is below consumer benchmarks (§10). What is unusual is the strength of intent: people pay in the first session. The plan is to convert that intent into a habit.

One prompt in, a finished song out — then a voice, a video and an audience.

Octa collapses the distance between an idea and a shareable song. The core loop is deliberately short: describe a feeling or a story, get a fully produced track with real sung vocals and cover art in about a minute, then keep going — sing it yourself, extend it, split the stems, cut a video, post it.







Create

Text-to-song with vocals in 20+ genres and 5 lyric languages; instrumental mode; a conversational generator ("Nova") that turns a chat into a brief; lyric editing and section replacement.

Make it yours

My Voice: record once, sing over any beat with your cloned voice (89 clones created). Covers, extensions, stem separation (115 stem splits), playlists, an infinite AI radio (247 sessions).

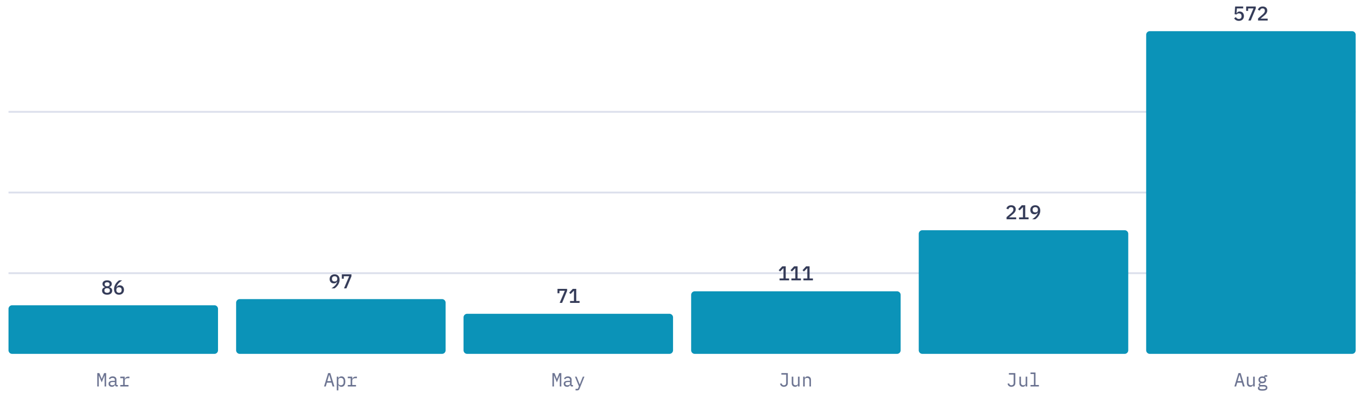
Share

An in-app Reels-style feed of music videos with likes, comments, follows and DMs; lyric-video rendering on GPU; share pages on the web; one-tap release to streaming platforms is the next milestone.

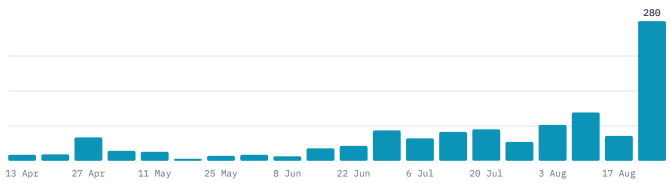
> **Two surfaces, one account.** Android app (Google Play, "1K+ installs" badge) and a full web studio at octaverum.com (launched 1 Sep 2026) share the same library, credits and social graph. Plans: monthly subscriptions plus one-time track packs; web checkout is live.

Signups have grown every month since April; August was +161% vs July.

All user figures in this book count **authenticated accounts only** — people who signed in at least once. Internal and test accounts are excluded everywhere (see §17 Methodology).



Signups per month · March–August 2026



Signups per ISO week · mid-April → end of August

320
last 7 days
prev 7d: 82 (+290%)

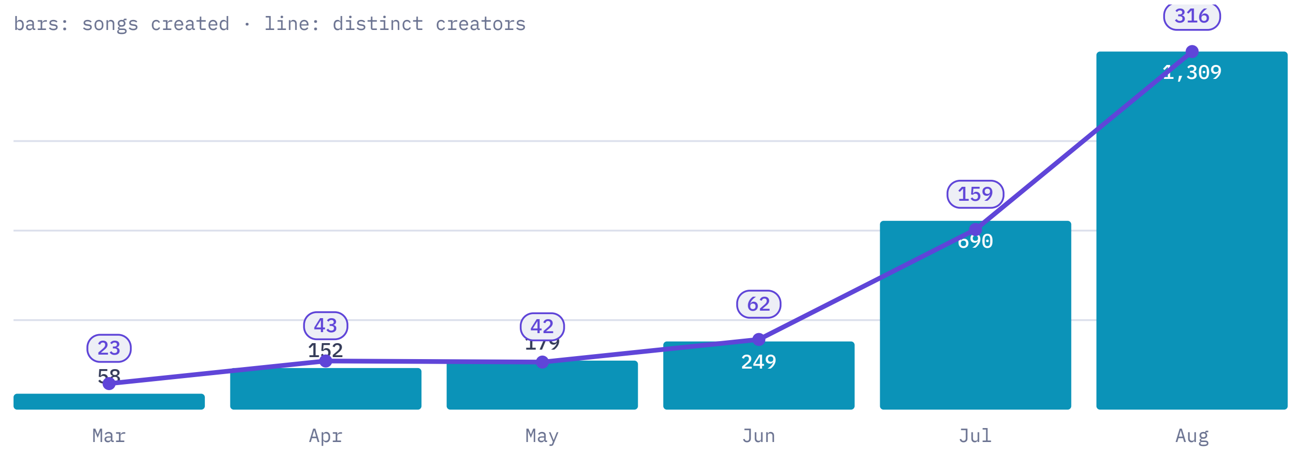
581
last 30 days
prev 30d: 215 (+170%)

1,290
Play device acquisitions, 28d
+71% vs prior 28d

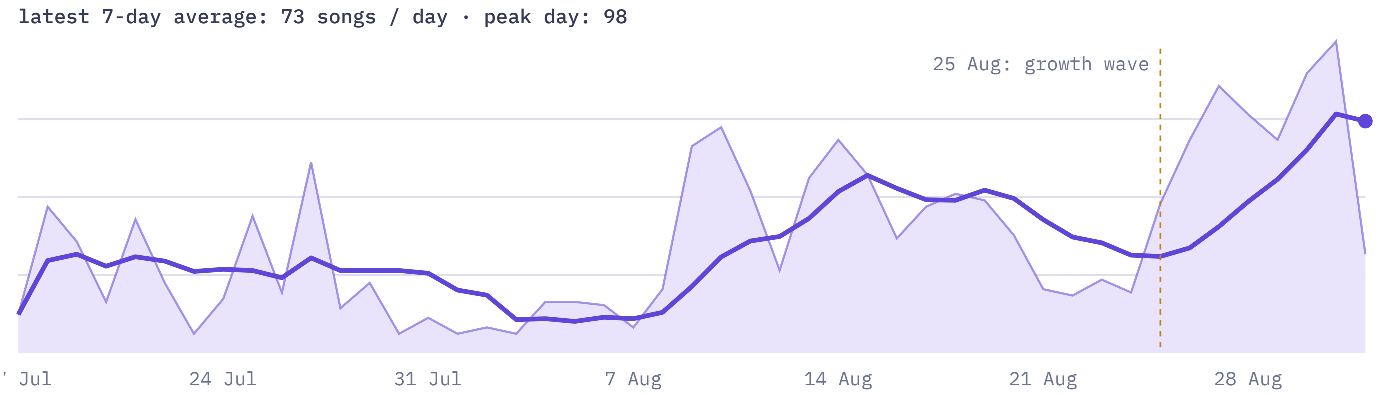
578
Play monthly active devices
+39% vs prior 28d

Sign-in mix: **69%** Google, 31% email. No paid campaign was running for most of the late-August wave (§08); the step-up coincided with a store-listing refresh, a reactivation email programme and the first web-studio traffic.

Creation is compounding faster than signups: 1,309 songs in August, +90% vs July.



Songs completed per month (bars) and distinct creators (line) · Mar–Aug 2026



Songs per day, last 45 days, with 7-day average · dashed marker: 25 Aug growth wave (store-listing refresh + reactivation email)

551
songs, last 7 days
prev 7d: 193 (+185%)

1,330
songs, last 30 days
prev 30d: 665 (+100%)

324
creators, last 30 days
prev 30d: 155 (+109%)

Source: production database, completed generations by authenticated accounts. Total songs to date: 2,691. What people make: dark, hip-hop, trap, pop, electronic, energetic, rap, r&b.

Half of everyone who signs up finishes a song — in under four minutes.

Funnel over all accounts to date. Payment rate is 12.9% of activated users.

3.5 min
median time to first song
from account creation

89%
first song within 1 hour
within 24h: 95%

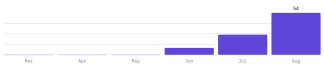
641
distinct creators to date
324 in the last 30 days

99.8%
generation completion
7 failed of 3,667 all time

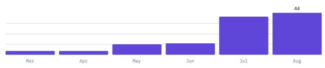
Depth per creator: 39% made one song, 48% made 2–5, 10% made 6–20 and 20 creators made more than 20. Median songs per creator: 2. A third of tracks are instrumental (34%).

Feature adoption by month

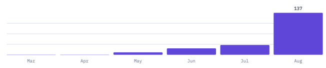
VOICE CLONES



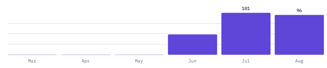
STEM SPLITS



REELS POSTED



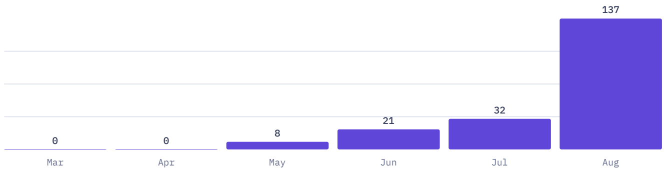
RADIO SESSIONS



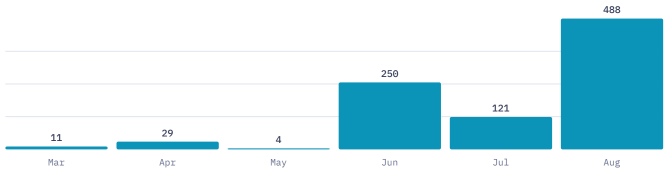
06 · THE SOCIAL LAYER

The feed turned on in August: 137 reels posted, +328% vs July.

Every song can become a short music video and be posted to an in-app feed with likes, comments, follows and direct messages. The feed is what turns a one-off creation tool into a place people return to — and it is where Octa is structurally different from desktop-first generators.



Reels posted per month

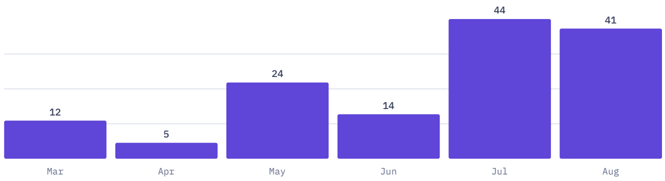


Likes given per month

204	**91**	**160**	**29**
reels posted, total	comments, Aug	follow relationships	DM conversations
73 distinct posters	Jul: 29	between accounts	end-to-end encrypted

Why the feed matters commercially. Every reel is a distribution unit: it carries the song, the creator and an install/sign-up path. As release-to-DSP ships, the same post becomes the on-ramp to a track that earns on Spotify — the loop that turns creators into retained, paying users.

People pay in the first session: median 8 minutes from signup to first payment.



New paid subscriptions started per month · Mar–Aug 2026 (all channels)

SIGNUP COHORT	SIGNUPS	PAYERS	PAID RATE
Mar	86	5	**5.8%**
Apr	97	9	**9.3%**
May	71	7	**9.9%**
Jun	111	13	**11.7%**
Jul	219	41	**18.7%**
Aug	572	26	**4.5%**

Paid rate = share of each month's signups that have paid so far. August's cohort is 1–30 days old and still converting; July's 18.7% coincided with the correctly-targeted campaign (§08).

₺3,240
Play gross revenue, 28d
≈ $79 · +11% vs prior 28d

106
unique paying customers
16 paid more than once

81%
pay within 24h of signup
median ≈8 min

7.5 avg
songs used per paid period
median 1 → high gross margin

Pricing

Three monthly tiers on the web ($2.99 / $5.99 / $12.99) and equivalent Play subscriptions, plus one-time track packs (15 sold). Active paid mix today: Basic 19, Premium 6.

Play subscription health (last 6 months)

77 new subscriptions, 33 cancellations; 25 paid subscriptions active today after a clean-up that aligned every entitlement with Google Play's server-side truth (Aug 2026). Refunds: none recorded.

A song costs about six cents to make. The paid channel already returned 3× in the right configuration.

Cost side

- **≈$0.06 per generated song** (model capacity + storage); a paying customer uses 7.5 songs per period on average (median 1), so cost of goods on a $2.99–$12.99 plan is single-digit percent.
- Core infrastructure (API server, database, storage, CDN, GPU rendering) runs on a few hundred dollars per month today; it scales with usage, not with headcount.
- Free tier is tightly metered (a handful of songs per account), which keeps blended cost per signup at cents.

Lesson learned, in numbers

In August the account briefly optimised the Play campaign for *installs* instead of *purchases*: ₺5,499 bought 362 installs and 5 sales (0.2× ROAS). Switching the objective back to purchases restored the July pattern. Same product, same countries — only the bid objective changed: paid rate 18.5% (July) vs 6.9% (August).

Google Ads, purchase-optimised campaign

WINDOW	SPEND	INSTALLS	SALES	RETURN
30 days 26 Jul – 24 Aug 2026	₺1,073	28	6	**₺3,216 · 3.0×**
Jun 1 – Aug 23 cumulative	₺12,684	431	42	CPI ₺29 · CAC ₺302

Return = all-conversion value attributed by Google Ads (purchases + first-song events). ₺ figures as reported in the Ads account; ≈₺41 per $.

Why this matters. Acquisition is not the bottleneck — click-through rates of 6–10% show the creative works, and a purchase-optimised campaign is profitable at small scale. The measured ceiling today is a few thousand ₺ of contribution per month; the round is for the product loops that raise LTV and widen that ceiling, not for buying installs.

Zero user-perceived crashes. Zero ANRs. 99.8% of generations complete.

0.00%	0.00%	99.8%	4.40★
user-perceived crash rate	user-perceived ANR rate	generation completion	Play rating
Play threshold 1.09%	Play threshold 0.47%	7 failed of 3,667	lifetime · 4.35★ last 28d

Why it is this clean

- Native Android (Jetpack Compose) with GPU shaders for the signature visuals — no embedded web views in the creation path.
- A generation reliability layer on the server: automatic retry on transient engine errors, honest failure with instant credit refund on permanent ones, and a reconciler that recovers stuck jobs — including automatic recovery when a provider's media links expire (proven live on 1 Sep 2026).
- Server-side purchase verification against Google Play (RTDN + periodic sync), so entitlements can't drift from what customers actually paid.
- 29 production releases to date; the latest shipped on 31 Aug 2026 with a 100% rollout.

Store signals

- Google Play rating **4.40★** lifetime (4.35★ last 28 days).
- Android vitals: user-perceived crash rate **0.00%** and ANR rate **0.00%** over the last 28 days; Google's "bad behaviour" thresholds are 1.09% and 0.47% respectively. Being far under both thresholds protects store discoverability.
- Policy status clean; two 2026 policy notices were resolved in the same week they were raised.
- Support: in-app support channel with a multilingual assistant; the entire support backlog fits in one page.

Sources: Google Play Console → Android vitals, Ratings, Releases (read 1 September 2026); production database (generation outcomes).

Day-one return is the weak link; month-one return has improved 5× since May.

Octa today behaves like a high-intent transactional product: people arrive with a song in mind, make it (and often pay) in the first session, and many do not return the next day. That is the gap this round is meant to close, and the July cohort shows it is movable.

SIGNUP COHORT	N	DAY 0 ACTIVE	DAY 1 RETURN	WEEK 1 RETURN	MONTH 1 RETURN
Apr	97	43%	2%	4%	4%
May	71	52%	1%	8%	3%
Jun	111	70%	4%	9%	11%
Jul	219	70%	7%	21%	21%
Aug	540	48%	5%	14%	–

Activity = creating a song, posting a reel, liking, commenting, messaging or starting a radio session. Day 1 = any activity 24–48h after signup; Week 1 = days 1–7; Month 1 = days 8–30. August cohorts are still maturing (Month 1 not yet observable).

What moved July

- Personal daily notifications naming the user's last track; an in-app daily drop screen.
- The creator feed and reel rewards launched; reels posted grew 4× in August.
- Email programme (product news, "your track is ready", feature launches) — 72% of one late-August creator wave had received the previous week's email.

What ships next (retention roadmap)

- One-tap release to Spotify & other DSPs — a reason to come back for stats, and a status marker for creators.
- Collaborative loops: duets in your own voice, remix chains, genre rooms in the feed.
- Streaks and a metered free daily credit tied to notifications (tested in July; being redesigned around the feed rather than the generator).

Generative music is compounding at ~29% a year, and the category's leaders are being valued in the billions.

Market

- Generative AI in music: **$294M (2023) → $3.6B (2033)**, 28.6% CAGR (Market.us, Sep 2024).
- The wider prize is participation, not tooling: the same people who stream music now want to make it. Short-video platforms proved that consumer creation scales to hundreds of millions when the tool is a phone.
- Distribution economics changed in 2025–26: the largest generators signed licensing deals with major labels (Warner, Universal and BMG each licensed a leading generator in 2025–26), turning legal risk into a sanctioned market.

Where Octa sits

Today's leading generators (Udio, Producer.ai and the category leader) are desktop-first creation tools for prosumers. Octa is the **consumer layer**: mobile-first, voice-first (clone and sing), social by default (a feed, not a file list), and headed for one-tap release — closer to what CapCut did for video than to a DAW.

Comparable financings

COMPANY	ROUNDS (PUBLIC)	BACKERS
Category leader (US, founded 2022)	$125M Series B (May 2024); $250M Series C at $2.45B (Nov 2025); $400M+ Series D at $5.4B (Jun 2026)	Lightspeed, Matrix, Founder Collective, Menlo Ventures and others
Udio	$8.5M + $10M seed (2024)	a16z; will.i.am, Common, Tay Keith, Mike Krieger, UnitedMasters
Riffusion / Producer.ai	$4M seed (Oct 2023)	venture + angels
Splice	$150M+ total; ≈$500M valuation (Series D, 2021)	USV, True Ventures, DFJ, Goldman Sachs; angels incl. Scooter Braun, Tiësto
Endel	Seed + $5M Series A (2020)	Amazon Alexa Fund, Warner Music, Kima, Techstars Music; artist angels

Sources: company blogs and press releases; Wikipedia entries for Udio, Riffusion, Splice, Endel. Figures as publicly reported; not independently audited.

An orchestration company with a growing proprietary model layer — not a thin wrapper.

Octa's generation backbone runs on licensed, best-in-class foundation-model capacity and is deliberately model-agnostic: the engine behind a request can be swapped or blended without touching the product. The defensible work sits in the layers around it — the parts that decide whether a consumer gets a finished song in one tap, in their voice, at 99.8% reliability and six cents of cost.

Proprietary components in production

- **Generation reliability layer** — retries, provider-failure recovery, media permanence (own storage), honest refunds. 99.8% completion.
- **OctaTune** — in-house vocal pitch-correction model family (v10 line) trained on licensed datasets; the basis for the studio's tuning tools. ≈₺220K of founder capital has gone into training runs to date — the team has already trained and shipped its own models.
- **My Voice pipeline** — capture, validation, persona lifecycle guarding (voices are monitored and re-validated automatically).
- **Nova** — the conversational generator brain: multilingual intent layer, slot harvesting, source-selection logic for covers/extends, speech in the user's language.
- **GPU video renderer** — lyric videos and reels rendered on serverless GPUs; the visual identity (the "ring") is a native shader.
- **Taxonomy & feed** — genre tagger, genre rooms, reward logic, abuse guards.
- **Commerce spine** — Play RTDN + web checkout unified into one entitlement ledger; support assistant in 10 languages.

Stack

Android: Kotlin / Jetpack Compose / AGSL shaders. Web: vanilla JS + WebGL, edge-deployed. Backend: Python (FastAPI) on EU cloud, Postgres with row-level security, object storage + CDN, serverless GPU for rendering, push (FCM) and transactional email.

Model strategy

Foundation capacity is bought per generation and treated as a commodity input with multiple qualified suppliers. Margin and differentiation compound in the proprietary layers above (voice, tuning, video, feed). Detailed vendor terms, dependencies and mitigations are covered in the data room and under Risks (§16).

> **Cost to serve:** ≈$0.06 per song today; infrastructure spend is usage-linked and currently in the hundreds of dollars per month.

From "make a song" to "be an artist": release, collaborate, return.

Q4 2026

- One-tap release to Spotify, Apple Music and other DSPs (aggregator integration selected; UI shipped as "coming soon").
- Web studio growth loop: shareable song pages, SEO surfaces, web-only paywall experiments.
- Retention mechanics rebuilt around the feed (genre rooms, duets, remix chains).

Q1 2027

- iOS app (Compose Multiplatform / native), lifting the addressable market on the high-ARPU platform.
- ANIMA — a talking, singing on-screen persona built on the voice pipeline (spec complete).
- Creator monetisation: tips, paid downloads, split royalties on released tracks.

Always on

- Model layer: OctaTune v11 line, multilingual voice quality, cost per song trending down; first in-house generation-model experiments once revenue covers sustained GPU spend.
- Purchase-optimised acquisition scaled within measured ROAS bounds; creator partnerships.
- Localisation beyond the current 7 UI languages.

Milestones this round should reach: 10K+ monthly creators, Day-7 return above 15%, ≥$10K MRR with web + iOS live, and a released-track catalogue on DSPs — the evidence base for a seed round.

A musician who became an engineer, and a six-person team that ships weekly.

Salih Acun — Founder & CEO

Musician first. Studied Music at Istanbul Bilgi University (Faculty of Humanities) and left to open his own recording studio; later completed an MSc in Software Engineering at the same university. Octa is the studio he wanted as a musician, built with an engineer's hands: he leads product, the Android app and the backend.

Team of six

- **3 AI engineers** — generation orchestration, voice pipeline, OctaTune model line
- **1 data engineer** — analytics, reconciliation, growth measurement
- **1 frontend designer** — app and web studio visual language
- **Founder** — software engineering, product, infrastructure

Fully remote and active on the product every day. Of the ≈₺600K spent to date, ≈₺380K went to the team and operations and ≈₺220K to training Octa's own models.

Full bios and profiles of all team members are in the data room.

Company facts

Legal form	Octa is operated by its founder as a sole proprietorship in Türkiye. A joint-stock company (Anonim Şirket, A.Ş.) will be incorporated to close this round — the standard structure for Turkish startups at their first outside investment, and the vehicle that makes licensed angels (BKY) eligible for the tax deduction. Registration and tax details available on request.
Founded	2025 · first paying customers October 2025 · web studio September 2026
Base	Türkiye · serving a global, English-first audience
Capital to date	≈₺600K of founder capital — ≈₺220K of it spent on training Octa's own models, the rest on team and operating costs. No outside capital raised.
Cap table	100% founder-owned; no prior investors, notes or SAFEs.
IP	Codebase, trained models (OctaTune), brand and domains held by the founder; assigned to the company at incorporation.

Pre-seed to turn proven intent into a habit, and a phone into a stage.

Raising $200K (≈₺8M) on a post-money SAFE at a $2.0M valuation cap — or the equivalent convertible instrument under Turkish law once the A.Ş. is incorporated. Target close: Q4 2026 · runway: 12–15 months · minimum ticket $10K · lead/anchor angel open · rolling close from the first $75K. **Contact: investors@octaverum.com**

Use of funds (illustrative, 12–15 months)

Growth — purchase-optimised acquisition, creator programmes, launch of release-to-DSP	**40%**
Product & ML — retention loops, iOS, voice/tuning model line	**35%**
Infrastructure & model capacity — scales with usage	**15%**
Operations, legal, licensing	**10%**

What an angel gets

- Entry into a category whose leaders re-priced 2× in seven months (the category leader: $2.45B → $5.4B), at the consumer layer those leaders do not occupy.
- A team with demonstrated cost discipline: the current traction was bought with tens of thousands of lira, not millions of dollars.
- A clean cap table: 100% founder-owned, no prior notes or SAFEs — first money in.
- A data-transparent company: this book's numbers are reproducible from the production database and Google Play Console; full data room available.
- For Türkiye-licensed angels (BKY): the individual-participation tax deduction applies once the A.Ş. is incorporated at closing.

Ideal partners: operators from music, creator platforms or mobile subscription businesses; angels who back product-led founders early and open doors to labels, DSPs and growth talent.

What could go wrong, and what is already in place.

RISK	REALITY TODAY	MITIGATION
Early retention	Day-1 return ~5–7%; month-1 return 11–21% in recent cohorts.	Feed, release-to-DSP and collaboration loops; weekly cohort readouts; this is the explicit focus of the round.
Dependence on third-party model capacity	Core audio generation is licensed capacity; a provider incident in Aug 2026 was absorbed with zero lost customer tracks.	Model-agnostic engine, media permanence layer, automatic recovery, multiple qualified suppliers; proprietary layers (voice, tuning, video) grow margin and independence.
Platform policy (Google Play)	Two 2026 notices, both resolved within days; vitals far under thresholds.	Server-verified purchases, conservative content filters, web channel as a second front door.
Music rights & content	Industry moved to licensed models in 2025–26; Octa generates original works and voice clones only from the user's own recordings.	Provider-level licensing, artist-name and copyright filters, takedown process, consent-based voice cloning.
Founder concentration	Six-person team; the founder owns product, the Android app and the backend; weekly releases.	Documented systems, automated reconciliation and monitoring; incorporation with a planned employee option pool; first senior hires funded by the round.
Revenue concentration by platform	Play is the only paid channel until Sep 2026.	Web checkout live (Sep 2026); iOS in 2027.

Every number here can be re-run.

Definitions

- **Account**: an authenticated account that has signed in at least once; internal and test accounts are excluded. Total: 1,249.
- **Song**: a generation that completed successfully (status = completed) for an account.
- **Creator**: an account with ≥1 completed song in the period.
- **Paid**: any non-free subscription row or track-pack purchase on an account; "active" = active status with an unexpired Play-verified expiry.
- **Retention**: activity-based (create, post, like, comment, DM, radio) relative to signup timestamp; cohorts by signup month.

Sources & dates

- Production database export, 2026-09-01 12:34 (UTC).
- Google Play Console: Dashboard, Statistics, Android vitals, Ratings, Subscriptions, Revenue — read 1 September 2026 (28-day windows ending 31 Aug).
- Google Ads account reports, 26 Jul – 24 Aug 2026 and 1 Jun – 23 Aug 2026.
- Market and comparables: Market.us (Sep 2024), company press releases, Wikipedia (Udio, Riffusion, Splice, Endel); RevenueCat *State of Subscription Apps 2025* for benchmarks; Android developer documentation for vitals thresholds.

Data room index (available on request)

- Metrics notebook + SQL for every chart in this book
- Google Play Console read access (statistics, vitals, finance)
- Monthly P&L and cost ledger (infrastructure, model capacity, ads)
- Product demo accounts (Android + web) and release history
- Architecture overview, security posture (RLS, purchase verification), incident log
- Model/provider agreements and licensing summary
- Registration and tax details, cap table, IP assignment at incorporation

Currency

Google Play reports in Turkish lira (₺). Dollar equivalents are approximate at ≈₺41 per $ and marked with "≈".

Prepared 1 September 2026 by the Octa team · investors@octaverum.com. Forward-looking statements are plans, not guarantees.