Financial Summary

PES Global Group Investment Overview

$2-3M	$35-70M	25%	7-10×
Current Revenue	Year 3 Target	Gross Margin	Exit Multiple Target

01 Executive Financial Summary

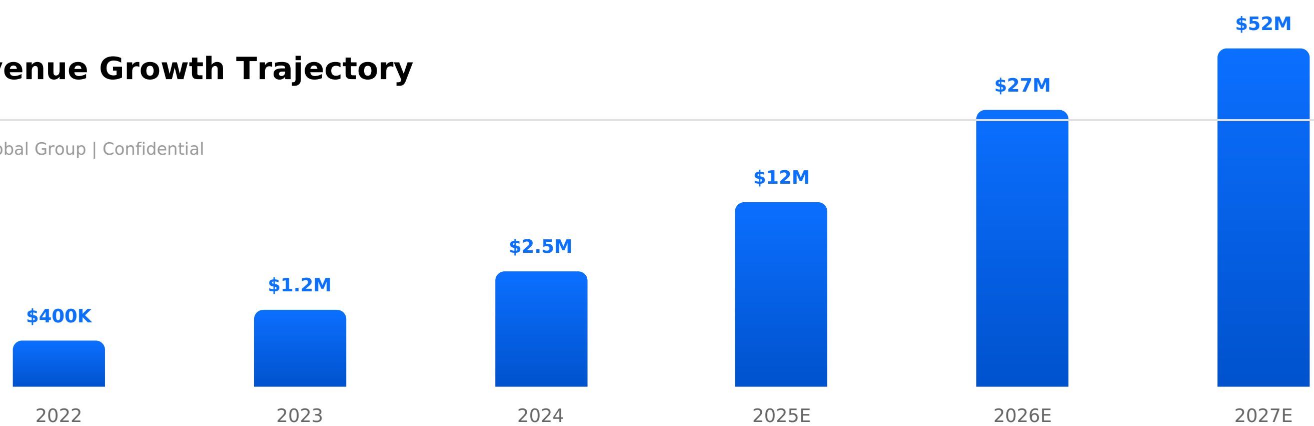
$2-3M
2024 Revenue

$10-15M
2025 Target

$20-35M
2026 Target

$35-70M
2027 Target

Revenue Growth Trajectory



Key Financial Metrics

Gross Margin	25%

02 Revenue Model & Unit Economics

Revenue Streams

PES Supply

Primary: Distribution & Project Sales (25% GM)

Portlandia Logistics

Freight Brokerage (70% Commission)

Big Sky Dynamics

SaaS Licensing ($3K/mo MRR)

PowerLink Network

Lead Generation (100K+ Contractors)

Unit Economics

Metric	Value
Average Project Size	$25,000-$150,000
Gross Margin (Distribution)	25%
Freight Commission	70%
MSP Margin	1,100%
Email Open Rate	75%+

03 Cost Structure & Operational Efficiency

Global Team Cost Advantage

Team Location	Headcount	Monthly Cost
United States (Key Personnel)	4-6	Variable
Pakistan (Operations)	25-30	$8,500
India (Technical)	8-10	$4,010
Total International	**39-40**	**$12,510**

90%+ Labor Cost Savings

Equivalent US-based team would cost $150K-200K/month. International operations deliver same capabilities at $12,510/month.

Operating Cost Breakdown

International Payroll $12,510/mo

Technology Stack (Odoo/Azure) $3,500/mo

US Operations $15,000/mo

Warehouse (Louisville) $4,500/mo

~$35,500

Monthly Operating Burn Rate

04 Tax Optimization & SEZ Structure

4.5%

Target Effective Tax Rate

$475K+

Annual Tax Savings

10 Years

SEZ Tax Holiday

Multi-Jurisdiction Strategy

Jurisdiction	Entity Type	Tax Rate
Wyoming (HoldCo)	C-Corp	0% State
Puerto Rico (Act 60)	Export Services	4%
Pakistan (SEZ)	Operations	0% (10yr)
India (SEZ)	Technical	0% (10yr)
Kentucky (OpCo)	LLC	5%

Tax Savings Model

Traditional Structure

Standard US C-Corp: 21% Federal + State = ~25-27% effective rate on $2M profit = **$500K-540K** tax liability

05 Three-Year Financial Projections

Conservative

$35M

Year 3 Revenue

Y1	$10M
Y2	$20M
Y3	$35M

Base Case

$52M

Year 3 Revenue

Y1	$12M
Y2	$27M
Y3	$52M

Upside

$70M

Year 3 Revenue

Y1	$15M
Y2	$35M

06 Revenue Growth Drivers

Organic Growth Levers

10M SKU Catalog Initiative

Transform from 3,800 manual SKUs to 10M automated. Increases addressable market 2,600× while reducing labor cost per SKU by 95%.

Category Expansion

Generators (Cummins Feb 2025), HVAC systems, wind power. Each category adds $5-15M TAM.

Geographic Expansion

Caribbean markets ($0.30-0.50/kWh electricity costs), Latin America, expanded USMCA coverage.

Acquisition Strategy (Sonepar Model)

Year	Targets	Added Rev	Multiple
Year 1	2-3	$5-8M	4-6×
Year 2	3-4	$8-12M	4-6×
Year 3	4-5	$12-18M	5-7×
Years 4-7	25-30	$75-100M	5-8×

40+ Targets

Total Acquisition Pipeline (7-Year Horizon)

07 Valuation Thesis: Platform Premium

Traditional Distributor

3-5×

EBITDA Multiple

- Inventory-heavy model
- Regional customer base
- Manual operations
- Limited scalability
- Relationship-dependent

AI-Enabled Platform

7-10×

EBITDA Multiple

- Asset-light distribution
- USMCA + Caribbean coverage
- 95% automated operations
- 10M SKU platform scale
- Technology moat + network effects

Platform Value Creation Formula

$18M EBITDA × 8× Multiple = $144M Enterprise Value

vs. Traditional: $18M × 4× = $72M

Platform Premium: +$72M (100% value uplift)

08 Capital Efficiency & Investment Returns

Capital Deployment

Investment Area	Amount	ROI
10M SKU Platform (Big Sky)	$1.8-2M	50-100×
Acquisition Capital (Y1)	$2-5M	2-3× IRR
Working Capital	$1-2M	25%+ GM
Technology Infrastructure	$500K	Enabling
Total Initial Capital	**$5-10M**	**30%+ IRR**

Return Analysis

30-50%

Target IRR (7-Year)

10-20×

MOIC Target

Comparable Exits

Sonepar model: Built $14.3B platform through 500+ acquisitions. PES targets regional market leadership with same playbook, tech-enhanced execution.

09 Risk Factors & Mitigations

Risk Category	Description	Mitigation Strategy
Execution Risk	10M SKU target ambitious; requires Big Sky Agentics delivery	Phased rollout: 25K SKUs/day target → 14 months to goal. Proven AI team with 2 clients already delivering.
Market Risk	Solar/clean energy policy changes (IRA reduction)	Category diversification (generators, HVAC, EV). 5+ product lines reduces single-category dependency.
Integration Risk	Acquisition integration complexity at scale	12-18 month brand transition model. 3-year partnership buyout approach validates fit before full integration.
Competitive Risk	Large distributors (Sonepar, WESCO) could enter space	Technology moat (AI catalog), relationship depth (229 Tier 1s), agility advantage. Too small to be on radar currently.
Key Person Risk	Dependency on founding team	Building management depth via COO/CFO hires. International team provides operational continuity.
Regulatory Risk	SEZ tax benefits could change	10-year locked holidays. Diversified jurisdiction strategy (Wyoming/PR/Pakistan/India).

10 Key Financial Milestones

Q1 2025	Q2 2025	Q4 2025	Q4 2026	2028-30
$3M Run Rate	$5M Run Rate	$12M Annual	10M SKUs	PE Exit
Cummins Launch	First Acquisition	2-3 Acquisitions	Platform Complete	7-10× Multiple

2025 Targets

- Revenue: $10-15M
- Complete 2-3 acquisitions
- Launch Cummins generator line
- 25,000 SKUs/day processing
- HVAC category entry

2026 Targets

- Revenue: $20-35M
- Complete 3-4 additional acquisitions
- 10M SKU milestone (Dec 31)
- Private label product launch (Q3)
- Caribbean market expansion

Investment Inquiry

PES Global Group Financial Summary

For detailed financial information and data room access:

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$35-70M	**7-10×**	**30%+**
Y3 Revenue Target	Exit Multiple	Target IRR