

Reveal the chemistry of human potential

Talemistry: the decision-ready hiring workflow for growing tech teams worldwide

Investor overview · Talemistry by Nomado Innovations

Hiring teams drown in applications and coordination

300+ applications per hire, sustained through 2025

45% of surveyed US candidates reported employer ghosting

Recurring cost: scheduling delays, repeated data entry, late scorecards





Our answer

One case from application to a documented human decision

Candidate status, interview coordination, structured scorecards and an evidence trail in one paid bundle.

Candidates use it free; employers pay for the workflow.

A clear next step for every candidate and evidence behind every decision.

A full-cycle AI recruitment ecosystem, with humans in charge

Seven stages

Discover → | Attract → | Understand → | Match → | Evaluate → | Decide → | Offer

Talemistry Profile and Candidate Formula

Evidence-based view of each candidate's Talent Elements

Team Chemistry

How a candidate may fit the way a team works

Candidate experience

24/7 status assistant and interview self-scheduling

Responsible AI

Explainable insights that people review, challenge and override

talemistry.com

Part 1

Market

A global market, starting with an EU beachhead of ~272,000 firms

~272,000

Eurostat: 34m EU enterprises in 2024, 0.8% medium-sized

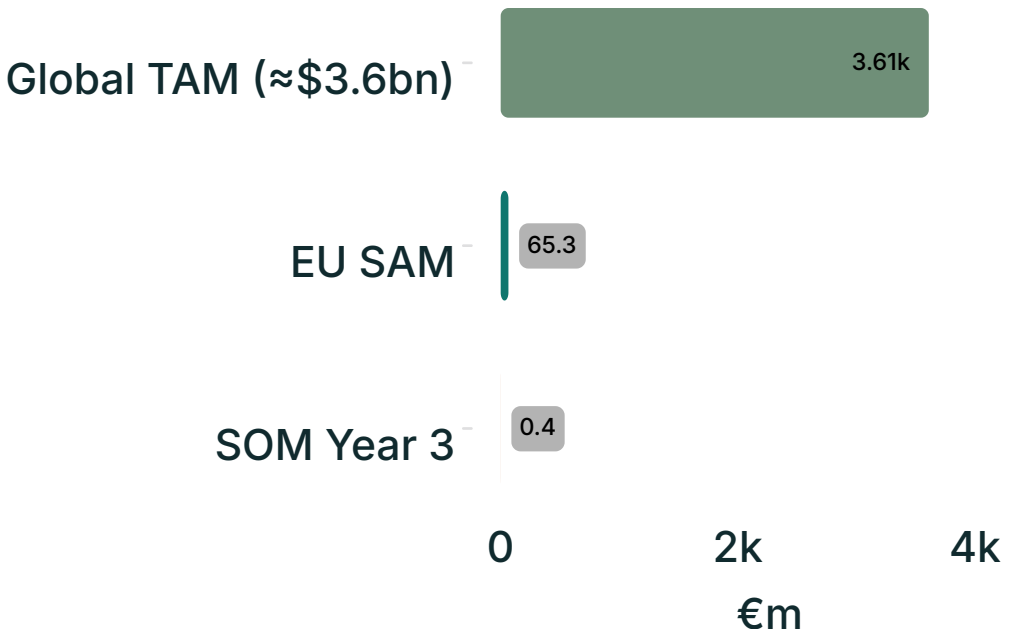
Target: tech and professional-services firms with 50–249 staff doing recurring technical hiring.

Entry: Greece and Bulgaria relationships, then the wider EU.

Expansion (plan): EU first, then UK and North America, then APAC.



Global TAM ≈ $3.6bn, EU SAM €65.3m, SOM €396k by Year 3



Global TAM

Global recruitment software: USD 3.61bn in 2025, USD 3.77bn in 2026, USD 5.5bn by 2031 (7.85% CAGR). North America is largest; Asia-Pacific fastest-growing.

EU SAM (initial beachhead, base)

272,000 EU firms × 25% sector fit × 40% recurring hiring and reach = 27,200 firms / €65.28m

SOM

150 paying firms × €220 monthly ARPA × 12 = €396,000 run rate (0.55% of SAM)

Sources: Mordor Intelligence; Fortune Business Insights (cross-check: USD 3.41bn in 2025). Chart in millions (TAM USD, SAM/SOM EUR). SAM and SOM are planning assumptions.

SAM sensitivity: €24m to €114m

Scenario	Sector fit	Hiring and reach	Firms	SAM
Low	15%	25%	10,200	€24.48m
Base	25%	40%	27,200	**€65.28m**
High	35%	50%	47,600	€114.24m

Filter percentages are planning assumptions applied to ~272,000 firms.

Module upside within the same customers

Module	Eligible firms	Extra spend/yr	Potential
Job distribution	10,880	€240	€2.61m
Scheduling and updates	21,760	€180	**€3.92m**
Video workflow	8,160	€360	€2.94m
Technical assessments	5,440	€600	€3.26m
Validated psychometrics	2,720	€300	€0.82m

Illustrative and overlapping: not added to TAM.

Competitors sell breadth; we win on focus

Alternative	Public price signal	Implication
Workable	$299/mo, 1–20 staff	Scheduling and scorecards are expected
Ashby	$400/mo, up to 100 staff	Win on onboarding and service
Recruitee	Configurable	Collaboration isn't unique
Calendly	$10/seat/mo	Standalone scheduling has little pricing power
TestGorilla	From $215/mo	Partner, don't build a test library
CoderPad	€80/mo	Use specialist depth for engineering

Part 2

Business model

Organizations pay; candidates stay free

Plan	Price	Scope	
Candidate	Free	Apply, status, scheduling, correction	
Starter	€49/mo	1 role, 2 seats, 250 records	
Team	**€199/mo**	5 roles, 5 seats, 2,000 records, analytics	
Agency pilot	€499/mo	10 roles, 10 seats, 5 client workspaces	
	Onboarding	€250–€750	One-off migration and setup

Plus metered usage credits (e.g. €0.50 AI summary, €2 transcript notes) and disclosed partner referrals.

Prices are experiments to test.

Unit economics: 80% margin, 5.1-month payback

€220

monthly revenue per Team customer (€199 + €21 usage)

€176

gross profit after €44 direct cost

5.1 mo

to pay back €900 fully loaded acquisition cost

€7,040

simplified lifetime gross profit at 2.5% monthly churn (€3,520 at 5%)

≈ 57

customers to break even on €10k monthly fixed cost

Low-cost growth loop

1. Free role kits and scorecards solve a task before a purchase
2. Employers publish a response promise
3. Candidate status pages deliver it during real hiring
4. Measured results become partner content

≤€300 cash per month; paid ads only after retention is proven.



Part 3

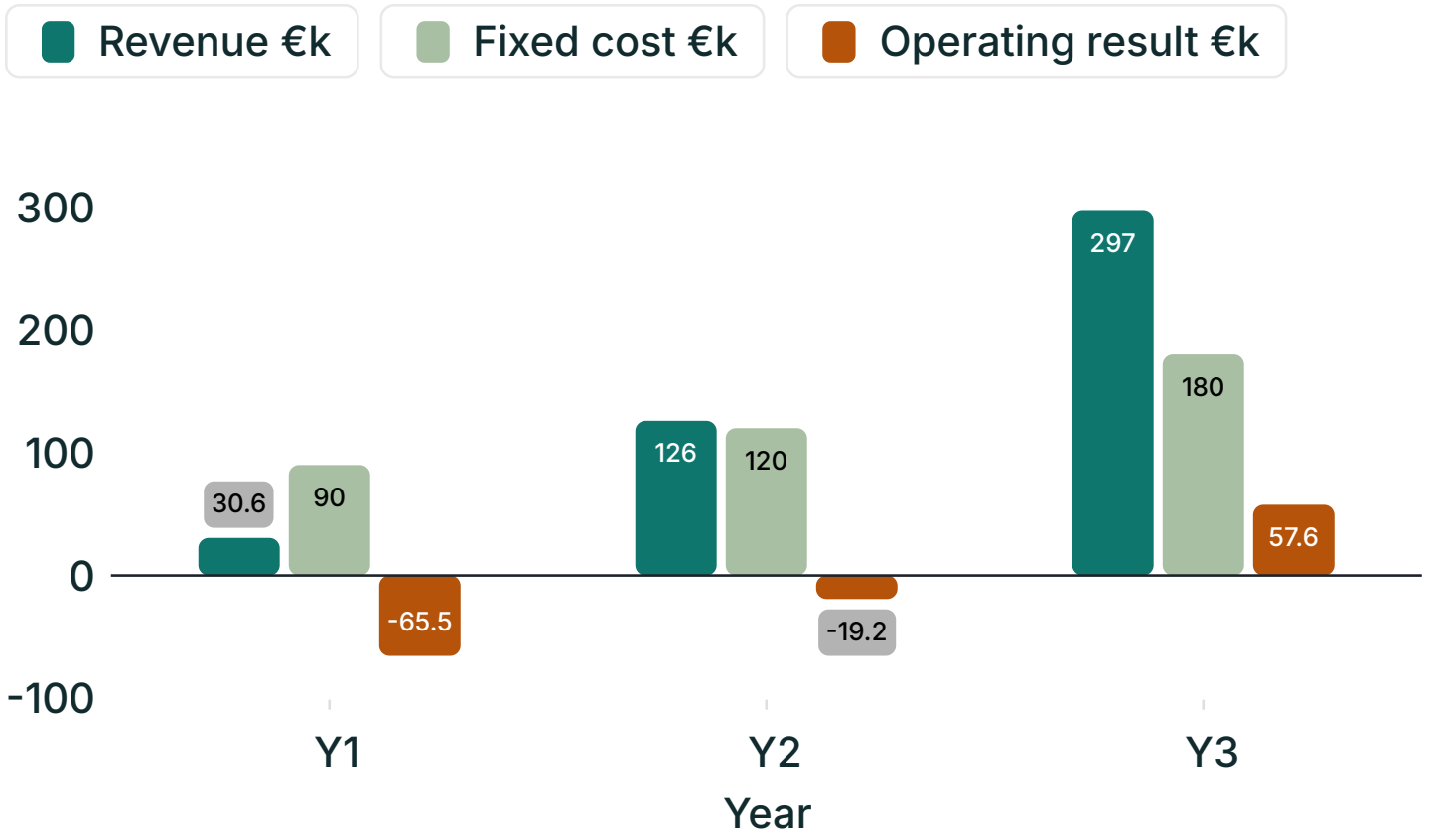
Financials

Base case: 150 customers and €396k ARR by Year 3

	Year 1	Year 2	Year 3
Closing customers	30	75	150
ARPA / month	€170	€200	€220
Revenue	€30,600	€126,000	€297,000
Gross profit	€24,480	€100,800	€237,600
Fixed operating budget	€90,000	€120,000	€180,000
Operating result	−€65,520	−€19,200	**€57,600**
Closing ARR	€61,200	€180,000	**€396,000**

Illustrative lean base case, years counted from paid launch.

Profitable in Year 3 of the base case

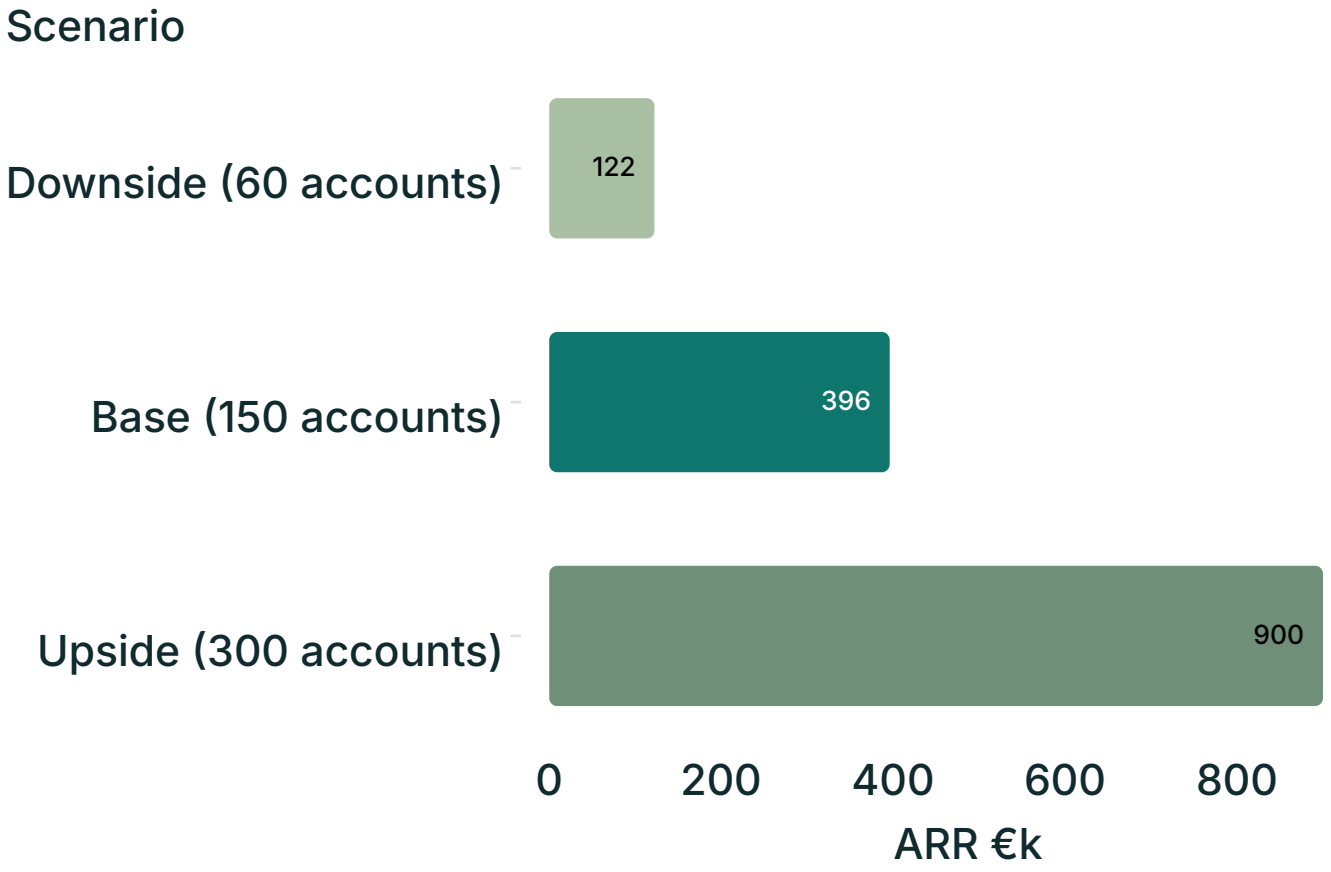


€57.6k

operating result in Year 3, as revenue overtakes fixed costs

Illustrative base case.

Year 3 scenarios: €122k to €900k ARR



The upside case is more than double the base.

ARPA €170 / €220 / €250 per month.

Illustrative scenarios.

Valuation estimate: €2–4m on base Year 3 ARR (illustrative)

Method: forward ARR multiple, the usual approach for early B2B SaaS. Assumed 5–10× multiple (illustrative, not a market quote).

Downside · €122k ARR

€0.6–1.2m

(illustrative)

Base · €396k ARR

€2.0–4.0m

(illustrative)

Upside · €900k ARR

€4.5–9.0m

(illustrative)

Today's value depends on pilot traction; no customer traction is claimed yet.



The ask

~€88k

to fund the path to break-even

Covers

The Year 1 loss plus a 3-month €7.5k operating buffer

Staged

€3k–€8k readiness review, then a €25k–€45k 12-week pilot

Stop gates

5 paid pilots, 3 of 5 renewing, payback under 12 months

Milestones that de-risk the next round

Day 30

Verified feature inventory, 200-account prospect list, 5 paid pilot commitments

Month 3

3 of 5 pilots renew at the agreed price

Month 6

Repeat role usage, direct margin above 70%

Month 12

30 active accounts

Milestones are planned targets, not achieved traction.