HAWAII'S FIRST MULTI-VERTICAL SPACE ECONOMY

Motion (dba StackHQ) — a Native Hawaiian co-founded MBE opening Kalihi's first civilian auto repair bay rental facility, with a trading floor co-working and a private gym sequenced on the same warehouse footprint. One roof, three documented pricing gaps, shared overhead base.

$190K–$240K

EQUITY RAISE

~$26K/mo

AUTO-REPAIR BREAKEVEN

Native Hawaiian MBE

CO-FOUNDED · KALIHI, OAHU

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PROBLEM

Three underserved professional-space markets in Honolulu. Zero civilian competitors in the lead category.

Each vertical sits in a documented pricing gap or supply gap. The lead vertical — civilian auto repair bay rental — has **zero** competitors on Oahu.

Open with the lead category (auto repair) — it's the most asymmetric and the strongest "why now" hook for screening committee members who already know the local market.

— **Auto repair — Reddit & Yelp:** r/hawaii threads asking for a garage to rent go unanswered because no civilian option exists. Honolulu shop wait times run 2–3 weeks; "called 10 shops, all booked" is the most common complaint in summer and holidays.

- **Auto repair — supply-side:** the only comparable facility on Oahu is Schofield Barracks Auto Skills Center (30 professional-grade bays, lifts, diagnostics) — permanently **military-only**, never accessible to civilians.
- **Gym — pricing gap:** Kalihi gym pricing tiers jump from $55/mo (Ka 'Ono) to $120/mo+ (anyaka) with no $60–100/mo mid-market option. No dedicated powerlifting facility within 10 minutes — Pacific Islander strength culture underserved.
- **Trading — supply gap:** no dedicated trading-floor co-working in Hawaii; retired mainland traders, Asia-Pacific remote workers, and Hawaii-born returners all lack a multi-monitor, pre-market-ready workspace.

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SOLUTION

One warehouse. Three verticals. Sequential build.

Open auto repair first (Phase 1 — the lead). Trigger trading floor at $20K/mo. Open gym at $26K/mo. Shared lease, shared utilities, shared ops.

Frame as "stacked, gated, and self-funding" — each vertical only opens when the prior one is profitable. No cash burn across verticals.

- **Phase 1 — Auto Repair (lead vertical, this raise):** ~2,500 sqft Kalihi warehouse with 2–4 professional-grade bays. Hourly ($55–$95) and Pro Monthly ($550) pricing. Open at month 3 from a held ground lease.
- **Phase 2 — Trading Floor (triggered at $20K/mo sustained):** 6 dedicated desks + livestream room, pre-market access from 3:30 AM HST, internet redundancy. Cashes the same warehouse footprint.
- **Phase 3 — Private Gym (triggered at $26K/mo sustained):** mid-market boutique ($60–$100/mo) in Kalihi. Shift-worker hours serve the population that big chains ignore.
- **One roof, three revenue lines:** shared rent (~$6.5K/mo all-in), shared utilities, shared 1 FTE ops base. No incremental burn as new verticals layer in.

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MARKET & VERTICALS

Each vertical sits in a documented pricing gap.

Pricing calibrated to mainland comparables + Hawaii's 25–40% cost premium. Pro Unlimited benchmarked to mobile-mechanic income potential at $150/hr billing.

AUTO REPAIR — BAY RENTAL

$55-$95/hr

Pro Unlimited $550/mo · mobilize any mobile tech billing $150/hr

GYM — MID-MARKET TIER

$60-$100/mo

Bridges $55 chain and $120 boutique — Kalihi gap

TRADING — DEDICATED DESK

$400-$900/mo

Hot desk, dedicated desk, private pod

— **Hawaii indie mechanic labor:** $135–$150/hr billed to customer — a $75/hr bay lets a mobile tech double their effective margin.

— **Trading floor demand:** pricing gap exists for any user on US equity schedules in HST (3:30 AM pre-market is the singular underserved window, no competition).

— **Kalihi gym cluster:** 24-Hour Fitness chains at $55/mo are overcrowded; boutique at $120+ leaves the working-class gap wide open.

— **Market capture proof:** landing pages live at /repair, /trading, /gym all with waitlists wired to Neon DB — real demand, not modeled demand.

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WHY NOW

The capital stack is open — and the waitlist is already capturing leads.

HCL MBE loan progressed in parallel (this is the equity layer, not the debt layer). Waitlists are live across all three verticals. SEO is indexing the category on the long tail.

This is "why us / why now." Hawaii Angels sees 500+ decks a year — capital-stack discipline is what separates this one.

— **Parallel capital-stack progress:** HCL MBE loan inquiry is in concurrent screening with this raise — debt layer on Motion, equity layer on Hawaii Angels. Stacked, not competing.

— **Waitlist live:** /repair, /trading, /gym forms wired to the `waitlist` table on Neon. Demand captured in real time, not projected from a model.

— **SEO indexing:** three blog articles live (auto repair bay rental Honolulu, stock market hours Hawaii, private gym Honolulu) with JSON-LD schema and sitemap entries — first-mover position on the long-tail queries.

— **No supplier lock-in:** equipment financing is separate ($90K @ 8.5% over 60 months, $1,865/mo) and self-funds from bay revenue — this raise is the operating + lease + build-out layer, not a hardware raise.

— **Trigger discipline:** Phase 2 and Phase 3 only open on sustained-revenue triggers. No speculative build-out. Capital stack stays clean.

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BUSINESS MODEL

Hourly + Pro Monthly + multi-vertical cross-sell.

Pro Monthly is the self-funding anchor — it converts any mobile tech billing $150/hr into a $550/mo member. Hourly fills capacity at the margin. Cross-sell layers as verticals open.

REVENUE STREAM A

Pro Monthly $550

Self-funding for any mobile tech billing $150/hr. Predictable, recurring, sticky.

REVENUE STREAM B

$55–$95/hr

Hourly bay rental fills capacity, attracts project / DIY / non-recurring users.

— **Pro Monthly economics:** at $550/mo × ~40 active Pro members + hourly fills, the lead vertical runs margin-positive from month 6 — no draw on remaining capital after M8.

— **Hourly pricing spread:** Diagnostic $55, Full-Service $75, Heavy-Duty/Alignment $95 — three tiers cover mobile techs, installers, project-car owners, and diesel shops.

— **Cross-sell engine:** every trading-floor and gym member who opens Phase 2 / Phase 3 is also a potential Pro Monthly bay user. Customer base compounds across verticals.

— **No CAC bloat:** car-club and r/hawaii outreach channels are zero-cost; waitlist SEO compounds with no ad spend required.

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FINANCIALS

Auto repair alone hits ~$26K/mo by M6. All-three-verticals steady state: $38K/mo / $458K ARR.

OpEx stack: rent ~$6.5K + utilities ~$1.5K + 1 FTE ops ~$4K + marketing ~$1K + misc ~$0.5K = ~$13K/mo before revenue. Auto repair ramps to **~$26K/mo** by month 6 and self-funds thereafter.

MONTH	MONTHLY REVENUE	MONTHLY OPEX	NET	NOTES
M0 (Raise)	—	—	**+Raise**	Capital deployed
M3	**$7.5K**	**$13K**	−$5.5K	Bay ops ramp
M6	**$26K**	**$13.5K**	**+$12.5K**	Auto repair self-funded
M8 — Break-Even	**$26K+**	**$14K**	**+$12K+**	No draw on remaining capital
M12 (Trading opens)	**$32K**	**$15K**	+$17K	Phase 2 stacked
M18 (Gym opens)	**$38.2K**	**$16K**	+$22.2K	Full stack active

— **Auto repair lead at $26K/mo:** conservative ramp — 4 bays at 60% utilization in Year 1, scaling to 6 bays at full build-out.

— **Phase 2 + Phase 3 are pure margin:** trading floor and gym layer onto the same warehouse without additional rent, utilities, or ops base.

— **Steady-state revenue:** $38.2K/mo · $458K ARR · 80% of modeled max capacity (the conservative case).

— **Equipment debt self-funds:** the $1,865/mo equipment term loan ($90K @ 8.5% / 60 mo) is covered by ~$26K/mo Phase 1 revenue — not burden on this raise.

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ASK & USE OF FUNDS

Raising $190K–$240K to fund Phase 1 build-out + 3-month ops buffer.

Structured for Hawaii Angels equity alongside the HCL CDFI MBE debt layer. Clean equity / debt separation — this raise is the operating layer, equipment financing sits on its own term loan, HCL sits on its own facility.

EQUIPMENT **-$40K** Lifts, diagnostics, HVAC, exhaust, security	LEASE + DEPOSIT **-$33K** 12-month Kalihi warehouse, deposit + first/last	BUILD-OUT **-$26K** Bay lines, lighting, basic office, signage
OPS RESERVE **-$20K** 3-month buffer before revenue ramp	LEGAL / ACCOUNTING **-$11K** Entity, contracts, compliance, MBE paperwork	BUFFER & WORKING CAP **-$60K** Cushion above the $130K conservative floor

— **Capital stack structure:** Hawaii Angels equity (this deck) sits at the operating / build-out layer. HCL CDFI MBE debt sits at the parallel facility. Equipment is its own term loan. Three layers, no overlap.

— **Native Hawaiian MBE positioning:** Motion is co-founded by a Native Hawaiian owner operating in Kalihi — SBA 8(a) Native Hawaiian ownership classification in pursuit as part of Phase 1 launch.

— **Path to repayment / liquidity:** auto repair alone is self-funding by M6; full 3-vertical stack reaches $38K/mo / $458K ARR by M18. SBA 504 follow-on queued once DSCR clears 1.0.

— **Use of funds is opening capital, not polishing spend:** every dollar traces to a line item that opens the doors. No marketing bloat, no speculative vertical spend.