

— KINELY · MUMBAI, INDIA



# The AI operating system for fitness.

We build the software that runs the gym, the intelligence that coaches the body,  
and the game that fills the floor — three products on one brain.

• TraqGym

• FreeForm Fitness

• SquatSense

Pre-seed · 2026 · Robin Carruthers (CEO) · Amit Kumar Das (CTO) · kinely.ai

— THE PROBLEM

# Fitness is broken on both sides of the floor.



## Gyms run blind

Spreadsheets, a decade-old desktop tool, and renewal calls made from memory. Cash leaks, staff fraud goes unseen, members churn silently. In India fewer than **1% of adults** belong to a gym — and almost none of those gyms run on real software.



## Bodies train blind

No one tells you your form is wrong until it hurts. Roughly **1 in 3** lifting injuries trace to technique; ~970k weight-training ER visits a year (US). **80%** of people quit within 3 months — and online coaching can't even see them move.

Two enormous problems, one root cause: **fitness has no intelligence layer**. We're building it — for the business and for the body.

— THE COMPANY

# One AI brain. Three products. **One flywheel.**

Most fitness startups pick a lane — a gym, an app, or a device. We built the full stack, because the value compounds when they connect.

• TraqGym

## Runs the business

The AI-native, WhatsApp-first operating system for the gym. ● LIVE · 1 PAYING GYM

• FreeForm Fitness

## Coaches the body

Per-rep biomechanics from a single camera — no wearables, no hardware. ● BETA

• SquatSense

## Fills the funnel

A free, viral 30-second squat game. New members at zero acquisition cost. ● LIVE

One shared backend powers all three. Every gym we run, every rep we score, every game played makes the whole system smarter — **a data advantage that compounds as the loop turns.**

— WHY NOW

# Three curves just crossed.



## India went chat + UPI native

500M+ WhatsApp users, ~15M businesses already on WhatsApp Business, UPI the default rail. SMBs skipped websites and apps — they live in chat.



## The camera became the sensor

Pose-estimation AI matured. Tonal (\$4k) and Peloton (\$3k) proved people pay for form feedback — we deliver it on a phone they already own.



## The market is doubling

India's fitness market doubles to \$4.5B by 2030; the AI personal-trainer market goes \$16.9B → \$35.3B. Capital is funding applied AI, not models.

The tools, the rails, and the demand all arrived at once. **The window to build the operating system for fitness is open right now.**

— THE MARKET

# A doubling market, barely digitized.

- **Bottoms-up beachhead** — India has **46,500 commercial gyms**. Convert just **5–10% at ₹4,000/mo = ₹11–22 Cr (~\$1.3–2.7M) ARR** — before FreeForm, SquatSense or non-fitness verticals. Our \$1M-ARR target is a single-digit slice.
- **Why now** — a doubling, barely-digitized market: India fitness **\$1.9B → \$4.5B by 2030** (~15% CAGR), gym software **\$2.2B → \$4.0B** — still run on pen, paper & Excel (<1% adult penetration).
- **Expansion** — the same WhatsApp OS generalizes to salons, clinics & small retail — millions of appointment-and-membership SMBs beyond fitness.

**46,500+**

gym facilities in India

**<1%**

adult gym penetration (headroom, not saturation)

**12.3M → 23.3M**

members by 2030

**\$2.2B → 4.0B**

gym software market

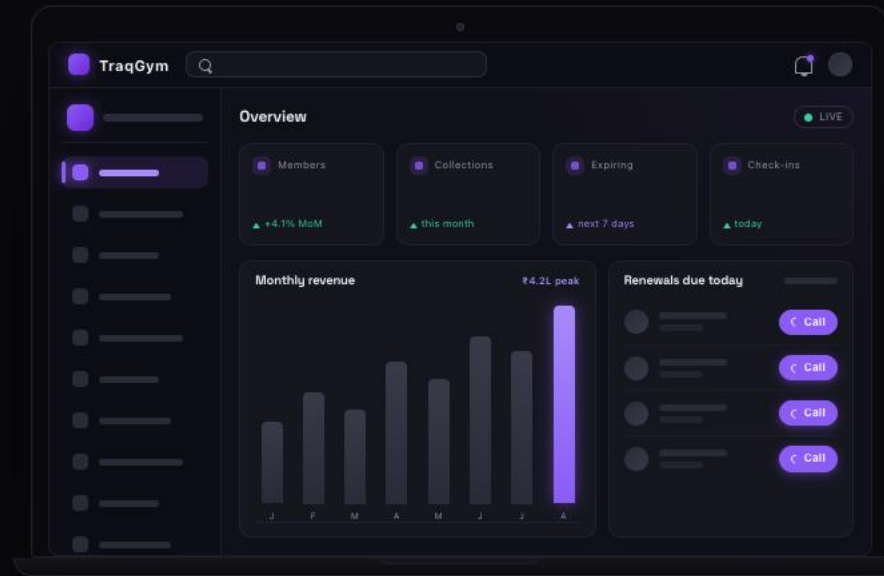
Sources: Deloitte x Health & Fitness Association (2025); ResearchAndMarkets; Mordor Intelligence.

— PRODUCT 01 · TRAQGYM ● LIVE IN PRODUCTION

# The AI-native operating system for the gym.

Everything a gym needs to run — and an AI that actually does the work.

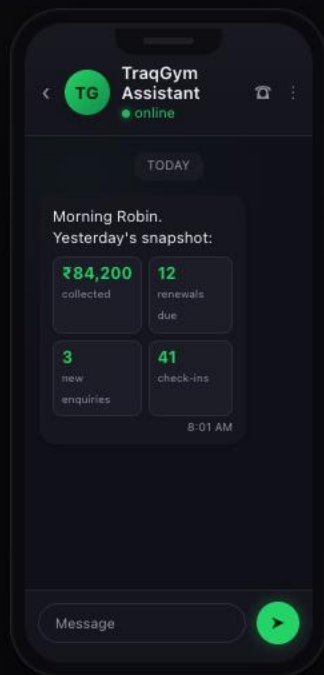
- **48 admin modules**, a 73-model data core: members, billing, attendance, PT, POS, payroll, retention CRM.
- **Built for India**: UPI QR, GST invoices, GSTR-1 + Tally exports, cash & cheque, biometric check-in.
- **White-label & per-gym isolation** — every gym gets its own brand, its own isolated data, its own AI.
- **Zero-risk switch**: paste your old software's login → your whole gym is in TraqGym tomorrow morning.



TraqGym admin — one AI-native console across 48 modules.

— THE WEDGE

# Run your gym from WhatsApp.



- **Ask anything** — in English, Hindi or Hinglish, even by voice note. "How much PT money this week?" → the real number.
- **A verified morning brief** lands every day before the owner opens a laptop — checked against the raw data, not guessed. (On chat today via Telegram; WhatsApp rolling out.)
- **14 AI agents work the night shift:** silent-churn, revenue leaks, cash-shift variance — even "is my staff stealing?"
- **It doesn't just answer — it acts.** A 214-tool agent books renewals, adds members and messages everyone. (Live in-product; rolling out to WhatsApp.)

# A 30-second game that fills the gym.

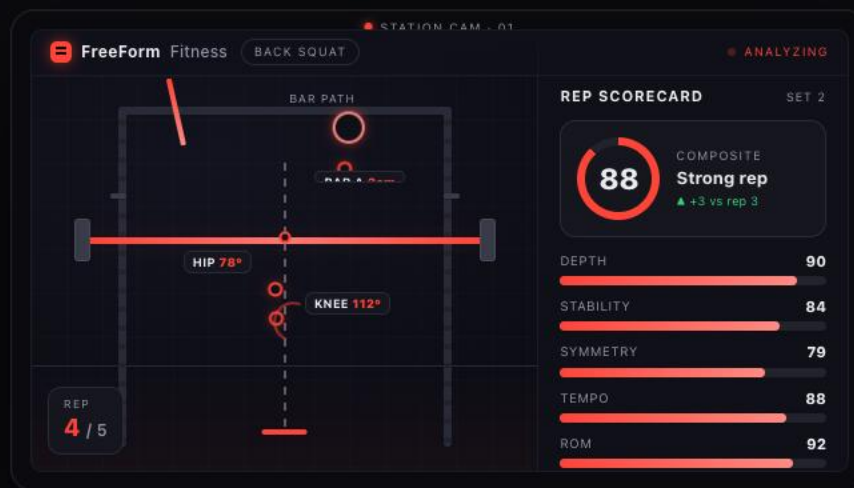
Free. Camera-only. No app, no hardware — and the leaderboard recruits the next player.



Every viral-fitness winner is gated by hardware — Zwift needs a \$1k trainer, Supernatural a headset. **We remove the gate.** Strava proved the loop without one: 180M users, IPO-filed.

— PRODUCT 03 · FREEFORM FITNESS ● INVITE-ONLY BETA

# A biomechanics lab in any camera.



Per-rep biomechanics from one camera. The form coach that never blinks.

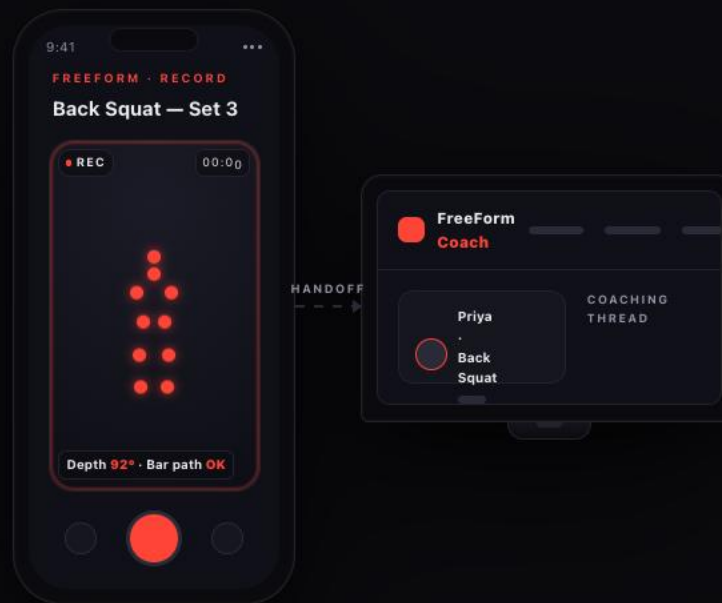
- **Per-rep scoring, 0–100** on depth, stability, symmetry, tempo & ROM — across **8 modeled exercises**, in real time.
- **It sees you fatigue** and adjusts your weights before you break — a full coaching loop, not a form checker.
- **No hardware:** what Tonal (\$4k) and Peloton (\$3k) charge a device for, we run on a phone.
- **Real strength-and-conditioning methodology, encoded** — and every rep sharpens it.

— THE FUTURE

# We solve the one thing online coaching never could: **seeing your form.**

- Members record a set; trainers coach from anywhere — with objective per-rep scores, not a blurry video squint.
- On the roadmap: camera-equipped power-rack stations that grade the gym, rank members, and auto-update the trainer.
- This unlocks the **\$28.9B → \$120B** online-fitness market — the slice every coaching platform is missing.

Not a competitor to Trainerize or Future — **the form-verification layer they all lack.** Sell to consumers, or sell into the incumbents.



— THE FLYWHEEL

# Each product makes the others inevitable.

## SquatSense fills the floor

A free game on every phone and gym TV pulls strangers in at zero cost.



## FreeForm coaches them

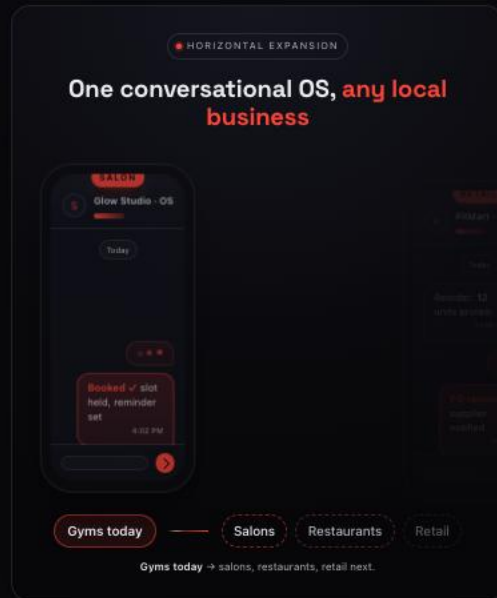
Camera biomechanics turns a curious player into a coached, retained athlete.

## TraqGym runs the gym that hosts all of it — and every rep & rupee flows into one backend

The shared data layer compounds into a movement-and-operations moat competitors can't assemble.

— THE EXPANSION

# The same OS runs **any** business on WhatsApp.



- A gym's primitives — **appointments, recurring billing, a customer roster, reminders, payments** — are a salon's, a restaurant's, a shop's.
- **63M Indian MSMEs**, most still on paper, all already on WhatsApp and UPI.
- Land in fitness (we have the proof), then become the **WhatsApp-native operating system for local business**.
- **India social commerce: ~\$2B → ~\$70B by 2030** — we own the operations layer underneath it.

— TRACTION

# We didn't model traction. **We imported it.**

**1st**

arms-length gym **already paying** — eGym Lokhandwala

**₹9.85 Cr**

of the gym's prior operating history, migrated in (11 yrs at eGym Lokhandwala)

**17,852**

payment records migrated & running in the system

**10,442**

member records under management

**3 of 3**

products built & deployed (2 live, 1 in beta)

**1**

gym live in production (eGym Lokhandwala, paying)

**Case study — eGym Lokhandwala (paying customer):** 11 years of operations — **₹9.85 Cr collected across 17,852 payment records and 10,442 member records** — migrated overnight and running live on TraqGym. [Touch it live at kinely.ai/app](#) → Our agents now run re-activation for the gym on its **7,214 lapsed members (₹3.9 Cr of lifetime spend)** — upside its old system never touched.

Migration figures are real operating data from the gym's prior system — proof the platform ingests & runs enterprise-scale gyms, **not SaaS revenue**. Live today: **1 Mumbai gym — eGym Lokhandwala, our first arms-length paying customer**. This round scales **1 paying gym → 10** (see the Strategy page).

— SHIPPED & LIVE

# The GTM machine is software now. **Click it today.**

- **Live AI console** — [kinely.ai/app](https://kinely.ai/app): real LLM answers over the real, anonymized books of our paying gym — two-tier chat: instant answers, live AI reasoning behind them.
- **Self-serve onboarding** — [traqgym.kinely.ai/start](https://traqgym.kinely.ai/start): a gym signs itself up in three steps; every signup lands as a persisted, contactable lead.
- **Billing rails wired**: Razorpay checkout (test mode) with server-side order creation and signature verification — flip to live keys at GA, nothing left to build.
- **Multi-tenant subdomains** replaced branch-per-customer deploys — provisioning gym #167 is the same one config as gym #3. Architecture published at [traqgym.kinely.ai/architecture](https://traqgym.kinely.ai/architecture).
- **Lead funnels on all three products**: FreeForm registration is open, and the B2B gym-inquiry and corporate-office forms persist every lead to the database.

**167**

gyms at ₹4,999/mo...

**~₹1 Cr**

...is the ARR equation

**6 mo**

target window after GA

**1**

paying gym today (the honest base)

This is the plan, not traction: 167 gyms × ₹4,999/mo ≈ ₹1 Cr ARR, our target within 6 months of GA — from 1 paying gym live today.

Every item above shipped and is publicly clickable — **the path from stranger → lead → onboarded gym is now software, not a hiring plan.**

— BUSINESS MODEL

# Three revenue engines, one cost base.

## TraqGym — SaaS

Per-location monthly subscription + add-ons (online payments, biometric, WhatsApp automation). 30-day trial, nightly-sync onboarding, land-and-expand into chains.

## FreeForm — B2C + B2B

Consumer app ₹499/mo (~94% gross margin) + gym licensing ₹15-40k/gym/mo, incl. camera power-rack stations and a remote-PT take rate.

## SquatSense — Growth + Events

Primarily zero-CAC acquisition; monetized via corporate-wellness challenges, gym arenas, and brand-sponsored leagues.

**90%+ software gross margins**, recurring revenue, and built-in design partners. The gym is the proof-of-concept and the data engine; the software is the business.

— WHY WE WIN

# Everyone has half. **We** have the whole.



- **Global leaders** (Mindbody, Glofox, PushPress) are powerful but wrong-railed: USD per-location pricing, card-and-app-first, no UPI, no GST, no WhatsApp ops.
- **Indian tools** (GymFito, Okfit) have the rails but no brain: WhatsApp is a blaster, not an interface — no real AI, no data isolation, no white-label.
- **The white space is ours:** AI-native operations + WhatsApp-first/no-app control + native UPI & GST + per-gym data isolation. No one combines all four at production depth.
- **And it's hard to fast-follow:** per-gym data isolation, one-click migration that locks in switchers, and a decade of S&C science — not an LLM bolted onto a legacy tool.

— TEAM

# Operator + builder. Already shipped.

## Robin Carruthers — Founder & CEO

Three decades of leadership in advertising & media, then certified as a strength-and-conditioning and sports-rehab coach (a 120→78 kg turnaround after 40). Ran our Mumbai design-partner gym, where TraqGym was built and tested on the floor — the customer empathy and domain feel behind the product.

## Amit Kumar Das — Co-founder & CTO

7+ years across Fynd (Reliance Retail), Microsoft, Jio and SAS — built Ratl.ai, Fynd's GPT-powered agentic test-automation platform, used across Reliance e-commerce brands. Built Kinely's movement-intelligence engine, the TraqGym platform, and its 214-tool AI agent layer.

A rare pairing: the person who **knows the customer cold** and the person who **already built the product**. All IP owned; everything you've seen is live or in beta — not a roadmap. This round funds the first GTM hire — and the first gyms we don't own.

— THE ASK

# ₹4 Cr to turn a built product **into a category.**

**₹4 Cr**

pre-seed

**SAFE**

~₹20 Cr cap

**18–24 mo**

runway

**Applied AI**

vertical, not a model bet

- **What ₹4 Cr buys (by month 12):** scale from 1 paying gym (eGym Lokhandwala, live today) to 10, compounding MRR, one retention/NRR proof point, and 3–5 FreeForm B2B pilots — the gate to a Series A.
- **Why this cap:** benchmarked to Indian operator-led pre-seed (₹1.4–9.5 Cr at ~\$4.5–5M); a ~₹20 Cr cap is defensible for a **built, live, IP-owned** product — 3 products, 73 data models, 214 AI tools, 224 tests shipped by a lean team. Priced for capital efficiency, not US AI-seed froth.



- 40% GTM & sales — land gyms
- 30% Product & AI R&D
- 15% SquatSense growth & events
- 10% Team & ops
- 5% Legal & contingency

Let's build the operating system for fitness. [kinely.ai](https://kinely.ai)

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