Why Invest Now
Sebastian BioPharma | SBP-001

Sebastian BioPharma is at a high-leverage inflection point where core scientific risk has been addressed, and remaining risk is primarily developmental and execution-based. The type of risk that capital and expertise are well suited to mitigate.

Through the exploratory biology phase, the company has generated a robust dataset validating the individual merit of each target, the biological rationale for their combination, and early signals of acceptable tolerability for a novel target. These data establish confidence in the therapeutic hypothesis and justify advancement beyond discovery-stage biology.

In parallel, feasibility studies using non-optimized AOC constructs have demonstrated clear in-vitro potency in relevant human models, confirming that antibody-mediated delivery enables effective intracellular modulation of both pathways. Together, these results validate both the biology and the delivery strategy, allowing the program to move decisively into Discovery Optimization.

Importantly, the company has been explicit about recognizing development risk, including CMC, analytical complexity, and IND-enabling requirements, which are often underestimated at early stages. Rather than deferring these considerations, Sebastian BioPharma has developed a regulatory aligned, stepwise roadmap to candidate nomination, specifically designed to de-risk IND-enabling studies before committing larger amounts of capital.

Execution risk has also been proactively reduced. The founding team brings deep expertise in RNA therapeutics, tumor biology, and antibody–oligonucleotide conjugates, and has already assembled a fully scoped execution plan, including identified service providers and budgeted quotes across key development steps. This preparation enables rapid, predictable execution once capital is deployed.

Sebastian BioPharma's strategy is underpinned by a defensible and expanding intellectual property estate. The company holds an exclusive license from the University of Miami covering foundational method-of-treatment and composition claims related to intracellular targets, supported by a priority date of June 9, 2017. In addition, Sebastian BioPharma has filed a company-owned patent application (January 2026) covering its dual-payload AOC platform architecture, strengthening long-term exclusivity and future pipeline optionality. The IP strategy is actively informed by ongoing competitive landscape analysis to ensure durability and freedom to operate.

The company is currently founder-funded, with Dr. Gilboa as the sole investor to date, having deployed personal capital to complete target validation, biology, and feasibility. This demonstrates strong founder conviction, disciplined capital stewardship, and results in a clean, simple cap table for incoming investors.

Consistent with this disciplined approach, the Pre-Seed round is structured in two milestone-gated tranches:

- $870K–1M (Tranche 1) to complete Discovery Optimization and select pre-candidates
- $1.9–2.5M (Tranche 2) to advance SBP-001 through Lead Characterization and formal Candidate Nomination

This structure allows investors to enter at Tranche 1, evaluate data as it emerges, and deploy follow-on capital against clearly defined milestones, maximizing value creation per dollar while limiting downside risk.

Finally, SBP-001 is strategically positioned for future partnership interest. To the best of our knowledge, it represents the first AOC delivering a dual intracellular payload, while being built entirely from clinically validated components. The program is highly relevant to ADC & RNA-focused companies, and large PD-1–developers facing major patent cliffs beginning in 2028 and actively seeking differentiated, combination-enabling assets.

In summary, this is the moment where validated biology, feasibility, execution readiness, and market timing converge to make investment now both timely and highly leveraged.

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