

ExampleSaaS.io — Red-Flag Scan

Prepared for Sample Acquirer Capital · 2026-06-11 · Asking: \$850,000 · Type: B2B SaaS (listing on marketplace)

CAUTION — resolve flags before LOI

Summary

SAMPLE REPORT. Names and numbers are fictional; the structure, depth, and verdict format are identical to a paid deliverable. Listing claims are directionally consistent with observable signals, but two flags need resolution before an LOI: MRR concentration and an unexplained traffic cliff in March 2026.

Checks

AREA	STATUS	FINDING
Revenue plausibility	PASS	Public pricing x claimed customer count brackets the claimed MRR within 15%.
Customer concentration	FLAG	Testimonial and case-study pattern suggests top-3 customers may exceed 40% of MRR. Request cohort table.
Traffic authenticity	FLAG	Estimated organic traffic dropped ~55% in March 2026; coincides with a core update. Ask for GSC export.
Platform/transfer risk	PASS	Stack is standard (Stripe, AWS, no marketplace dependency). Transfer is clean on its face.
Owner dependence	FLAG	Founder is the only listed support contact and ships all code. No SOPs mentioned anywhere.
Seller history	PASS	No prior listings, consistent identity across platforms, 6-year domain history.

What full diligence would verify

1. MRR reconstruction from Stripe export (not dashboard screenshots)
2. Churn cohort verification
3. GSC traffic verification for the March cliff
4. Codebase review: bus factor and deploy process

5. AI Ops Underwrite: what the support and content load looks like automated

This is a 48-hour screen, not an audit and not a QoE. Full Digital Deal Diligence (\$5,900 flat, 5–7 days) verifies financials against source systems and ends with the AI Ops Underwrite.