



## **Zaldiva, Inc.: Stock Symbol: ZLDV**

Current price (August 2009) \$0.11

Shares Outstanding: 9.5 million fully diluted

**Float: Approximately 3.5 million shares**

**Zaldiva Inc.**, is a classic example of an emerging company in a solid industry ripe for growth. Zaldiva has an experienced, successful management team, strong business plan and clean balance sheet. Simply put, the opportunity here is unlimited. Investors can get a true “ground floor” entrance into one of the most exciting opportunities available in the marketplace today.

The industry (comic books, collectibles, graphic novels and online auctions) is fractionated with the bulk of retail operators in the \$250k to \$500k annual revenue range. Zaldiva will use ZLDV as an acquisition vehicle. Prices for these targeted acquisitions are low, companies need advertising dollars and Zaldiva can buy revenues with accretive earning. The market is vast and Zaldiva will be in a position to add a tremendous amount of additional revenue and earnings. The company plans to roll up existing outlets in Southeast Florida to Central Florida first, then regional Southeast USA and enter major cities, then go national and franchise the distribution system. It is how the company operates as a distribution system, not simply as a retail concern that gives Zaldiva its advantages. The company has over \$2million in hidden assets (real estate equity/fully owned property), no debt and consistent revenue growth.

At this point, Zaldiva enjoys 55-100%+ profit margins on comic books and graphic novels alone. Major publishers such as DC and Marvel Comics increase forward discounts once a retail organization has two or more locations. This means that the larger the distribution network (the more sales point locations), the greater the profits and other benefits that will accrue to Zaldiva. What this means to bottom line is that each small acquisition will, after dilution, bring Zaldiva approximately \$.02 net profit per share on comic book sales. Anticipating ten to fifteen of these smaller acquisitions can net the company \$.30 per share on one product line. The company has identified three larger (\$2-3 million in revenues) targets, which, simply with economies of scale should equal or exceed the net per share enhancements of the smaller purchases. Concurrently, advertising and marketing expenditures will also increase in effectiveness.

Zaldiva became a registered and licensed auction house in the summer of 2008, significantly enhancing its “direct to e-auction” arm. The company is in the midst of kicking off a major marketing and advertising initiative aimed at the business community (inventory reduction and liquidation) as well as investors and financial services professionals. Businesses have already begun to respond as they can expand their marketplace from their local communities to the entire United States and over 33 foreign countries. Individuals in need of cash during the current recession have also inundated the company with memorabilia and collectibles, often with rare and or hard to find items ranging from books to vintage automobiles.

### **Historical Precedence for Business Strategy**

Historically, roll-up strategies have been extremely successful. A good example is Amedisys (AMED), a leading multi-regional provider of home health care nursing services including skilled nursing, aides, PT, OT, ST, MSW and specialized nursing. The company began with nothing more than a dream in the head of William F. Borne (at the time one of the first male nurses in the Baton Rouge area of Louisiana) and a plan to grow by first; establishing his company and model, and then acquiring small and medium sized home health care and skilled nursing care companies. The company went from a start up to revenues exceeding \$1.2 billion.

## **Summary**

Zaldiva is a distribution system unique to the specialty retail industry. The company combines a highly visible brick and mortar location in Ft. Lauderdale, Florida with an e-commerce website and portal which operates in conjunction with a series of ancillary websites and online auctions. This system is the foundation of the company's business and marketing plan as well as its vision and mission statements. Zaldiva will focus its product orientation/acquisitions on comics and collectibles companies, comic conventions and auction houses. This not only plays to the management's expertise, but allows the company to operate in an economic subset that is recession averse and not subject to seasonal or market trends.

The ebay drop off/auction business of Zaldiva is the key. Zaldiva has the licenses and knowledge to expand this area very quickly. People and businesses drop off their items and Zaldiva puts them up for auction for a 50-50 split with the customer. Items that don't sell replenishes Zaldiva's ever-growing inventory at basically a very low total cost. This system can be added to all the potential acquisitions Zaldiva is currently looking at which will enhance their overall revenue and profits. This concept has not been done and the company is working diligently to be the first. Once this distribution model is built, many firms would likely acquire that distribution.

## **Market**

The primary or core business focus of Zaldiva is the comic book and ancillary collectibles market. In order to comprehend the opportunity the company has, it is imperative that we understand the dynamics of the market itself. Today's comic book industry is quite unlike that of prior decades. The days of children buying 12 to 30 cent paperback stories are long gone. What we have now is a multi-stage dynamic that includes movies, dvds, affiliated merchandise (action figures/posters/t-shirts), graphic novels and more. The comic book industry is not just for kids anymore. A good example of this is the evolution of a television series called "Buffy the Vampire Slayer." The popular television epic ran for seven highly successful years. However, a rabid fan base clamored for more. Writers of the series gave them more in the form of an illustrated novel series or comic book called "Season 8." This not only allowed the writer to continue to work, it satisfied the needs of the consumer. Once the series reaches five to six editions they are compiled to form a more complete story in what is known as a "Graphic Novel." Graphic depicts illustration, not necessarily violence, gory detail or vulgarities. Of course, this also allows for the continued sales of "Buffy" action figure collectibles and ancillary products.

**The bottom line is that Zaldiva represents a unique ground floor investment opportunity for those who can afford the risk and hold onto their position while the business plan unfolds.**

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