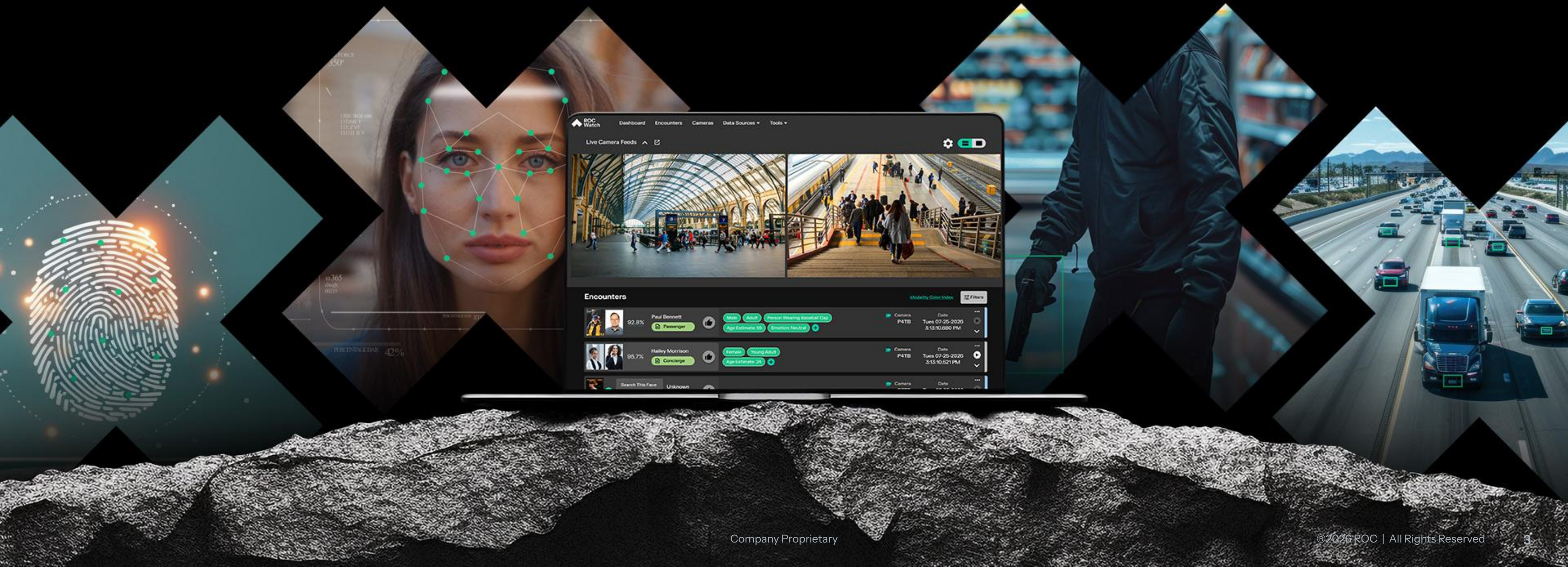
Investor Presentation

August 2026

Forward Looking Statement

This document contains forward-looking statements. In addition, from time to time, we or our representatives may make forward-looking statements orally or in writing. We base these forward-looking statements on our expectations and projections about future events, which we derive from the information currently available to us. Such forward-looking statements involve known and unknown risks, uncertainties and other important factors that may cause our actual results, performance or achievements to be materially different from any future results, performance or achievements expressed or implied by the forward-looking statements. In some cases, you can identify forward-looking statements by words or phrases such as “may,” “will,” “could,” “would,” “expect,” “anticipate,” “aim,” “estimate,” “intend,” “plan,” “believe,” “is/are likely to,” “potential,” “project,” “target,” “continue,” or the negative of these terms or other similar expressions, although not all forward-looking statements contain these words. In evaluating these forward-looking statements, you should consider various factors, including: our ability to develop and sell our proposed products; our ability to source, retain, and expand our technical and business staff to meet the demands of our expanding and diversifying business; our ability to raise the substantial amount of additional funds that will be necessary for our business to succeed, which funds may not be available on acceptable terms or available at all; assumptions relating to the size of the market for our products; unanticipated regulations of our products that add barriers to our business and have a negative effect on our operations; our estimates of expenses, future revenue, capital requirements and our needs for, or ability to obtain, additional financing; our status of an early-stage pre-net income company with a business model and marketing strategy still being developed and largely untested; our ability to avoid a significant disruption in our information technology system, including security breaches, or our ability to implement new system and software successfully; our ability to obtain and maintain intellectual property protection for our products; and other risks identified in our S-1 registration statement. The foregoing does not represent an exhaustive list of matters that may be covered by the forward-looking statements contained herein or risk factors that we are faced with. Forward-looking statements necessarily involve risks and uncertainties, and our actual results could differ materially from those anticipated in the forward-looking statements due to a number of factors, including those set forth above. Except as required by applicable law, we do not plan to publicly update or revise any forward-looking statements contained herein, whether because of any new information, future events, changed circumstances or otherwise.

Vision AI enables machines to see and interpret the world, transforming raw pixels into real-time intelligence.



ROC is a unified Vision AI platform.

We fuse biometrics, video analytics, and mission intelligence into a single operational picture — powering next-gen capabilities across defense, national security, and digital commerce.

One platform. Every modality. Every mission.

See what others can't.

Detect faster and decide smarter with full-spectrum awareness that adapts across missions, environments, and scale.

IDENTITY

Face Recognition

Highly accurate and efficient global algorithm. Ranked by NIST.[1]

Age Estimation

Estimate user age for age-gated access and compliance. Ranked by NIST.[2]

Deepfake & Liveness

Seamless selfie capture with single-frame passive liveness.

Face Analytics

Go beyond IDV with age, gender, emotions, and expressions.

Fingerprint Recognition

Highly accurate and efficient global algorithm. Ranked by NIST.[3]

Latent Fingerprint

Match latent prints in seconds, not hours. Ranked by NIST.[4]

Iris Recognition

Extremely fast and scalable global algorithm. Ranked by NIST.[5]

Tattoo Matching

Highly accurate and efficient tattoo matcher.

License Plate Recognition

Global ALPR support across U.S., CAN, MEX, EU, and APAC.

Object Detection

Detect live threats, anomalies, and patterns in real time.

Weapon Detection

Alert on brandished firearms, including long guns and handguns.

Vehicle Recognition

Identify vehicle make, model, color, and year.

INTELLIGENCE

[1] NIST FRTE
[2] NIST FATE
[3] NIST Fingerprint
[4] NIST ELFT
[5] NIST IREX 10

Results shown from NIST do not constitute an endorsement of any particular system, product, service, or company by NIST.

BUILT BY THE PEOPLE WHO'VE LIVED THE MISSION

At ROC, we go head-to-head with multi-billion dollar companies... and win.

Our team was forged in real-world crises, from 9/11 and the Boston Marathon bombing to Iraq, Afghanistan, and covert operations. We know the stakes because we've lived them.

We pair operators with scientists and engineers from the military, FBI, and leading AI labs — people who carried the mission and now build the tools to win it.

This technical density lets us move faster, build smarter, and solve the hardest problems.

We're not just building AI.
We're building the global infrastructure for identity and intelligence.

+110%	50%	95%	47%
Headcount Growth Last 3 Years [1]	PHDs or Advanced Degrees	Average Retention Rate (FTE only)	Capital Reinvested into R&D (Sep'25 YTD) [2]

[1] 1/1/2023 vs. 1/1/2026
[2] Gross R&D Investment represents total investment in research and engineering, measured as all wage and non-wage costs associated with personnel mapped to the research and engineering function, regardless of whether such costs are expensed, capitalized as software development costs, or allocated to customer R&D delivery projects, divided by total revenue.

Core Missions

National Security

Empower mission success. Secure borders, elevate situational intelligence, and supercharge decision making at speed, precision, and scale.

Public Safety

Protect spaces and increase awareness. Next-gen AI video intelligence, threat detection, and rapid response for law enforcement, smart cities, and beyond.

Digital Identity

Build trusted digital identities. Prevent fraud, onboard customers in seconds, and defy emerging threats—from identity theft to safeguarding minors.

Physical Security

Unify your SecOps with adaptive smart security. Real-time video analytics, access control, and autonomous response in a single pane of glass.

ROC

Face

Fingerprint

Iris

Tattoo

Deepfake

Age

Object

Gun

ALPR

ROC SDK

Biometric Toolkit

Multimodal SDK for deep partner integration. Powers all ROC products.

ROC Watch

AI Video Analytics

Proactive smart security with video analytics, threat detection, visitor management, and video forensics.

ROC Access

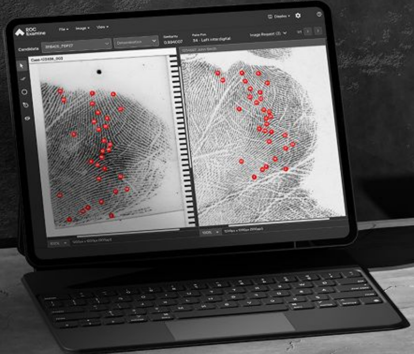
Intelligent Access Control

Transform access points into proactive security. Biometric identity with embedded video analytics.

ROC Evidence

Digital Investigations

Transform fragmented data into actionable evidence for criminal investigations.



ROC ABIS

Next-Gen Biometric Identification

Multimodal ABIS with next-gen tools, workflows, and efficiency for nation-scale biometrics.

ROC Enroll

Remote Identity Authentication

Turn a selfie into a secure biometric template.

Investment Highlights

- **Mission-Critical Vision AI**
  American Identity and security AI deployed where failure is not an option.
- **Path to Durable, Programmatic Recurring Revenue**
  Proven land → expand → program model converting pilots into long-term, embedded programs.
- **High-Value Revenue Economics**
  ~80%+ gross margins, 5–10 year contracts, strong operating leverage.
- **Differentiated Platform Structure, Not Point Solutions**
  Vision AI platform enables cross-sell, low incremental cost, and compounding recurring revenue.
- **Large Markets, Minimal Share Needed**
  Multi-billion dollar markets, attractive economics at sub 1% share.
- **Trusted by the Most Demanding Customers**
  Deployed across national security, law enforcement, allied governments, and global enterprises.
- **Category-Defining Leadership**
  Built by the pioneers who set the standards, backed by elite defense and intelligence advisors.
- **Disciplined, Proven Embedded Upside**
  Growth and scale driven by execution.
- **Utility Modality, Risk Contained, & Debt Free**
  Mission-critical systems represent low churn, predictable organic growth through recurring revenue, high margins, and no long-term debt.

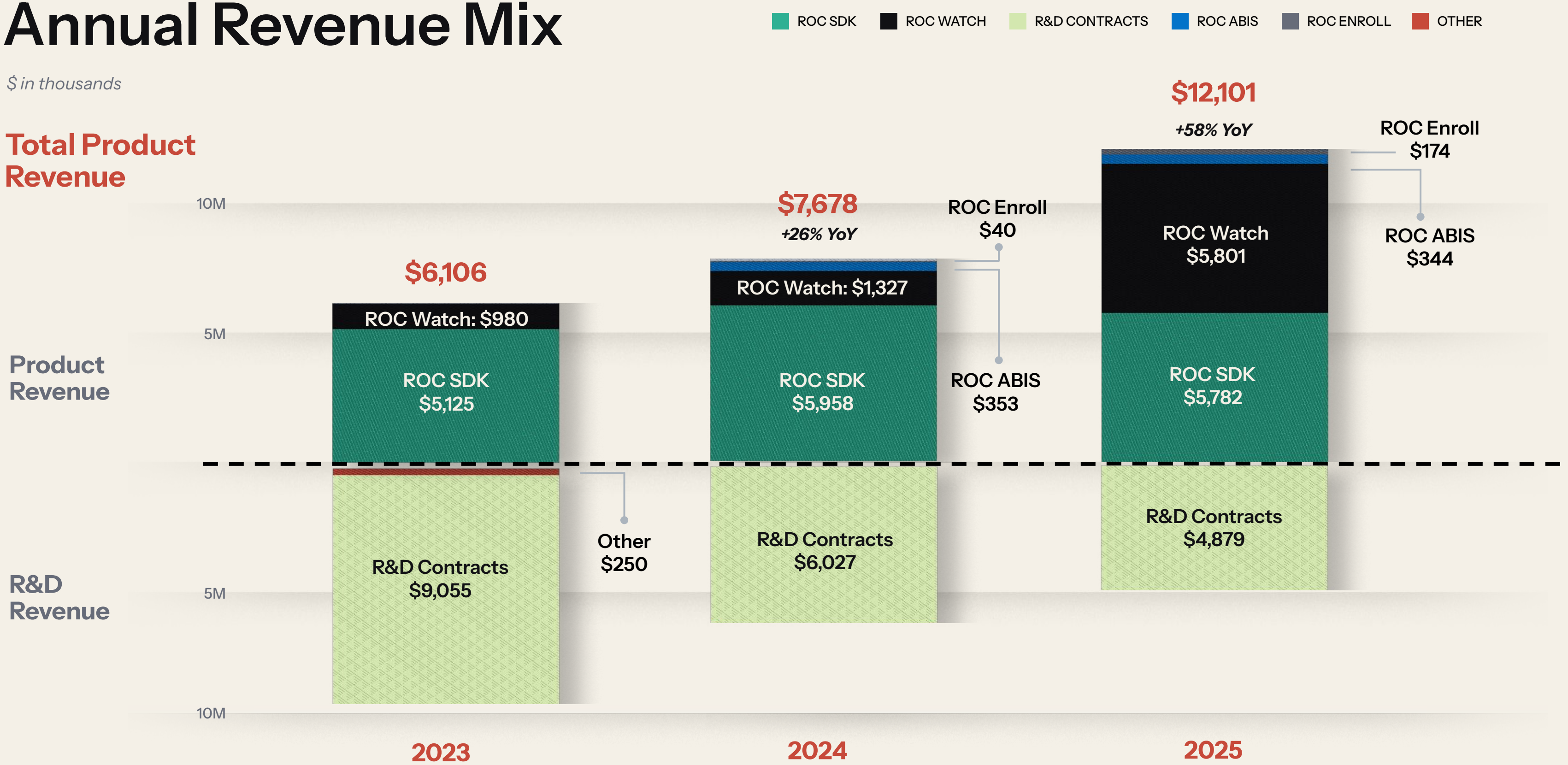
Diverse Revenue Generation

Production Systems, Paying Customers, Early Product Inflection

- Revenue generated across national security, public safety, and digital identity
- Mix of product subscriptions, multi-year licenses, and program-based deployments
- Revenue mix shifting to scalable high-margin recurring revenue
- Gross margins >80% on product revenue
- Vision AI suite of products now commercially deployed and expanding
- Anticipated acquisition of ZTC provides attractive, services-based incremental revenue

Annual Revenue Mix

$ in thousands



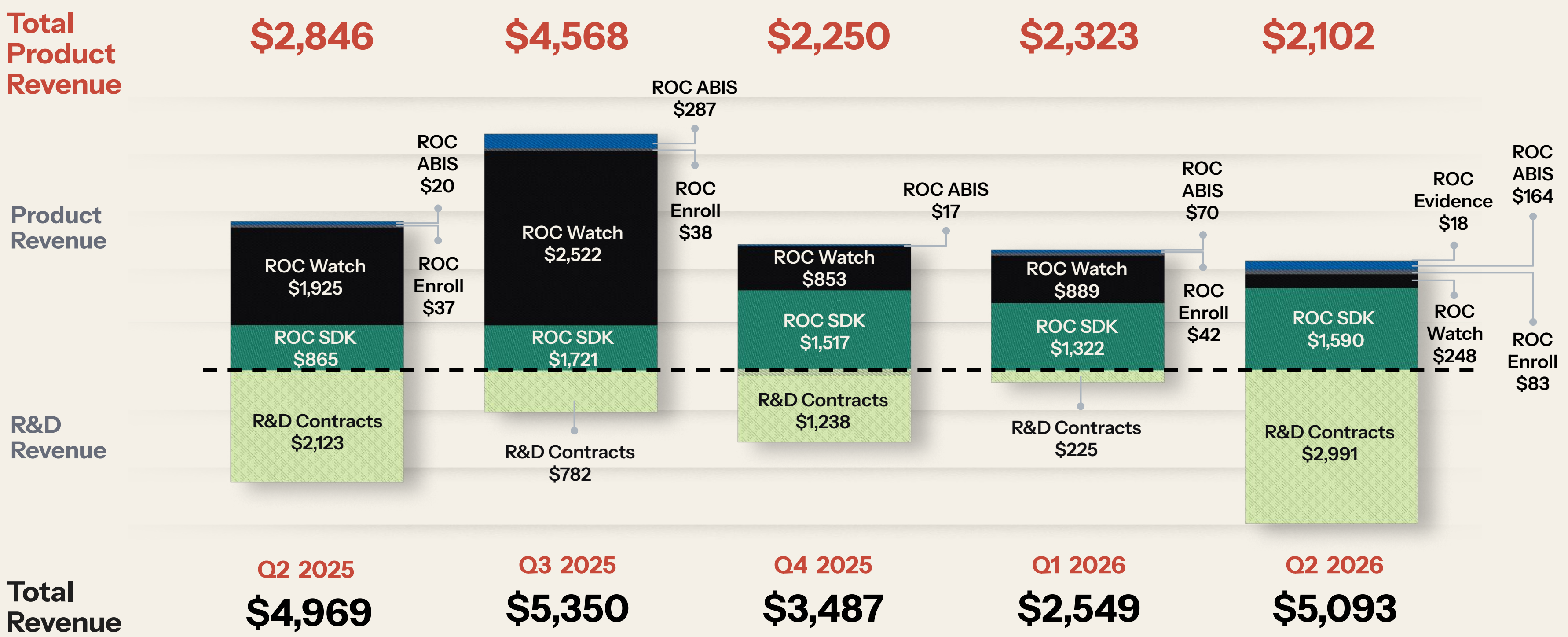
Total Revenue

	2023	2024	2025
Total Revenue	$15,411	$13,705	$16,980

Quarterly Revenue Mix

ROC SDK | ROC WATCH | ROC ABIS | ROC ENROLL | ROC EVIDENCE | R&D CONTRACTS

$ in thousands



Operating Performance

($mm)	2Q 2025	3Q 2025	4Q 2025	1Q 2026	2Q 2026
Gross Profit	$4.0	$4.2	$2.4	$2.0	$4.6
Operating Income (Loss)[1]	$0.8	($0.1)	($1.7)	($3.0)	($0.8)
Gross Margin	80%	79%	69%	79%	90%
Operating Margin[2]	17%	-1%	-50%	-118%	-15%

[1] Operating income (loss) represents gross profit less operating expenses and excludes interest income and expense, income taxes, and other non-operating items, as reported in our audited and reviewed financial statements.

[2] Operating margin is calculated as operating income (loss) divided by total revenue, based on amounts reported in our audited and reviewed financial statements. Operating income (loss) reflects gross profit less operating expenses.

Completed and Expected Revenue Drivers

2025

- Commercial scale up of ROC Watch and ROC Evidence
- Expansion of national security and law enforcement programs
- ROC Enroll telecom and digital identity rollouts
- Initial rollout of large-scale ROC ABIS implementations
- Growing portfolio of long-duration government & enterprise programs

2026

- Initial rollout of ROC Access and continued scale-up of ROC ABIS and ROC Evidence
- High-margin recurring revenue with strong expansion dynamics

Ongoing conversion of pilot programs and follow-on Firm-Fixed Price (FFP) contracts into 3–5 year recurring revenue programs results in a clear path from early revenue to durable recurring revenue.

Product & Service Profiles

Product / Service	Pipeline Driver	Contract Characteristic Positioning
ROC ABIS	State & Federal System-of-Record	5–10 yr Firm-Fixed Price (FFP)*
ROC Evidence	Government & Private Sector Litigation	5–7 yr, Variable (FFP and/or Usage)
ROC Watch	Commercial Security & Government Tactical Operations	3–5 yr, FFP
ROC Enroll	Government & Private Sector Identity Proofing	1-3 yr, Variable (FFP and/or Usage)
ROC Access	Commercial Security, Access Control, Time & Attendance	Per Unit
ROC SDK	Government & Private Sector Build Your Own Solutions	1-5 yr, Variable (FFP and/or Usage)
R&D Contracts	Congressional Funding & Government Research Needs	1-3 yr, FFP and/or Time & Materials

*A firm fixed-price contract provides for a price that is not subject to any adjustment on the basis of the contractor's cost experience in performing the contract (FAR 16.202-1).

ROC

Capital Allocation Priorities

- **Scale What's Working**
  Expand engineering, deployment, and customer success capacity to support multiple large-scale programs converting in parallel.
- **Shorten Time to Recurring Revenue**
  Invest in compute and infrastructure to accelerate model training, deployment velocity, and program expansion timelines.
- **Support Programmatic Growth**
  Fund the operational backbone required for five- to seven-year government and enterprise contracts as pilots convert into systems of record.
- **Preserve Margin Discipline**
  Capital is deployed into a high-gross-margin model with strong operating leverage — not speculative R&D or unproven markets.

Objective:

Accelerate recurring revenue realization and de-risk execution — no change to the business model.

Total Addressable Market

A massive multi-vertical market opportunity.

[1] Precedence Research
[2] Research and Markets
[3] Fortune Business Insights
[4] Grandview Research

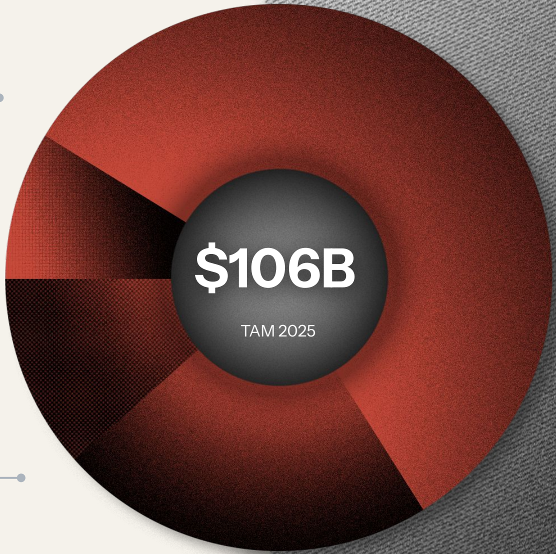
$1.8T
AI UNIVERSE

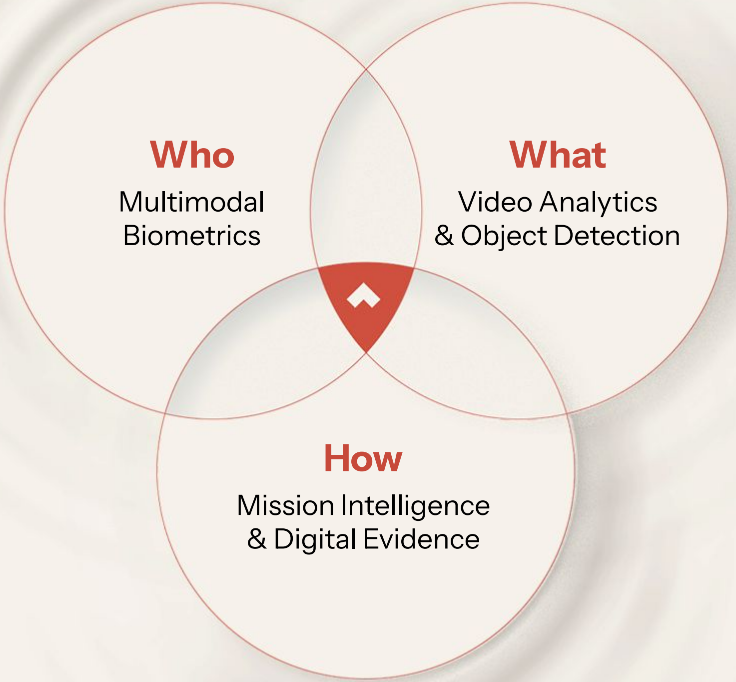
Biometrics[1]
$60.3B

Digital Evidence[2]
$9.4B

Video Analytics[3]
$12.3B

Vision AI[4]
$23.7B
AI-powered face, age, deepfake, liveness, and object recognition across image and video.





We help agencies and enterprises answer three critical questions

WE ARE ROC

Identity + Intelligence

This convergence creates a category-disrupting platform—with no direct rival in scope or scale.

ROC stands at the inflection point, delivering end-to-end multimodal capabilities from detection to decision.

Biometrics IDEMIA	**$3B** (private acquisition)
Video Analytics AXON	**$50B** (public, Sept 2025)
Mission AI ANDURIL	**$14B** (private, Series E 2023)
Data Fusion Palantir	**$390B** (public, Sept 2025)

ROC

Leadership Team

Scott Swann

Chief Executive Officer and Director

20+ years in the FBI with DoD, IC, and govt experience. 10 years leading major biometric providers.

Brendan Klare, PhD

Chief Scientist, President, and Board Chairman

15+ years thought leadership in AI/ML. Subject matter expert for DoS, FBI, DoD, and IARPA. Former U.S. Army Ranger.

Josh Klontz

Chief Technology Officer and Director

15 years of biometrics software engineering and Vision AI innovation.

MANAGEMENT

J. Blake Moore

Chief Operating Officer

10 years leading high-profile commercial and government biometrics programs. Supported TSA Precheck.

Cody Barnes, CPA

Chief Financial Officer

15+ years in combined finance, accounting, tax, operations, human resources, and banking experience.

Nick Bartlow, PhD

Chief Engineer

15+ years building enterprise identity systems for the FBI, IC, DHS, and DoD.

Sam Cava

Strategic Advisor

25+ years in the FBI, DoD, and IC focused on biometrics, ID intelligence, digital evidence and operational technologies.

David Ray

General Counsel and Head of Capital Markets

15+ years in law practice, government affairs, and technology, overseeing legal governance and ethical AI frameworks.

Independent Board Members

Brian Hibbeln

Former NASIC & NRO; Ex-Assistant Deputy Undersecretary of Defense

Defense innovation leader with 30+ years in DoD and Intelligence. Founding Director of the DoD's Special Capabilities Office, overseeing $10B+ in intelligence, space, and airborne programs. Venture Partner at SineWave Ventures with advisory roles across Fortune 500 companies and quantum computing.

Dawn Meyerriecks

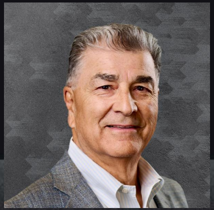
Former Deputy Director of CIA for Science and Technology

Mission-driven technologist with 40+ years in CIA & national programs, pioneering new products and transforming operations at scale. Brings rare technical and stakeholder depth, aligning innovation and engineering with national security imperatives.

Ed Davis

Former Commissioner, Boston Police Department

Public safety leader with 35+ years in law enforcement. Nationally recognized for crisis leadership during the Boston Marathon bombing, pioneering community policing, and advising both government and private sector on security, intelligence, and resilience.



Steven Martinez

Former Executive Assistant Director of FBI and Ex-Head of Global Security, MGM Resorts

Veteran intelligence leader with 25+ years at the FBI, where he led the Science & Technology Branch, including the Laboratory, Operational Technology, and Criminal Justice Information Services. Recognized for advancing biometric innovation, forensic science, and national-scale identity systems across U.S. and allied missions.

Kathleen Kiernan

Former President, NEC National Security Systems

National security and identity technology leader with 30+ years in federal law enforcement and industry. Former President of NEC National Security Systems and Assistant Director at ATF. Recognized expert in biometric identity, critical incident preparedness, and strategic threat intelligence.

Born of American ingenuity. Built for the world.

Investor and Media Relations
media@roc.ai

Thank you.

Appendix

Condensed Consolidated Statements of Operations

Three months ended & Six months ended, June 30th

	Three Months Ended June 30		Six Months Ended June 30	
($ in whole dollars)	2026	2025	2026	2025
Revenue	$5,092,982	$4,968,922	$7,641,624	$8,142,444
Cost of sales	526,273	974,427	1,069,267	1,634,164
Gross profit	**4,566,709**	**3,994,495**	**6,572,357**	**6,508,280**
Selling, general and administrative	3,272,434	1,821,576	6,205,656	3,798,292
Research and development	2,069,768	1,349,326	4,157,535	2,903,572
Total operating expenses	**5,342,202**	**3,170,902**	**10,363,191**	**6,701,864**
Operating (loss) income	**(775,493)**	**823,593**	**(3,790,834)**	**(193,584)**
Interest income (expense)	10,705	(12,895)	(8,712)	(23,095)
Other income (expense)	(51,725)	—	(55,161)	—
Total other expense	**(41,020)**	**(12,895)**	**(63,873)**	**(23,095)**
(Loss) income before tax	**(816,513)**	**810,698**	**(3,854,707)**	**(216,779)**
Provision for (benefit from) income taxes	—	229,494	—	(61,319)
Net (loss) income	**$(816,513)**	**$581,204**	**$(3,854,707)**	**$(155,360)**
Earnings (loss) per share — basic	$(0.04)	$0.04	$(0.22)	$(0.01)
Earnings (loss) per share — diluted	$(0.04)	$0.04	$(0.22)	$(0.01)
Weighted-average shares — basic	19,080,127	14,999,087	17,859,295	14,992,287
Weighted-average shares — diluted	19,080,127	16,099,632	17,859,295	14,992,287

Condensed Consolidated Balance Sheets

June 30, 2026 & December 31, 2025

	June 30, 2026	December 31, 2025
Assets		
Cash	$11,913,463	$270,560
Accounts receivable, net	5,590,579	4,155,230
Prepaid expenses and other current assets	694,910	420,785
Total current assets	**18,198,952**	**4,846,575**
Property and equipment, net	1,030,318	268,569
Intangible assets, net	4,759	5,519
Operating lease right-of-use asset	945,954	1,088,181
Capitalized software, net	1,755,147	726,582
Other assets	35,643	30,195
Total non-current assets	**3,771,821**	**2,119,046**
Total assets	**$21,970,773**	**$6,965,621**
Liabilities and stockholders' equity (deficit)		
Accounts payable and accrued expenses	$2,117,986	$2,802,961
Deferred revenue	954,360	1,382,995
Line of credit	—	1,839,891
Current portion of operating lease liabilities	312,328	306,113
Total current liabilities	**3,384,674**	**6,331,960**
Long-term operating lease liabilities	755,967	912,229
Deferred tax liability	13,703	13,703
Other long-term liabilities	8,879	—
Total long-term liabilities	**778,549**	**925,932**
Total liabilities	**4,163,223**	**7,257,892**
Common stock, par value $0.01/share[1]	190,801	150,217
Additional paid-in capital	26,140,399	4,226,455
Accumulated deficit	(8,523,650)	(4,668,943)
Total stockholders' equity (deficit)	**17,807,550**	**(292,271)**
Total liabilities and stockholders' equity	**$21,970,773**	**$6,965,621**

[1] 100,000,000 shares authorized; 19,080,127 and 15,021,650 shares issued and outstanding as of June 30, 2026, and December 31, 2025, respectively.

ROC

Condensed Consolidated Statements of Cash Flows

Six months ended, June 30th

Cash flows from operating activities:	2026	2025
Net loss	$(3,854,707)	$(155,360)
Stock-based compensation	472,257	180,446
Depreciation and amortization	164,232	69,164
Non-cash lease expense	175,424	177,901
Change in expected credit losses	25,200	104,220
Accounts receivable, net	(1,460,549)	63,568
Prepaid expenses and other current assets	(274,125)	41,743
Deferred tax asset	—	(61,319)
Other assets	(5,448)	—
Deferred revenue	(428,635)	(775,712)
Accounts payable and accrued expenses	(684,975)	404,185
Lease liability	(183,245)	(175,026)
Other long-term liabilities	8,879	—
Net cash used in operating activities	**(6,045,692)**	**(126,190)**
Cash flows from investing activities:		
Purchases of property and equipment	(864,485)	—
Capitalized software	(1,089,301)	(354,171)
Net cash used in investing activities	**(1,953,786)**	**(354,171)**
Cash flows from financing activities:		
Net proceeds from issuance of common stock	21,482,271	—
Proceeds from the exercise of stock options	—	8,106
Repayment to the line of credit, net	(1,839,890)	(192,859)
Net cash provided by (used in) financing activities	**19,642,381**	**(184,753)**
Net change in cash	**11,642,303**	**(665,114)**
Cash at beginning of period	270,560	726,436
Cash at end of period	**$11,913,463**	**$61,322**
Supplemental disclosures:		
Cash paid for interest	$70,848	$23,019
Noncash investing and financing activities:		
Fair value of warrants issued with initial public offering	$936,042	—

Revenue Disaggregation – Quarterly

Three months ended, June 30th

Revenue Line	Q2 2025	Q2 2026	$ Change	% Change
ROC SDK	$0.86M	$1.59M	+$0.73M	+84%
ROC Watch	$1.92M	$0.25M	$(1.68)M	(87)%
ROC ABIS	$0.02M	$0.16M	+$0.14M	+723%
ROC Enroll	$0.04M	$0.08M	+$0.05M	+125%
ROC Evidence	$0.00M	$0.02M	+$0.02M	n/m
Total product revenue	**$2.85M**	**$2.10M**	**$(0.74)M**	**(26)%**
R&D contract revenue	$2.12M	$2.99M	+$0.87M	+41%
Total revenue	**$4.97M**	**$5.09M**	**+$0.12M**	**+2%**

Revenue Disaggregation – Year to Date

Six months ended, June 30th

Revenue Line	H1 2025	H1 2026	$ Change	% Change
ROC SDK	$2.54M	$2.91M	+$0.37M	+15%
ROC Watch	$2.43M	$1.14M	$(1.29)M	(53)%
ROC ABIS	$0.04M	$0.23M	+$0.19M	+490%
ROC Enroll	$0.27M	$0.12M	$(0.15)M	(55)%
ROC Evidence	$0.00M	$0.02M	+$0.02M	n/m
Total product revenue	**$5.28M**	**$4.43M**	**$(0.86)M**	**(16)%**
R&D contract revenue	$2.86M	$3.22M	+$0.36M	+12%
Total revenue	**$8.14M**	**$7.64M**	**$(0.50)M**	**(6)%**