

THIRD EYE VENTURES

Investing at the edge of human possibility.

Reality is becoming more malleable. Human capability and human experience are expanding. We invest in the companies pushing the boundaries of what is possible, perceptible, and ultimately human.

Technology • Biology • Intelligence • Consciousness • Experience • The Physical World

SEE WHAT OTHERS DON'T.

INVEST WHERE THE BOUNDARIES MOVE.

01 / THE THESIS

The limits we inherited are not necessarily the limits we keep.

For most of history, human beings operated within boundaries that appeared fixed: how long we could live, how quickly we could learn, how much one person could create, what our bodies could withstand, how intelligence worked, and what we considered physical, digital, biological, artificial, or even human.

Those boundaries are beginning to move. Artificial intelligence can extend cognition. Biotechnology can increasingly influence the machinery of life. Neurotechnology is creating new interfaces with the brain. New biologics are changing how we think about health, performance, aging, perception, mood, and states of awareness. Robotics is giving intelligence a physical form. Entertainment is becoming more immersive, adaptive, participatory, and capable of shaping how we experience ourselves and the world around us.

At Third Eye Ventures, we believe the most important opportunities emerge when the boundary of what is possible moves faster than the market's understanding of what that change means.

We do not see these shifts as isolated sector trends. We see them as a broad expansion of the human possibility space, and therefore the investable possibility space. The boundaries between biology and technology, intelligence and computation, treatment and enhancement, audience and participant, inner and outer experience, and physical and digital reality are becoming less rigid.

Third Eye Ventures exists to invest at those intersections.

The frontier is not only external.

Human progress has traditionally been measured by our ability to change the world around us. We believe an equally important frontier is emerging inward: the ability to better understand and influence attention, perception, emotion, memory, identity, connection, and states of consciousness.

Questions once explored primarily through philosophy, contemplative traditions, art, and personal experience are increasingly intersecting with neuroscience, biotechnology, computation, immersive

media, and rigorous measurement. We are interested in companies that approach this territory with ambition and intellectual seriousness, turning deeper questions about the human experience into technologies, therapies, platforms, and experiences that can be tested, understood, and scaled.

To us, expanding reality does not mean escaping it. It means expanding the range of what humans can perceive, understand, feel, create, and experience within it.

Why now

- **New capability.** A scientific or technological threshold becomes possible for the first time.
- **Falling friction.** Cost, access, compute, distribution, regulation, or infrastructure changes enough to make adoption realistic.
- **Lagging consensus.** The implications are larger than what the market currently understands.

That gap between new capability and old assumptions is where we believe exceptional companies can emerge.

02 / THE QUESTION BEHIND THE COMPANY

We are drawn to questions that change the shape of the future.

The companies that interest us often begin with a question that sounds uncomfortable, improbable, premature, or impossible. We do not need the answer to be obvious. We need the pursuit to be serious, technically grounded, and capable of creating something that did not exist before.

What if aging becomes increasingly controllable rather than simply managed?

What if human cognition, perception, and performance can be meaningfully augmented?

What if biology becomes increasingly programmable?

What if new biologics and neurotechnologies deepen our ability to influence health, consciousness, mood, and experience?

What if entertainment evolves from something we consume into something we inhabit, shape, and feel?

What if one person equipped with artificial intelligence can create what once required an entire organization?

What if tools for exploring perception, identity, connection, and conscious experience become as rigorous as the tools we use to understand the physical world?

These are not predictions about a distant future. They are search criteria for where tomorrow's category-defining companies may already be forming.

03 / WHERE WE INVEST

We invest in companies moving the boundary.

Third Eye Ventures is industry-agnostic by design. We do not search for companies because they belong to the right category. We search for companies that make existing categories feel incomplete.

Human Biology

Biotechnology, advanced biologics, longevity, regenerative medicine, synthetic biology, diagnostics, precision health, human performance, novel therapeutics, and biological engineering. We are especially interested in moving health beyond treating disease toward expanding healthy human capability.

Consciousness & Cognition

Neurotechnology, brain-computer interfaces, cognitive enhancement, neuroscience platforms, sensory augmentation, mental-health technology, and new modalities that responsibly expand our understanding of attention, perception, emotion, memory, altered states, sense of self, and consciousness. We are interested in tools that do not merely improve cognition, but deepen our understanding of the mind and widen the range of human experience.

Artificial Intelligence

AI-native companies, autonomous agents, robotics, computational infrastructure, human-AI collaboration, creative intelligence, machine perception, and new interfaces. We are interested in what happens when intelligence itself becomes infrastructure.

Experience, Media & Entertainment

Immersive entertainment, gaming, spatial computing, mixed reality, interactive media, virtual worlds, live experiences, creator platforms, social products, and AI-generated media. We are interested in experiences that can create presence, awe, connection, identity, participation, and entirely new forms of cultural expression. The next great entertainment company may give people somewhere else to be, not merely something to watch.

The Physical Frontier

Robotics, aerospace, advanced manufacturing, energy, defense technology, advanced materials, transportation, infrastructure, and industrial automation. We look for teams capable of turning previously theoretical possibilities into physical reality.

The Unclassified

Companies that sit between biotechnology, intelligence, consciousness, entertainment, consumer behavior, philosophy of mind, and entirely new forms of human experience. Some may address questions that historically belonged more to philosophy than industry. If new science or technology makes those questions actionable, measurable, and commercially meaningful, we want to understand them. If the category barely exists yet, that can be a feature rather than a flaw.

04 / OUR INVESTMENT LENS

Beyond incremental.

We are less interested in making an existing system marginally better. We are interested in companies that can change the system entirely, create a new category, or expand the range of what people believe can be built.

- **Non-consensus insight** The founder sees something important before the market does.
- **New capability** A scientific or technological threshold has recently been crossed.
- **Expanding market** The potential market is materially larger than it first appears.
- **Human impact** The product can fundamentally change capability, behavior, perception, awareness, connection, or experience.
- **Defensible edge** There is a credible advantage in technology, data, network effects, distribution, regulation, or execution.
- **Unusual founder** The founder combines conviction, insight, obsession, adaptability, and the ability to execute.
- **Category creation** Success can create a market that does not meaningfully exist today.
- **Asymmetric upside** There is a plausible world in which the outcome is disproportionately meaningful relative to the capital required.

We are willing to look where consensus has not arrived yet.

Transformative companies often look strange before they look obvious. New industries frequently begin at the margins, where language, regulation, infrastructure, and conventional wisdom have not yet caught up with what is becoming technically possible.

That does not mean we invest in futurism for its own sake. An unconventional idea is not automatically a good investment. We separate genuine technical progress from narrative, hype, and wishful thinking. Our willingness to look early is paired with a high bar for evidence, economics, execution, and founder quality.

We do not invest because something sounds futuristic. We invest when the future is beginning to become technically possible.

How we think

- **Possibility over convention.** We are comfortable challenging inherited assumptions when the technology, science, economics, and execution can support the ambition.
- **Rigor over futurism.** The stranger the idea, the more seriously we examine the evidence behind it.
- **Founders over categories.** Categories evolve. Exceptional founders can create new ones.
- **Asymmetry over incrementalism.** Early-stage outcomes are nonlinear. We look for opportunities where success can matter far more than consensus initially expects.
- **Curiosity over certainty.** The frontier is uncertain by definition. We would rather investigate a difficult idea deeply than dismiss it because it lacks a familiar label.
- **Responsible expansion.** Technologies that influence biology, cognition, consciousness, identity, or behavior can have profound consequences. Ambition and responsibility should scale together.

CLOSING

The future rarely arrives looking obvious.

We believe the coming decades will repeatedly force humanity to reconsider what is natural, possible, intelligent, healthy, immersive, conscious, creative, and human. The frontier will not only be defined by what we can build in the world, but by how deeply we can understand and shape the experience of being in it. Third Eye Ventures exists to find the founders doing that work before the rest of the world has fully understood what they are building.

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