

BP3M FORM (MAGIC FORM)

1 club operated · VALENTON · company founded 2014-12-24

1 club

Valenton
opened 2014–2014

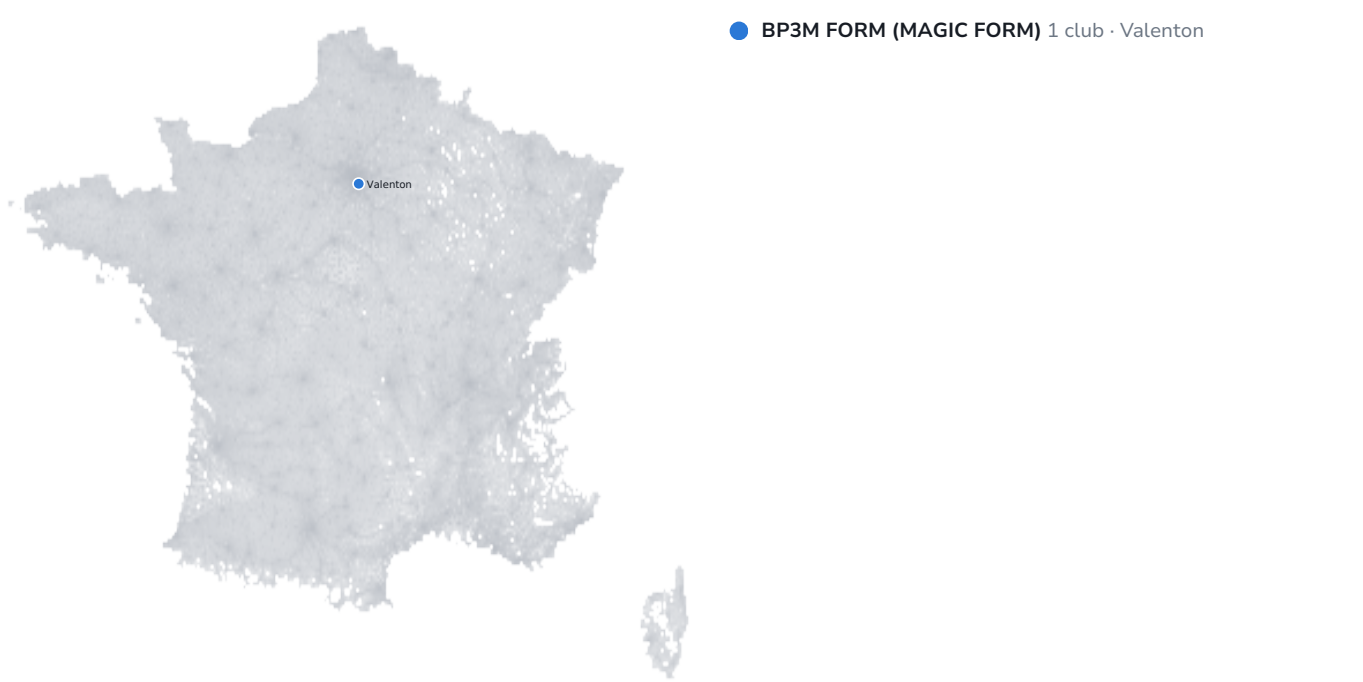
€-16,318

EBITDA 2020

revenue €318,197 ·
net €-29,277

equity €91,123 · financial
debt €232,353 · cash
€209,477 · 1 risk flag

WHERE THE CLUBS ARE — 1 club



CLUBS OPERATED — competition and capture, at opening and today

CLUB	CITY	OPENED	COMPETITION GYMS WITHIN, OPENING → TODAY		CAPTURE PEOPLE, OPENING → TODAY	
			500 M	2 KM	500 M	2 KM
MAGIC FORM	Valenton 94460	2014	1 → 2	2 → 5	6,397 → 3,236	24,787 → 11,461

Competition: genuine gym floors within the ring, by registry opening date. Capture: residents and workers the gravity model assigns to this floor against every competitor within 3 km, demand at its 2021 vintage.

LEGAL IDENTITY — INSEE Sirene

Legal name	BP3M FORM (MAGIC FORM)
SIREN	807958954
Founded	2014-12-24
Activity	93.13Z NAF/APE code
Employees	02 Sirene band
Officers	STEPHANE MARC PARDIN (Gérant)

FILING & CAPITAL — INPI RNE

Registered capital	€10,000
Years filed	1 of the last 1 on record — 1 complete
Debt falling due	not filed — the maturity table is a complete-regime page
Confidentiality	never invoked — every filed income statement is public
Ownership changes	not tracked — officers are a snapshot at each data refresh, not a filing history; France also closed the beneficial-ownership registry to public access in July 2024

RISK FLAGS — from the accounts

▼ high leverage — 2020, debt €232,353 vs EBITDA €-16,318

FILED ACCOUNTS — INPI, keyed annual accounts; one filing covers all 1 clubs

YEAR	REVENUE	EBITDA	MARGIN	OPERATING	NET EQUITY	FIN. DEBT	CASH	STAFF COST	EXT. CHARGES	FTE	
2020	€318,197	€-16,318	-5%	€-3,713	€-29,277	€91,123	€232,353	€209,477	€81,271	€276,189	—

EBITDA derived from the filed income statement; rent sits inside external charges; "withheld" is an L.232-25 confidentiality declaration.

MAGIC FORM Valenton

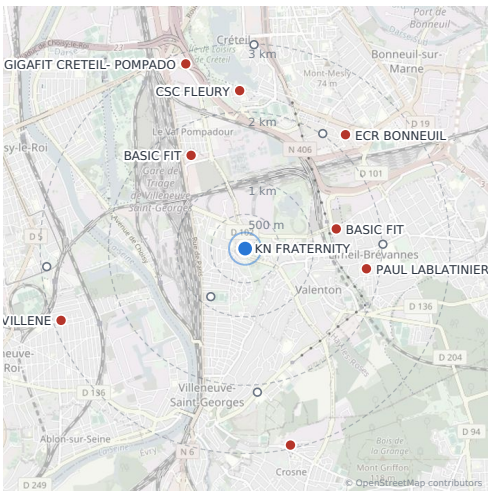
5 RUE ALFRED KASTLER 94460 VALENTON · opened 2014-12-24 · SIRET 80795895400016

CHANGE SINCE OPENING — 2014 → today

	AT OPENING	TODAY	CHANGE
Location score	76.6	66.6	-10.0
Gyms within 1 km	1	2	+1
Gyms within 2 km	2	5	+3
Competition weight, 2 km	0.70	3.10	+343%
Capture, 2 km	24,787	11,461	-54%
Saturation, 2 km vs national baseline	-84%	-33%	+51 pts

Competitor field as it stood on 2014-12-24 against today's; demand at its 2021 vintage at both dates. Red is a move against the club of five score points, two gym floors or a quarter of the measure; green the reverse.

WITHIN 3 KM TODAY



9 gym floors, 6 other sports sites. Rings at 500 m, 1, 2 and 3 km.

SCORE TODAY — seven parameters, five measured at 500 m and 2 km

PARAMETER	WHERE	MEASURED	SCORE	HOW IT WAS ARRIVED AT
Catchment weight 20%	63 500 m	4,634 people	67	3,666 aged 18-64 + 968 workers = 4,634 over 0.79 km2 = 5,900/km2
	2 km	42,001 people	61	32,048 aged 18-64 + 9,954 workers = 42,001 over 12.57 km2 = 3,342/km2
Competition weight 15%	60 500 m	1.00 wt	58	1 genuine gym floor and 0 other sports sites within 500 m, weighted by substitutability and price tier
	2 km	3.10 wt	61	4 genuine gym floors and 1 other sports site within 2 km, weighted by substitutability and price tier
Capture weight 20%	84 500 m	3,236 people	81	2,807 residents + 429 workers, demand within 500 m against every competitor within 3 km
	2 km	11,461 people	85	9,801 residents + 1,660 workers, demand within 2 km against every competitor within 3 km
Saturation weight 15%	100 500 m	not measured	—	catchment of 6,252 residents is below the 10,000 needed for a density measure to mean anything — one club would move it by 1.5 LQ
	2 km	LQ 0.67	100	4 clubs / 54,414 residents = 7.35 per 100k against 11.01 nationally
Fit weight 10%	— unit	not measured	—	no floor area recorded for this unit
Rental weight 10%	— unit	not measured	—	no rent or no floor area recorded
Income weight 10%	0 500 m	0.77×	0	17,200 EUR against 22,380 nationally, median of 3 IRIS within 500 m
	2 km	0.76×	0	17,070 EUR against 22,380 nationally, median of 16 IRIS within 2 km

NEAREST GYMS — 9 within 3 km; ▲ opened after 2014

0.0 ▲ KN FRATERNITY 2018	1.36 ▲ BASIC FIT Basic-Fit 2023
1.58 BASIC FIT Basic-Fit	1.8 ▲ PAUL LABLATINIERE 2025
2.22 ECR BONNEUIL 2012	2.31 ▲ CSC FLEURY 2019
2.84 ▲ GIGAFIT CRETEIL-POMPADOUR GigaFit 2017	2.89 CERCLE OLYMPIQUE VILLENEUVE-ABLON 1994
... and 1 more within 3 km.	

ACCESS — straight-line, GTFS

Rail	Villeneuve Triage — 1353 m
Bus	Acti Park — 32 m
Footfall	VILLENEUVE TRIA — 1365 m, 261,020 validations/yr RATP
Shops	25 within 150 m INSEE BPE