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Author: rihards.btc (Ultra Squad). Sources checked 30 Sep 2026. Disclosure: no position, no compensation from Optimum. NFA.

Question: Optimum sells speed (faster block and blob propagation). Will the market pay for it, and what would a future token have to do?

What it builds: mump2p, a sidecar next to Ethereum clients that replaces gossipsub propagation with RLNC (Random Linear Network Coding). Long-term goal: a decentralized memory layer for any chain (getoptimum.xyz, docs.getoptimum.xyz).

Evidence:

- ~150ms average block propagation on Ethereum Hoodi testnet; 6-20x faster block/blob delivery vs gossipsub; ~90-95% less bandwidth (site)
- 40+ testnet partners, ~\$24B of ETH stake connected (site, self-reported)
- \$11M seed on 15 Apr 2025, led by 1kx with Robot Ventures, CMT Digital, Spartan, Animoca, GSR and others (CoinDesk)
- Public team: CEO Prof. Muriel Medard (MIT, co-inventor of RLNC), co-founders Kent Lin (BD, tokenomics) and Dr. Kishori Konwar
- Open code: github.com/getoptimum (mump2p-cli, optimum-gateway, active PRs)
- No token, ticker, supply or TGE published; no public sale found

Interpretation:

- 1) Rare pre-TGE combo: named academic team, open code and a claim you can measure on a public testnet.
- 2) The benefit goes to validators and builders (faster blocks), not end users. Token demand has to come from node operators paying or staking for bandwidth, otherwise the token is optional.
- 3) Tokenomics unknown. A \$11M seed from 15+ funds means a sizable investor allocation; the unlock schedule will decide TGE pressure.

Risks: adoption depends on client teams, testnet is not mainnet load, a gossipsub upgrade could shrink the gap, token utility is not defined.

Conclusion: strong tech watchlist. 7/10 on team + product, n/a on tokenomics. Re-rate when token design and investor vesting are published. PDF attached.