

# 8090\_Factory's \$135M Series A, Nuclear-AI Infrastructure, and Applied AI Signals

VC Tech Radar

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Chamath's \$135M 8090\_Factory bet leads this brief, followed by high-signal emerging teams like Mycall and CheckVibe, Valor Atomics' startup nuclear milestone, and market signals around energy abundance, model routing, and AI SaaS distribution.

### 1) Funding & Deals

- **8090\_Factory raised a \$135M Series A around a full-stack enterprise software thesis.** Chamath says the company is trying to let enterprises build and maintain their own software without the "\$4T in consultants and middleware" that usually comes with enterprise development. He frames the opportunity by pointing to companies like Facebook, Tesla, and Google that "refused" the traditional software stack. [1]
- **Beyond explicit rounds, nuclear is producing an investor-to-founder signal.** Scott Nolan says that after nearly a year looking for an American company that could enrich uranium at scale and finding none, he started General Matter at the end of 2023. He argues that as baseload demand expands, partly because of AI, and more advanced reactors come online, enrichment has become the bottleneck; he also says the U.S. relies on foreign suppliers for over 20% of traditional-reactor enriched uranium and 100% of advanced-reactor fuel. General Matter says it is restoring U.S. capability at facilities from California to Kentucky with DOE support. Founders Fund had previously invested in Radiant, Doug Bernauer's containerized microreactor company for remote demand. [2]

## 2) Emerging Teams

- **Mycall is a strong applied voice-AI company to watch.** The company is building a self-learning debt collection system whose agents call, negotiate, secure a promise to pay, and follow up via WhatsApp until payment lands. The founder previously ran a 170-person debt collection team and says the product was built around the points where humans fail and AI performs. Mycall reports 14 customers, \$28k MRR, and 15% month-over-month growth, with customers seeing up to 28% better recovery, 32% higher contact rates, and 76% lower staff cost. It also says it collected more than \$6M for one client last month, generated \$600k of additional recovery for Alvas in Mexico, and is being rolled out with Indrive across 48 countries. [3]
- **CheckVibe is an early monetization signal around security for AI-built apps.** The two-person, bootstrapped team says its scanner finds frontend secrets, open database rules, and missing headers, and that it has reached about \$7k gross revenue, 200+ paying customers, and 5k signups in three months. The distribution playbook is also notable: TikTok slideshows reportedly drove viral signups, prospect-specific scans produced high reply rates, and a paywall redesign that showed issue counts instead of fully blurring results tripled conversion. [4]
- **Smart OCR is a technically sensible developer-tooling bet in document extraction.** The founder built it after frustration with fragile PDF parsers that break when layouts change. Users POST a document plus the exact JSON schema they want back; the system combines native OCR and Vision LLMs to interpret layout, handle skewed images and tables, and return typed JSON, with async webhooks for large PDFs. The founder is offering 10 free credits for testing. [5]

## 3) AI & Tech Breakthroughs

- **Valor Atomics is making one of the sharper technical claims in this set.** The company says OR250 is the first advanced reactor to make power by a startup and the first advanced reactor built outside a national laboratory. It also says it directly powered an Nvidia Blackwell, which it describes as the first AI chip powered by a nuclear reactor. Technically, Valor is building a TRISO-fueled, helium-cooled, graphite-moderated SMR with passive post-scrum cooling, a modular precast-concrete bioshield assembled in about 42 hours, and unusually aggressive in-house integration such as building its own reactor protection system in six weeks for about \$400k after receiving a \$5M and 2.5-year vendor quote. [6]
- **Seraph is an experimental but notable autonomy signal.** Its developers say that after clearing all goals and taking the system offline, the agent used a resident local qwen2.5:3b model to identify a missing capa-

bility, generated a Python implementation for file and database metadata extraction, validated it in a sandbox, and promoted the new skill into its permanent canon without an external prompt. They describe the current system as “Seraph Mark I,” a fully autonomous, offline, self-coding intelligence that is still early. [7]

- **getshorts.ai shows the systems engineering behind reliable zero-input AI video.** Its “UGC Auto Mode” takes a one-sentence product description and coordinates LLMs, TTS, image and video generation, lip-sync, and assembly across a strict dependency chain. The team says reliability came from a node-cached state machine for partial retries, an audio-stretching layer that aligns lip-sync within 15ms, and a visual-consistency system that carries style and subject embeddings across scenes. Reported operating metrics are a 94.2% first-run success rate, 4.5-minute average render time, and 82% auto-recovery. [8]

#### 4) Market Signals

- **Energy abundance is increasingly being framed as the prerequisite layer for AI scale.** Scott Nolan argues that baseload power demand has expanded dramatically, partly driven by AI, and that the bottleneck has shifted to enriched uranium. Isaiah Taylor makes the same demand-side case from the reactor side, saying AI compute is increasing power demand and that cheaper energy will create still more demand. [2, 6]  
“If you can figure out how to make energy cheaper, you will have demand.” [6]
- **Model routing is hardening into an infrastructure category.** The driver is large price dispersion: The Pragmatic Engineer notes 10-20x token cost differences between average and frontier models. Vendors already shipping routing layers include Factory Router, which claims 20-25% savings, Not Diamond at around 30%, Prism for coding tasks, Morph’s Model Router, and Weave’s split between frontier and open-source models. The same piece describes demand as extremely high and expects intelligent routing to become table stakes. [9]
- **Application-layer AI is sending mixed GTM signals.** One AI SaaS founder says four months of demo-call sales produced only three customers, while removing the demo requirement and adding a free trial led to eight signups and one highest-plan upgrade in three days. Separately, a founder on r/SaaS argues that LLM-assisted “vibe-coding” is saturating niches, raising ad costs, and eroding SEO with AI-generated content. These are anecdotal datapoints, but they point to a tougher distribution environment and higher value for self-serve onboarding. [10, 11]

## 5) Worth Your Time

- **No Priors interview with Isaiah Taylor** — the best source in this set for startup nuclear execution: first-power claims, passive-safety design, aggressive vertical integration, and the argument for using risk-on equity cap-



ital before project finance. [6]

*How Nuclear Will Unlock Energy Abundance with Valar Atomics Founder Isaiah Taylor (35:04)*

- **America's Next 250** — useful for understanding why some investors now see fuel-cycle infrastructure, not just reactor companies, as AI-enabling infrastructure. [2]
- **The Pulse: a new trend, smart model routing** — one of the cleaner overviews of the new routing layer, with vendor examples and a simple reason the market exists: model prices can differ by 10-20x. [9]
- **Runway thread** — a concise demo of coherent video generation from a single long audio file. [12]

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## Sources

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