Agentic Security Funding, Scientific AI Progress, and New Early-Stage Signals

VC Tech Radar

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Two fresh Series A rounds point to rising conviction in agentic security and SMB AI infrastructure. Elsewhere, the strongest signals are coming from scientific AI, grounded answer engines, grassroots developer traction, and macro data on GenAI revenue, compute deployment, and biotech deal flow.

Funding & Deals

- **Stryker — $64M Series A.** Lightspeed-backed Stryker is building agentic security: it finds AI agents inside a business, tests them for weaknesses before they go live, and monitors them after deployment. The underlying thesis is that rule-based security tools were not designed for software that makes its own decisions. [1]
- **Pie — $19.5M Series A.** The New York company, founded by operators from R-Square and Toast, is building three SMB-facing products: AI search visibility for surfaces like ChatGPT and Perplexity, growth/customer acquisition tooling, and an AI receptionist. Its stated ambition is to become the infrastructure layer small businesses run on. [1]
- **Deal-flow note: Standard Capital opened its latest Series A cycle.** Applications close July 21, with responses by July 31. More information is at standardcap.com. [2, 3]

Emerging Teams

- **Repowise has the clearest bottom-up developer traction in this set.** Its founder previously built internal LLM systems, including a

multi-agent platform used across a company, then launched an open-source "codebase intelligence layer" for AI coding agents. In roughly three months, Repowise reached 3.2k+ GitHub stars and around 50k PyPI downloads with no outbound, and enterprise interest came inbound. GitHub [4]

- **A niche healthcare AI platform is worth tracking for domain depth and distribution.** The founder has nearly 20 years in elective healthcare and says the team has already shipped seven tools on an EMR-agnostic, enterprise-ready platform. The next step is a shared-revenue app store / agent exchange for cash-pay specialties where education, imaging, follow-up, and conversion meaningfully shape demand. [5]
- **AIWave is an early signal around demand for Chinese model access.** The solo founder built an OpenAI-compatible API for 45+ Chinese models, including DeepSeek, Qwen, GLM, Kimi, and MiniMax, and reports 100 organic users in two weeks with no paid marketing. [6, 7]
- **AGI Inc. shipped an early Android phone agent.** The product takes voice commands and then taps, scrolls, types, opens apps, and moves through simple flows on the user's behalf. The team says the hard part has been generalizing across real Android apps where every UI is different. It is early and free to try at agi.app/android. [8, 9]

AI & Tech Breakthroughs

- **Brain2QWERTY is the most striking step-change here.** Meta FAIR's non-invasive MEG system reconstructs typed text from brain signals in real time, reaching 61% average word accuracy and 78% for the best participants versus roughly 8% for prior non-invasive methods. Meta frames it as a path to help people with brain lesions communicate, while the same discussion points to early policy responses such as Chile's neural-rights protections and draft employment restrictions in France and Germany. [1]
- **Scientific AI is becoming more workflow-specific.** Anthropic's Claude Science beta is described as an AI workbench for scientists with 60+ integrated tools and databases, compute access, and auditable artifacts, while OpenAI's GPT Rosalind is a purpose-built biology and drug-discovery model optimized for chemistry, protein engineering, and genomics and deliberately hard to access. DeepMind's AlphaFold family is already reported as helping more than 3 million researchers. The commercial target is a drug-discovery process described here as costing around $2.6B and 10-15 years per new drug. [1]
- **AI-assisted digital labor improved again.** Fable 5 now completes 16% of real freelance projects at human-professional quality, about double the previous best on the Remote Labor Index. [10]

- **Smaller models continue to pressure scale assumptions.** A 35B-parameter model trained with a new approach matched 1T-parameter models on some long-horizon benchmarks. [10]
- **Wet-lab automation is getting more concrete.** In a near-autonomous loop, GPT-5.4 helped Molecule.one run 10,080 reactions and increased average Chan-Lam yields by around 50%. [10]

Market Signals

- **GenAI revenue is now large enough to matter at ecosystem scale.** One bottom-up, deduplicated estimate puts consumer and enterprise GenAI spending at $110B over the last 12 months, with an annualized run rate above $175B. The same thread points to a major inflection around last year's brief bear-market downturn. [11, 12]
- **A large compute wave still has not reached production.** More than 95% of Grace-Blackwell GPUs remain undeployed even though the chip has been shipping since December 2024. [10]
- **Biotech deal flow is shifting geographically.** Chinese biotech licensing deals, including AI drug-design deals, are up 87% year over year in the first five months of the year. [10]
- **Evaluation infrastructure is monetizing quickly.** In one interview, Arena was described as having crossed $100M in annualized revenue within eight months of launch and as becoming integral to AI workflows. [1]
- **Investor heuristics remain people-first, with context as a moat.** Mike Mignano says he has flipped from "product, market, founder" to "founder, market, product" and highlights communication as a recurring diligence miss because it affects recruiting, fundraising, internal alignment, and storytelling to the market. In the same discussion, he argues that AI products become harder to displace once they accumulate rich organizational context, making speed and early adoption especially important. [13]

Worth Your Time

- **Lightwork on Brain2QWERTY, scientific AI, and Arena** — one episode covering Meta's brain-to-text system, Anthropic's Claude Science, OpenAI's GPT Rosalind, and Arena's growth. YouTube [1]

Meta Can Read Your Brain, The AI Science Race & AI Ranking With Ion Stoica | Lightwork (3:28)

- **Aravind Srinivas on grounded answer engines** — the Perplexity CEO, previously a Berkeley PhD and researcher at DeepMind, Google, and OpenAI, explains the company's answer-engine architecture: retrieve links, extract relevant paragraphs, and instruct the model not to say anything it did not retrieve. He also walks through hybrid retrieval, Sonar post-training, and latency engineering. YouTube [14]

  "The principle in Perplexity is you're not supposed to say anything

that you don't retrieve." [14]
#434 – Aravind Srinivas: Perplexity CEO on Future of AI, Search & the Internet (125:42)

- **Exponential View's weekly data brief** — a compact set of datapoints on undeployed Grace-Blackwell capacity, freelance-task automation, small-model efficiency, wet-lab progress, and Chinese biotech deal flow. Essay [10]
- **Harrison Chase on LLM Wikis** — a short thread worth scanning if you're tracking agent memory; OpenWiki reached nearly 7k GitHub stars in less than a week. Thread [15]

Sources

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