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VC Tech Radar

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An investor-focused scan of the strongest early-stage AI signals in the latest notes: Inherent's stealth debut, GigaML's enterprise traction, new product wedges in wealth and design software, a notable sparse-attention breakthrough, and market evidence on open models, AI capex, and AI-native org design.

Funding & Deals

- **Inherent** emerged from stealth in the UK with a reported ~**$50M (£40m) raise**. The ex-DeepMind team says it will pursue AI science research and build lab capabilities to accelerate foundational work and commercialization. [1]
- **GigaML** raised a **$4M seed** after open-sourcing fine-tuned LLMs that topped Hugging Face benchmarks. The company says it now builds customer-support agents for DoorDash, one of the biggest crypto exchanges in the world, and top-three telecom providers, with current deflection rates around **60-70%** and a target of **90-95%**. In related operating context, the team says it won DoorDash as an 8-person company against a much larger competitor. [2, 3]
- **Read-through:** the funding in this set clusters around two theses: new AI lab formation and enterprise automation tied to measurable service KPIs. [1, 2]

Emerging Teams

- **DraftedAI** is the clearest traction signal in the batch outside funded companies. YC says the product generates floor plans, elevations, and

3D home designs from simple inputs, and that **120,000 users** created **325,000+** home designs in one month. Founder: **@PrimalNick**. [4, 5]

- **Wealor** is a vertical-AI watchlist name for wealth-tech: an AI-native platform for wealth managers positioned as a centralized source of truth across wealth management, tax, and legal, with agents automating operational work across legacy systems. Founders highlighted in the launch were **@Pierredpy72** and **@KarimBOURI1**. [6]
- **shift** is testing an unusual robotics-data acquisition model: free apartment cleaning in New York City in exchange for anonymized recordings of how vetted operators perform the work, with the company saying that data value funds the service. It plans to expand into handymen, repairs, and errands. [7]
- **gitdoctor.io** is an early developer-tool signal worth watching. The product ingests user comments and feedback, then outputs prompts to fix code flaws; the founder reports **120+ active users**, daily repo scans, and several real applications already moved to production. [8]

AI & Tech Breakthroughs

- **Dynamic Ultrametric Attention** is the standout technical result. The framework lets a Transformer learn per-head block-sparse routing topologies during training, then transfer those learned sparsity maps directly to a Triton block-sparse kernel at inference. Reported results include **11.59x** wall-clock inference speedup at 2048 tokens, scaling to **28x** at 8192 tokens, **98.4%** memory reduction, and a sparse PagedAttention decoding kernel with **8x** effective memory bandwidth. The authors also report that early layers discover hierarchical parsing while later layers handle dense aggregation, and that the system maintains **>88% sparsity** on natural language while reducing loss from **10.9 to 1.55**. [9]
- **Moss** is targeting a specific voice-agent bottleneck: retrieval latency. Garry Tan highlighted the company's claim of **sub-10ms** search with no network hop, framing retrieval as the missing layer for fluid conversational agents; the stack is open source. [10]
- **Layzer** shipped OAuth support for MCP apps, allowing users to securely sign into external tools without copying API keys. In the founder's framing, that unlocks useful catalog integrations such as Gmail, Linear, and GitHub; next steps are developer self-registration and crawling public MCP repos. [11]

Market Signals

- **Open-weight adoption is accelerating.** LangSmith Signal says **1 in 3 AI teams** ran an open-weights model in April 2026, up from **1 in 5** nine months earlier, with the overall number of teams using open weights up **3x**. Newer users are adopting open models at higher rates than earlier cohorts. [12]

- **The AI capex cycle is broadening beyond equity.** a16z highlighted that hyperscalers are increasingly funding the AI capex buildout with debt; Marc Rowan argues equity cannot fund the whole cycle, and another cited datapoint says IT capex is approaching **40%** of all capex in the S&P. [13, 14, 15]
- **AI-native org design is hardening into a founder playbook.** Garry Tan calls this the biggest shift in startup building since cloud computing and argues founders should spend tokens rather than headcount, record everything, and build self-improving loops. GigaML offers a concrete operating datapoint: it says the company would need roughly **6-7x** more engineers without coding agents. [16, 2]

  "My advice to founders in 2026: spend tokens, not headcount." [16]

- **One small-company distribution signal:** TrunkTransfer says all three of its first paying customers came from **Claude, ChatGPT, and Perplexity**. [17]

Worth Your Time

- **YC Startup School India interview with GigaML's Varun Vummadi** — useful for assessing founder ambition, pivot discipline, and how a small technical team sold into DoorDash. [3, 18]

Why Two IIT Engineers Turned Down $550K Jobs To Build A Startup (9:36)

- **Garry Tan on AI transformation** — concise operator guidance on AI-

native company design: tokens over headcount, queryable companies, and self-improving loops. [16]

- **LangSmith Signal on open-weight adoption** — a fast read on open-model share growth and cohort-level adoption differences. [12]
- **Dynamic Ultrametric Attention summary** — worth scanning if you are mapping sparse-attention infrastructure and long-context inference economics. [9]

Sources

1. r/artificial post by u/Objective_Farm_1886
2. Why Two IIT Engineers Turned Down $550K Jobs To Build A Startup
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