

# Nano Claw's Seed, Anthropic's Stack Moves, and New Vertical AI Wedges

VC Tech Radar

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*By VC Tech Radar • May 23, 2026*

Nano Co's seed, Anthropic's Stainless acquisition, and 20VC's UsePrelude bet anchor this brief. It also surfaces promising teams in health, legal, robotics, and agent commerce, plus the clearest market signals on vector stores, AI cost control, and small-team leverage.

### Funding & Deals

- **Nano Co / Nano Claw: \$12M seed over a \$20M buyout.** The brothers-founded company positions Nano Claw as a secure alternative to OpenClaw. The round was led by Valley Capital Partners, with the Hugging Face CEO participating as an angel after reaching out over social media. TechCrunch also notes that Andrej Karpathy's support helped draw attention and investment to the company. [1]
- **20VC wrote a \$15M check into UsePrelude.** Harry Stebbings frames the bet around founders Matias Berny and @Zibra\_, a market shaped by more apps and more security threats, and fund-returning upside. He also says the company has signed one of the largest social networks and e-commerce players and is already doing many millions in ARR. [2]
- **Anthropic bought Stainless for a reported ~\$300M and hired Andrej Karpathy.** TechCrunch describes Stainless as automated SDK/API tooling that every AI lab wants when scaling agents. Anthropic had already been using the product internally, making the acquisition a strong signal that key agent-stack tooling is being pulled in-house. [1]

## Emerging Teams

- **Juno is one of the clearest early distribution signals in this batch.** The company is building an AI personal health assistant for chronic illness. Founders @isaactolley\_ and @marshalljgould grew up with chronic conditions themselves, and YC says Juno is already supporting 80,000+ people globally six months in. [3]
- **Symphony is attacking agricultural labor with a robotics wedge that already looks economically legible.** YC says the company deploys robots to pick strawberries in a California market worth \$3B, where labor is 60% of cost and the workforce is shrinking. The company says robots have now reached the crossover point with field labor, with strawberries as an entry point into a \$15B berry market. Founders are Sean Wu and Saichi Fujimoto. [4]
- **A new law-firm research assistant is a credible vertical AI wedge to watch.** The founder is an ex-bigtech engineer who started building after a layoff. The product searches a firm's own document library from plain-English questions, returns answers with exact citations, weights legal authority, surfaces conflicting sources, and lets senior lawyers add durable annotations. There are no clients yet, but repeated law-firm conversations are validating the pain point, and the product is being designed for local hosting because security matters to attorneys. [5, 6]
- **YC's latest launches also show a widening agent-commerce stack.** Allowance lets AI agents make purchases with one-time virtual cards and built-in guardrails. HessianHQ forward deploys into businesses to map work before building, operating, and scaling agents. Amboras says its end-to-end ecommerce automation is already producing 80%+ conversion-rate lifts for early merchants. [7, 8, 9]

## AI & Tech Breakthroughs

- **Guardrails are becoming standalone agent infrastructure.** Nano Claw focuses on safer agent execution as a secure alternative to OpenClaw, while Allowance focuses on safe agent payments through one-time cards and purchase guardrails. The common pattern is notable: autonomy is creating new products around operational control, not just smarter models. [1, 7]
- **Replication Radar is an ambitious attempt to use AI for knowledge verification.** Built by Rhea Karty at Harvard's lab, the system is designed to crawl papers, books, claims, citations, replications, retractions, old debates, and buried null results to check what actually holds up. It is supported by Cosmos Institute and FIRE, and Marc Andreessen separately flagged the project as interesting. [10, 11]

Does this actually hold up? [10]

- **Abinitio Bio is applying foundation-model thinking to biomanufacturing.** YC says the company turns 6-18 month process decisions into hours of compute, with pharma economics measured against \$100M+ per month of delay on blockbusters. [12]

## Market Signals

- **turbopuffer is the strongest contrarian infra datapoint in this batch.** The company crossed a \$100M run-rate in March, 19 months after \$1M, is profitable, and raised less than \$1M. Customers include Cursor, Anthropic, Notion, Cognition, Harvey, Bridgewater, Ramp, Linear, Legora, Superhuman, Atlassian, and Granola. Jerry Liu's takeaway is that even in a commoditized vector-store market, a better product can still win if it makes the right technical bet, in this case optimizing cost through object storage. [13, 14]
- **AI cost observability is turning into an immediate budget-control category.** One startup's SDK for tracking AI spend inside apps passed 1k+ npm downloads and 100+ paying users within days. The feedback clustered quickly around per-user and per-feature cost tracking, Slack alerts, incident replay, and kill switches to stop runaway spend. [15]
- **AI is compressing team-size assumptions.** One 4-person team says it is running multiple products at roughly 600K€ ARR and 35% EBITDA, arguing that AI lets tiny teams do work that used to require 100 people. Separately, a solo founder reports 1,060 registered users, 640 monthly actives, 18 paying subscribers, and 247 AI calls per day with no advertising spend. [16, 17]
- **Some investors are explicitly looking for markets where adoption friction is near zero.** Garry Tan highlighted 9 Mothers, a counter-drone defense company in the YC Spring 2026 batch, as a case where there is no viable close-quarters alternative. [18]

## Worth Your Time

- **TechCrunch's Equity Podcast** — best single watch here for context on Nano Claw, Stainless, and Anthropic's willingness to buy critical agent-



stack tooling. [1]

*SpaceX files to go public, and the math requires a little faith | Equity Podcast (9:50)*

- **Jerry Liu on turbopuffer and the underlying company datapoint** — concise reading on why differentiated infrastructure can still dominate a crowded category. [14, 13]
- **Replication Radar thread** — useful if you are tracking AI-native tooling for scientific diligence and research verification. [10]
- **Harry Stebbings on Joshua Browder** — a compact view into one current pre-seed playbook: founder intensity tests, live revenue verification, and an upfront deployment strategy. [19]
- **Harry Stebbings on UsePrelude** — helpful for how one active seed investor is underwriting product, market, and founder quality in a market shaped by more apps and more security threats. [2]

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## Sources

1. SpaceX files to go public, and the math requires a little faith | Equity Podcast
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3. X post by @ycombinator
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