

Perceptic's \$12M Biopharma Round, Lucis' Series A, and AI's Shift Toward Trust Layers

VC Tech Radar

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Two health-focused AI financings lead this brief, alongside early traction in agent infrastructure, enterprise workflow automation, and regulated operations. The broader pattern is AI moving toward trusted deployment in compliance and business systems while compute, memory, and inference speed remain hard constraints.

Funding & Deals

- **Perceptic** announced a **\$12M round** led by **Air Street** and **Accel**, with participation from **Elder Gull** and angels from AI labs, to operationalize frontier AI systems for biopharma [1]. The founding team includes CEO Tilman after a seven-year stint at Palantir, plus Palantir AIP veterans Martin Copes and Zaki Trache [1]. The company says it is already live in top-20 pharma accounts speeding up critical workflows, and Nathan Benaich framed the timing around biopharma's increased appetite for frontier AI and AI labs turning more attention toward science [1].
- **Lucis** raised a **\$20M Series A** to expand its **AI-driven** preventive health platform in Europe [2]. YC says the company has served **10,000+ customers** across France, the UK, Ireland, and Portugal, delivered **1M+ biomarker tests**, and that **75%** of users who completed a six-month follow-up improved three or more markers without medication [2].

Emerging Teams

- **Superset** is an open-source IDE for developers to run **hundreds of agents in parallel** [3]. YC says it has grown **30% week over week**

for the last four months and is helping engineers ship **10x more PRs** [3].

- **Appnigma** is attacking Salesforce implementation pain by generating **native managed packages from natural language**. The founders say it compresses **3-6 months** of development into days and outputs **100% native Salesforce metadata** [4]. They are ex-Salesforce, including **3.5 years on the AppExchange review team**, and say customers include **Pylon, Warmly, UserEvidence**, and roughly **85% YC companies** [4].
- **Alchemize** is building an **AI-native customs brokerage** that promises importers **real-time regulatory clarity** and shipment clearance in **minutes instead of days** [5]. YC highlighted the launch from founders **Samuel and Robert** [5].
- **NavigateAI** gives Eric Wu a new wedge in labor-constrained physical work. The company says it wants to give every field worker an **AI copilot** to address skilled-worker shortages so crews can **build faster and better** [6]. Keith Rabois amplified the launch, calling it “Super cool” and emphasizing faster, lower-cost building [7].

AI & Tech Breakthroughs

- **DeepSWE** is positioned as a new benchmark for **agentic coding**. Its creators say it shows where top models actually diverge in realistic developer workflows, and Garry Tan called it **the new standard for engineering evals** [8, 9].
- **GBrain + ActiveGraphAI** outline a more auditable agent architecture. The system pairs a durable markdown/git knowledge substrate with an event-sourced runtime, then wraps operations as typed events, projects retrieved evidence into graph state with stable citation tokens, adds an explicit **propose/approve/apply** flow, and **forks before mutation** so agents can trace recommendations to specific evidence and runs [10].
- **StableBrowse** is a concrete attempt to improve agent browsing economics. YC says its browser layer lets agents navigate the web with **70% fewer tokens** and **3-4x faster execution** [11].
- **YourMemory** is a notable open-source experiment in persistent AI memory. Its author says the system adds **time-aware retrieval** and **memory decay** based on a modified Ebbinghaus forgetting curve, tested it on **LongMemEval**, and runs it locally with a visualization dashboard [12].

Market Signals

- **Compute still looks supply-constrained rather than speculative**. In a 20VC interview, Cerebras’ CEO said data centers cannot be built fast enough, the company has a **\$25B backlog**, and Nvidia, AMD, and others also have backlogs [13]. He argued the industry is building **behind demand**, not ahead of it [13]. In the same interview, he said **HBM**

shortages could last **several years** because fab capacity is lumpy and slow to add, and that **electricity** may become the longer-term limiting factor [13].

- **Compliance is starting to look like a real AI software category.** a16z says AI may finally be moving from **good enough to pilot** to **good enough to trust** in compliance, noting that many LLMs now score **80-100%** on LegalBench’s **162 legal reasoning tasks** [14]. The firm argues compliance is essentially **applied legal reasoning** and affects every dollar moving through a business [14, 15].

“As AI clears the ‘good enough to trust’ bar and sales cycles speed up, there may finally be an opening for startups.” [15]

- **AI is beginning to replace legacy SaaS, not just sit on top of it.** Harry Stebbings highlighted a CEO saying the company replaced a **\$600K Salesforce contract** with a **vibe-coded CRM** built in **three weeks**, expects to eliminate **80%** of its internal SaaS stack, and would not change Anthropic usage even if pricing doubled [16].
- **On-device inference is moving from theory to production design choice in B2B SaaS.** A founding team at an on-device AI infrastructure company says its system handles **60-80%** of requests locally with cloud fallback, especially for bounded tasks like **transcription, summarization, and classification** on modern hardware [17].
- **Agent governance is hardening into an infrastructure layer.** GBrain + ActiveGraphAI describe replay, stable citations, controlled write-back, and fork-before-mutation workflows [10]. Synapsor is built around **governed memory, staged writes, replay, permissions, and audit trails** for agents touching business systems [18]. Nexus Synapse makes a similar argument that runtime governance, not just the model, is the missing layer around AI systems [19].

Worth Your Time

- **20VC x Cerebras CEO:** useful primary source on AI infrastructure bottlenecks, HBM scarcity, and the argument that slow inference has no real



market. YouTube interview [13]

Cerebras CEO on the Future of Data Centres, Token Costs & Memory / Should US Companies Sell to China (19:46)

- **a16z on compliance:** useful if you are mapping where AI may move from pilots into trusted production software. Essay [14]
- **DeepSWE release thread:** worth reviewing if you diligence coding agents or developer infra and want a benchmark tied to realistic workflows. X thread [8, 9]
- **Superset launch page:** useful background on an open-source IDE that YC says has grown 30% week over week for four months. YC launch [3]
- **GBrain x ActiveGraphAI thread:** useful diligence material if you care about evidence-linked, replayable agent systems. X thread [10]

Sources

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