

Petual and Glif Raise as DeepSeek and GStack Push the Agentic Stack Forward

VC Tech Radar

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New rounds landed in compliance automation, creative tooling, security, and ocean infrastructure, while YC launches added fresh traction in logistics, insurance, recruiting, and commerce. On the technical side, GStack became a reference point for agentic development workflows, DeepSeek pushed long-context efficiency, and the market kept shifting toward application-layer moats and AI-native efficiency.

1) Funding & Deals

- **PetualAI — \$20M total.** Petual raised \$20M total, including a \$17M round led by a16z and a \$3.2M round led by First Round, with participation from Cowboy Ventures, Elad Gil, and founders from Lyft and Open-door [1]. Founder Snir Kodesh previously led engineering at Retool and held senior engineering roles at Lyft [2, 1]. The company applies agentic AI to SOX testing and internal audit, autonomously gathering evidence and generating auditor-ready workpapers in minutes rather than hours; it says S&P 500 and NASDAQ 100 customers see 68–80% efficiency gains [1, 2]. a16z’s thesis is that SOX is the entry point to a broader AI-powered control system for audit and compliance [2].
- **Glif — \$17.5M seed.** Glif announced a \$17.5M seed led by a16z and USV [3, 4]. It positions itself as a creative super agent that uses virtually every available AI model to create ads, marketing content, films, voiceovers, music, and more inside one conversation [3, 4]. a16z’s angle is workflow consolidation: marketers often touch multiple gen-AI products in a single session, while Glif tries to collapse that sprawl into one agent; the founding team is described as strong across both technical and creative

domains [4].

- **Mindfort — \$3M seed.** Mindfort raised a \$3M seed to build autonomous security agents that run pentests on every CI/CD push, chain vulnerabilities into working proofs of exploit, and ship fixes as pull requests [5].
- **Ulysses / The Ocean Company — \$46M.** Ulysses raised \$46M led by a16z American Dynamism to build ocean infrastructure and treat the ocean as a permanent economic fixture [6]. Its stack combines \$50,000 Mako AUVs, which the company says are 10x to 100x cheaper than incumbent models, with the Leviathan surface craft and Kraken launch/recovery platform for persistent subsea operations without crewed ships [6]. Management says demand is already appearing at fleet scale, with one commercial customer requesting 10,000 vehicles and another at least 1,000 [6].

2) Emerging Teams

- **Dayjob.** YC says Dayjob is building AI scheduling for waste trucks and is already at \$496K ARR with 12 customers [7].
- **Huscarl.** Huscarl is pitching an AI-native advisory model for corporate insurance buyers, with a claim of 30% savings on annual premiums and zero downside [8].
- **Asendia AI.** Asendia AI builds AI recruiters for staffing agencies and enterprises by cloning top recruiters into agents that match, screen, and submit candidates 10x faster [9]. YC highlighted founders @LajmiRihab and @zormati_ba at launch [9].
- **Kinect.** Kinect is turning e-commerce stores into AI-powered storefronts that adapt to each visitor in real time and capture new buying-intent data for merchants [10].

3) AI & Tech Breakthroughs

- **GStack is turning into a fast-growing open-source agent-coding toolkit.** Garry Tan's toolkit turns Claude Code into an AI engineering team with specialist skills such as Office Hours, adversarial review, design-shotgun, browser QA, and parallel PR workflows [11]. Tan says the scaffolding should stay thin, describes the result as a level-seven software factory rather than full autonomy, and says the repo was built three weeks earlier and had already crossed 70,000 GitHub stars [11]. In practice, he says he runs 10 to 15 parallel Claude sessions and can land 10 to 50 PRs in a day across projects [11].

“Basically, I’ve written a lot of code in my career and I’m here to tell you we are in a completely new era of building software, the agent

era.” [11]

- **DeepSeek is making a new long-context efficiency push.** DeepSeek says V4 introduces token-wise compression plus DSA (DeepSeek Sparse Attention), delivering world-leading long-context efficiency with sharply lower compute and memory costs and making 1M context the default across official services [12]. Adoption signals were immediate: DeepSeek-V4-Pro cleared 500+ likes on Hugging Face in 28 minutes and reached #1 trending after 43 minutes [13, 14]. Early outside commentary described the first benchmark numbers as “astounding” and comparable to top frontier models, but verification was still underway [15].
- **Replit is targeting the post-codegen security gap.** Replit argues AI has already automated most of the software development lifecycle, leaving DevSecOps as the next bottleneck, and launched Auto-Protect as a 24x7 vulnerability scanner for live apps [16]. Replit frames it as the next step after Replit Agent: extending AI from building software into monitoring, security, and upkeep [17].
- **Model-native interfaces are being prototyped.** Flipbook streams every pixel on screen directly from a model, with no HTML, layout engine, or code, and applies the same idea to video by generating each frame live without timelines, compositors, or render farms [18, 19]. The prototype was built by @zan2434, @eddiejiao_obj, and @drewocarr [18].

4) Market Signals

- **AI-written code has already crossed the 75% line in important startup and big-tech cohorts.** Paul Graham says YC startups passed 75% AI-written code at least one or two years ago [20]. A separate data point cited this week says Google went from 0% to 75% AI-written code in roughly two years [21].
- **More of the commercial logic is shifting to the application layer.** Latent.Space describes an agent-lab playbook: start with frontier models, specialize for a domain, then train or distill your own model once workload and user data justify the cost and latency gains [22]. Aravind Srinivas makes the market version of the same argument: consumers buy products, pure model/API businesses are hard to defend as model gaps compress, and value accrues in the application layer and its harnesses [23].
- **Efficiency heuristics are tightening for AI-native SaaS.** Team8 managing partner Alon Huri argues that AI-native companies are already hitting \$2M to \$5M in ARR per employee, and that headcount growing linearly with MRR is often a sign the company is acting more like an agency than software [24]. His pre-PMF template is a four-person core team and an agent-first model where humans judge while agents execute tasks in sales, customer success, and ops [24].

- **LLMs are becoming both a distribution surface and a monitoring surface.** ReqRes says it has 48,000 registered users and 300 daily signups with no paid marketing; ChatGPT is already its third-largest traffic source, and it says 333 universities teach with the product while 100+ engineers at one Big 4 IT services firm signed up on their own [25]. Lima is building around the inverse problem: tracking how brands are mentioned across ChatGPT, Claude, Grok, Google AI, and Perplexity, with prompt suggestions plus prompt and citation breakdowns [26].
- **Founders are still distinguishing task automation from AGI.** Garry Tan called openclaw “highly effective task-automation” and “genuinely impressive and useful,” but said AGI would require zero-shot identification and solution of novel, unscoped problems without human setup [27, 28].

5) Worth Your Time

- **GStack walkthrough:** How to Make Claude Code Your AI Engineering Team shows Office Hours, adversarial review, design-shotgun, browser QA, and parallel PR workflows in one system [11].



How to Make Claude Code Your AI Engineering Team (0:40)

- **Ocean thesis:** The Great Blue Frontier lays out Ulysses’ thesis, the Mako/Leviathan/Kraken stack, and the early demand signal for 1,000–

10,000 vehicle fleets [6].

- **Agent-labs framework:** AIE Europe Debrief + Agent Labs Thesis covers the frontier-model to domain-specialized to in-house-model playbook, coding-market scale, and the idea of zero-human-review “dark factories” [22].
 - **Security agents:** Mindfort’s seed announcement outlines a product that moves from autonomous pentesting to shipping fixes as pull requests [5].
 - **Production agent architecture:** Max Agency with ListenLabs CTO Florian Jue discusses self-reviewing subagents, sandboxes, abstractions, and response analysis at scale [29].
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Sources

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