Scalata Q2 Newsletter (2025)
Fueling Growth: Announcing Our Pre-Series A and Major Milestones in Product release and Customer Onboarding

A Message from Our Team
Welcome to our Q2 2025 update! Welcome to your Q2 update from Scalata.ai! The past quarter has been a period of unprecedented growth and validation for our team and our vision. Building on the momentum from Q1, we have accelerated our market traction solidified key strategic partnerships, and achieved significant technical breakthroughs.We are incredibly excited to announce two major developments:

Second, our commercial success continues to surge, having achieved $120k in Annual Recurring Revenue (ARR) as of May, with a robust pipeline projecting significant growth throughout the rest of the year. This quarter's achievements, from being named a Top 8 Finalist in the Databricks Startup Challenge to publishing our research in the prestigious Structured Finance Journal, are a direct result of our team's relentless innovation and our partners' trust. We are redefining what's possible in financial and credit markets, and we're just getting started.

Market Traction & Client Success:
Our market presence has expanded significantly across both the USA and Europe. We are proud to welcome Sierra Mortgage Capital and Vivi Banca to the Scalata.ai platform, demonstrating our solution's value across diverse financial sectors. The success from our presence at the SFA Vegas Summit has translated into a powerful sales pipeline, with over 60 positive customer prospects currently in contract and subscription negotiations. This strong demand validates our product-market fit and positions us for exponential growth, with a forecast to reach nearly $10 million in ARR by the end of 2025

Strategic Growth: Fundraising and Partnerships
To power our next phase of expansion, we have launched our Pre-Series A fundraise. Our goal is to raise 10 million in the next 3 months, as part of a larger Series A round by the end of 2025. This capital will be instrumental in accelerating our product roadmap, expanding our data engineering and sales teams, and cementing our position as a market leader. Our partnership with Databricks has been a key catalyst for our growth. As a Databricks Built-On Partner, we are leveraging their ecosystem to provide seamless, powerful, and scalable AI solutions. This collaboration allows us to offer our AI Agents as an entry point for Databricks' top customers, revolutionizing everything from deal origination to portfolio optimization.

🚀 Market Traction:

Active deployments across multiple financial institutions

Paid pilots with top tier US Hedge Funds and Banks

Become in February 2025 a Databricks Startup and started a new migration

Become in March 2025 a Databricks Built on Partner and initiated a GTM with key accounts to allow for entry points into their top customers across financial institutions

Currently running 2 proof of concepts with Large global financial institutions

Scalata.ai solution is now available for USA and European customers with Compliant data frameworks

Onboarded two new customers Sierra Mortgage Capital and Vivi Banca

💼 Client Success:

At the Structured Finance Association Vegas Summit we successfully excelled in a Tech Demo and more than 100 one to one demos with top financial institutions

Retained customers at the SFAVegas with a pipelines of more than 60 positive customer prospects currently in progress of contract and subscription negotiations.

Active and experienced Sales team educating target customer base on main benefits of GenAI framework across their organizations

Incorporating change requests and feedback from customers for additional product roadmap capabilities, deployed several changes.

Engaging and implementing strategies with top executives at banks and funds that exceed $500B AUM

Attending Databricks AI Summit June 9th to 11th in San Francisco with finance one to one meetings set up and beyond

Launching additional Databricks Webinars for enhanced company visibility

Built the broker/agent network with 6 with top industry leaders

🏢 Team Growth:

Moved to larger office space in New York

Hired 2 Engineers in New York

Hired 1 Data Scientist in Croatia

Opened formally our R&D capabilities in Croatia

Hired a new Sales Director Chris Salisbury

Actively hiring 2 Senior Data Scientist

Actively hiring a US Head of Sales

Actively hiring a US product manager

Growing customer success team

💻 Technical Achievements:
Created a brand new Agentic Architecture on Databricks

Launched pioneering Chat Playground with multi-format processing handling Big Data

Implemented First SQL Agent

Deployed AI Data Governance framework

Released portfolio management widgets

Deployed advanced Data Marketplace APIs plug and play models

📣 Industry Recognition:
Published our White Paper on the SFA Journal on Generative AI Financial Metadata SFA White Paper

CEO Bruno Lorenzelli selected as panelist at SFA Vegas

Team showcase booth at SFA Vegas Forum (February 23 – 26)

Expanding presence at major industry events such as the Databricks AI Summit

Technical Demo by team on Monday 24th February SFA Vegas Forum

Technical Achievements:
The Agentic Architecture & The Future of Data
Our R&D team in Croatia and New York has delivered groundbreaking technical advancements this quarter. The centerpiece is our

new Agentic Architecture built on Databricks. This framework is a paradigm shift for financial data analysis, enabling us to deploy specialized AI agents that automate complex tasks.

Key achievements include:

Implemented our First SQL Agent: Allowing for natural language querying of complex structured data.

Implemented an Orchestrational Agent Framework responding to on demand customer's requirements.

Launched a Pioneering Chat Playground: Supporting multi-

format data processing to handle the full spectrum of financial documents.

Deployed an Industry-First Data Mapping Tool: Using Generative AI to automatically map and harmonize any data schema, eliminating a major source of friction in data integration.

Released Advanced Data Marketplace APIs and Portfolio

Management Widgets, giving users plug-and-play models and enhanced control.

Navigating the Evolving Landscape Cloud-Native AI at Scale
Microsoft Azure+OpenAI & Azure AI Foundry: Azure
continues to be a market leader, with AI services such as Azure OpenAI and Copilot delivering 157–175% growth YoY. Azure is scaling across 19,000+ Fabric customers with strong enterprise usage— supporting GitHub Copilot,M365 Copilot, and custom AI agents via Copilot Studio ainvest.com

Databricks Data Intelligence & Neon Acquisition: Databricks enhances its lakehouse via integration of generative AI tools (MosaicML, Anthropic),recently acquiring Neon for 1B—enablingvricher AI agent support and database handling in one unified platform v-Databricks + Neon

Snowflake Cortex & Crunchy Data Integration: Snowflake's Cortex adds LLM support, vector search, and agent frameworks directly within its Data Cloud. With the Crunchy Data acquisition (~$250M), Snowflake is extending PostgreSQL-based endpoints and flexible pricing strategies for AI-driven pipelines – Snowflake Integration

Intelligent Agent Frameworks: Top infrastructure vendors now offer AI agent ecosystems—developers can deploy autonomous or human-in-the-loop bots for finance tasks. Microsoft enables this through Copilot Studio and Dynamics agents. Databricks and Snowflake provide embedded agent management over enterprise data. These frameworks support everything from document processing to complex analysis workflows

Multimodal & Real-Time Analytics: Integration of LLMs with vector search, real-time streaming, and table Analytics is advancing. Snowflake Cortex supports Llama 3.1 and other multiformat models, while Databricks offers embedded vector search and model serving in its lakehouse – Embedded Lakehouse

Microsoft is optimizing its AI infrastructure to support Copilot for finance workflows—connecting Excel, Outlook, and enterprise ERP via secure, load-balanced Azure GPU infrastructure – Microsoft Workflow Infrastructure

Infrastructure investment is surging: Microsoft is investing $80B in AI-enabled data centers in FY 2025—including $400M in Switzerland—to improve performance and meet compliance needs Infrastructure Investment

Efficient data processing enhancements: Snowflake's research (e.g., selective partition pruning) demonstrates 99%+ efficiency gains in large-scale workloads, helping reduce compute costs and speed up analytics – Data Processing Enhancements

Looking Ahead: Q3 and Beyond
Our focus for the second half of 2025 is clear:

Strategic Growth: Successfully close our Pre-Series A round and strategically deploy capital to scale the team and platform.

Product Development: Expand our Agentic Architecture with new capabilities for predictive analytics and portfolio optimization, and deepen integrations with existing financial systems.

Customer Expansion: Convert our strong pipeline into new partnerships and continue our expansion across North America and Europe

Workshops:
March and April 3 part workshop from March to April about GenAI in Finance. Comprehensive workshop about RAG chatbot from data ingestion, processing to agent creation and evaluation.

Upcoming Relevant Industry Events
Money20/20 USA

FinovateFall

American Banker Digital Banking

CXFS (Customer Experience for Financial Services)

PDI New York Forum 2025

LEND360

AFP 2025

SuperReturn Private Credit North America

RegTech Summit New York

CRE Private Credit Finance Summit

SIFMA – NATIONAL CONFERENCEON THE SECURITIES INDUSTRY

Experience Scalata.ai
Ready to see how Scalata.ai can transform your credit analysis workflow? Our platform offers:

Cutting-edge AI analysis capabilities

Seamless integration with existing systems

Industry-leading security and compliance

Dedicated support team