Scalata.ai Quarterly Newsletter (Q3 2025)

A Message from Our Team

This quarter, Scalata.ai has achieved significant milestones. We are now recognized as a top Databricks Partner through both the Built on Program and the Data Provider Marketplace. Additionally, we are finalizing a strategic partnership with a leading global bank.

We have introduced substantial platform enhancements, including advanced agentic UI and backend agent capabilities. A major update is imminent, featuring our next-generation, fully automated agentic AI. Scalata.ai has been highlighted in prominent Databricks webinars and financial industry podcasts, and was recognized by The Digital Banker's Global Banktech Awards 2025 as the:

'Best Gen-AI Financial Markets Solution by a Vendor'.

🚀 Market Traction & Client Success

Our annual recurring revenue (ARR) has grown to $120K. Scalata.ai has generated over 30 new opportunities across three continents, with major deployments in the US, EU, and Brazil. We have successfully implemented custom data pipelines and generative AI schema mapping for diverse client needs.

💼 Strategic Growth: Fundraising and Partnerships

Expanded partnerships with Databricks in both the Marketplace and Built on Program.
Initiated partnerships with a major global banking leader—one of the largest players in finance AI and total banking solutions.

🏢 Team Growth

Hired a new data scientist from the New Jersey Institute of Technology to further develop our agentic infrastructure.
Added a junior customer service specialist to enhance client support.
Currently recruiting a Sales Director and a Senior Software Engineer.

💻 Technical Achievements

Infrastructure & Deployment

Multi-Cloud Expansion With Azure already integrated, we have launched a new Google Cloud Platform (GCP) environment, alongside AWS deployments currently in progress. Both cloud providers will soon support our offerings across US and EU regions, enabling regulatory flexibility, data locality, and deployment resilience.

Advanced Agent Stack Evolution

🔬 Deep Research Agent Today's financial data is distributed across PDFs, APIs, filings, terminals, and Excel, often siloed and inaccessible. The Deep Research Agent is our purpose-built, self-directed research engine for the modern financial ecosystem.

Key features:

Multi-hop search
Source-aware retrieval-augmented generation (RAG) with memory and caching
Time-sensitive reasoning
Direct Scalata Marketplace API integration
Long-horizon historical analysis

This agent functions as a full-stack financial researcher—crawling, extracting, comparing, and summarizing information from disparate sources. It perpetually builds a live knowledge database, enabling cross-temporal insights and informing downstream agents with high-value, contextualized intelligence.

Use cases include:

Investment memorandum preparation
Credit risk assessments
Regulatory impact analysis
Competitive intelligence
Multi-document synthesis for board-level reporting

With each assignment, it learns and becomes more contextualized, continuously evolving for deeper collaboration across the Scalata agentic ecosystem.

📊 Financial Modeling Agent Engineered for advanced analysis of structured and unstructured data, this agent delivers high-fidelity tabular outputs, layered reporting, and seamless integration with external financial data sources.

📝 Report Agent Purpose-built for generating complex, multi-source financial reports, the Report Agent supports dynamic API calls, structured document assembly, and export-ready output formats.

📦 Widget Farm Agent Our proprietary engine for Generative UI (GenUI) creates intelligent dashboards, forms, and custom input layers. This enables agent-first design for applications within capital markets and finance.

🐍 Python Agent for Quant/DS Workflows This robust, sandboxed execution environment enables power users and analysts to run large-scale statistical models and advanced data science directly from the agent layer.

AI & Model Training

Domain-Specific Model Fine-Tuning We are pioneering vertical AI by fine-tuning domain-specific models with high-quality, partner-provided financial datasets. These are not generic large language models (LLMs); they are engineered for structured finance, credit modeling, asset-backed securities, and macro risk analysis. Our models are built to interpret financial nuances, generate actionable insights, and enable agentic workflows with unparalleled contextual awareness.

Our objective: Create the industry's most finance-fluent foundation models, seamlessly integrated with the Scalata agentic platform.

Scalata Marketplace Enhancements

Tooling Extensibility Agents now dynamically integrate new tools, multi-call pipelines (MCPs), and third-party search connectors from the Scalata Marketplace, supporting modular, enterprise-grade extensibility.

Product Experience Upgrades

Quota Management & Usage Analytics: We have introduced a sophisticated quota management system with per-agent and per-user policies, alongside real-time usage dashboards, ensuring transparent billing and robust system governance.
Simplified UI with Multi-Agent UX: Our frontend has been redesigned around a chatbot-first interaction paradigm, optimizing for real-time engagement with multiple agents, each rendered as a smart widget via our Widget Farm.
📅 Report Widget Our new reporting interface empowers users to create, edit, and schedule reports directly with agent or chatbot prompts—no PowerPoint, Excel macros, or file transfers required.

Key features:

Fully autonomous report generation and manipulation by agents

Workflow scheduling from chatbot-first interfaces
Embedded data retrieval from APIs, databases, and documents
Consistent, visually compelling outputs in Excel, PDF, and HTML formats

This signifies the end of copy-paste finance.

Seamlessly coordinated with the Report Agent, teams can now generate, update, and distribute reports at scale—for investor communications, regulatory filings, or internal reviews. Integration with data warehouses, version control, and email ensures comprehensive workflow support.

🧮 Financial Product Creation Widget (In Development)

A breakthrough for capital markets and fintech: this tool enables financial institutions to design new instruments by blending agents, RAG pipelines, deep research layers, and modeling tools—all with no code required. Our Financial Product Creation Widget is poised to become one of the most disruptive tools in structured finance.

Imagine developing innovative financial instruments, from synthetic credit products to ESG-linked vehicles—not in legacy spreadsheets, but through a coordinated network of specialized agents for modeling, risk structuring, regulatory logic, and market intelligence.

This is more than automation— it is collaborative co-creation.

It combines:

Deep Research Agent (for market landscape discovery)
Domain-tuned RAG (for precedent research)
Modeling Agent (for cash flow structuring)
Marketplace API calls (for real-time pricing, ratings, and risk signals)

Institutions can now ideate, prototype, and simulate new financial products with startup agility while maintaining enterprise-grade compliance. We believe this tool will redefine origination workflows, empowering analysts and structurers to focus on innovation, not implementation.

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📣 Industry Recognition

Top 8 at Databricks Startup Challenge 2025 Scalata.ai was honored as one of the Top 8 startups at the Databricks Conference—a significant validation of our platform's technical sophistication and market impact. This recognition, featured on the official Databricks Blog, underscores the strength of our agent-driven AI framework and its transformative potential in financial workflows.

Structured Finance Association Feature Our research was highlighted in the Structured Finance Journal, signaling increased institutional interest in the application of generative AI within the finance sector.
Thought Leadership Publications

🎯 “How Scalata’s Agent-Driven AI Framework is Revolutionizing Financial and Credit Markets” → Read the article

🎯 “From Hype to Impact: How GenAI Is Reshaping Work—And Where Scalata Fits” → Explore insights

AI Industry Nomination We are proud to be nominated among the leading names in the AI industry, further solidifying our status as an innovator in the fintech and generative AI space. → LinkedIn Announcement

Key Achievements Include:

The Digital Banker Award Winner Scalata.ai’s innovation in financial markets has earned global recognition. The Digital Banker awarded us ‘Best Gen-AI Financial Markets Solution by a Vendor’ at The Global BankTech Awards 2025.

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SOC 2 Type II Compliance Achieved: Security has always been a fundamental value at Scalata.ai. We are proud to announce that we are now officially SOC 2 Type II compliant—a significant milestone demonstrating that:

- Our infrastructure meets the highest standards for security, availability, and confidentiality.

- We maintain independently verified controls, ensuring sustained trust and reliability in data-sensitive environments.

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This certification underscores our continued commitment to customer trust and enterprise-grade reliability. Community Engagement & Outreach Co-Hosted Webinar with Databricks
We partnered with Databricks to explore Generative AI and Financial Frameworks, demonstrating how Scalata.ai enables institutions to build their own agentic AI ecosystems using our end-to-end platform stack.

→ Watch the Webinar

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🎥 Podcast Launch Featuring Bruno Lorenzelli and Chris Salisbury, our latest podcast offers in-depth discussions on: Transformative GenAI strategies in finance Building scalable, secure frameworks Global perspectives on lean fintech growth → Listen to the episode
Outdoor Campaign on Wall Street We have launched our first outdoor brand campaign in New York's financial district, further solidifying our presence at the heart of global finance.

Article content
Navigating the Evolving Landscape

1. Convergence of Cloud, AI, and Infrastructure

Generational Cloud Reshuffle: Quarterly cloud infrastructure spending has surged to approximately $100 billion—double the amount since 2022. Google Cloud is leading with ~32% YoY growth, outpacing AWS, which is experiencing a modest decline in market share.
Rise of Alternative GPU Providers: Providers like CoreWeave, with expansive GPU farms throughout the U.S. and Europe, are emerging as key players, ushering in more flexible, specialized AI compute clouds.
Hybrid Cloud Strategies: Enterprises are increasingly blending public cloud, on-premises, and edge environments to meet demand for latency-sensitive workloads, cost predictability, and regulatory compliance.

2. From Hype to Hands-On AI Adoption

The Year of the Agent: 2025 is shaping up to be the "Year of the Agent" as organizations move from concepts to real-world deployment of autonomous AI agents.
Standardizing Agent Interoperability: Protocols like Model Context Protocol (MCP) are quickly being adopted across platforms (OpenAI, Gemini, Semantic Kernel), supporting the development of reliable, modular agent ecosystems.
From Prototype to Execution: Industry research highlights a decisive shift toward scaling and embedding AI products into core business workflows. Execution is now the critical competitive differentiator.

3. Financial AI in Full Throttle

AI Reshaping Finance: Financial institutions are decisively transitioning from intuition-driven to algorithmic, data-centric operations. Predictive models, automated credit scoring, and real-time fraud detection are driving new levels of accuracy and speed.
Strategic Cloud Investment: AWS, among others, is making significant investments in AI infrastructure for the financial sector, empowering institutions such as JPMorgan and Bridgewater with scalable, secure compute solutions.

Looking Ahead: Q3 and Beyond

As we enter Q4, our priorities include:

Scaling pilot deployments with enterprise clients
Finalizing the launch of our redesigned agentic platform
Deepening partnerships with key infrastructure providers like Databricks
Expanding our commercial presence across North America and EMEA

Campaigns

Scalata.ai is teaming up with TJW Ventures LLC to launch a new podcast and lead-generation initiative. The partnership will include Generative AI-focused events and up to three podcast episodes per week to build brand authority, generate leads, and support sales efforts.

Upcoming Industry Events

Money 20/20
SFA Forum
ABS East in Miami

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

Book a demo with our team today to experience the future of credit analysis.

https://scalata.ai/contact-us/

Scalata.ai is committed to maintaining the highest standards of data security and regulatory compliance, including active pursuit of SOC2 certification and alignment with evolving AI regulations. Our platform is designed to meet the stringent requirements of financial institutions while pushing the boundaries of what's possible in credit analysis.

For more information about our products or to schedule a meeting, please contact our team at info@scalata.ai

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