

AEC_VC

THE STATE OF AEC-TECH IN Q2 2026



TRENDS IN AEC-TECH Q2 2026

\$42B TOTAL VC FUNDING

EXCLUDING OUTLIERS LIKE KATERRA, VIEW & HALIO; OTHERWISE \$48B

\$690 M RAISED IN Q2

STRONG 2ND QUARTER, IN LINE WITH 2024 FIGURES

SEED STAGES AT HISTORIC HIGHS

HISTORIC PEAKS REACHED ALSO BY SERIES A & B, WHILE SERIES C LEVEL BACK DOWN TO 2020

0.3% VC MARKET SHARE

STABLE FROM Q4 2025 - LOWEST QUARTER SHARE SINCE 2024

EU + ISRAEL LEADS GLOBALLY

WITH 0.33% VC SHARE, VS. 0.26% IN NA - ALTHOUGH 8 OF THE TOP 10 ROUNDS TOOK PLACE IN NORTH AMERICA

CONCENTRATION AT THE TOP

TOP 4 DEALS = 34% | TOP 10 DEALS = 55% OF ALL Q2 FUNDING

PRIMER: WHAT IS THE SCOPE OF AEC-TECH?

PRIMER: WHAT IS AEC-TECH?



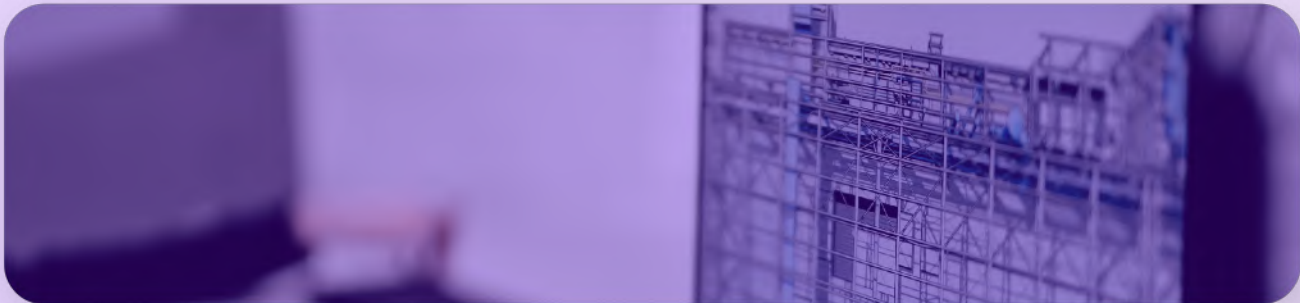
CORE CONSTRUCTION

EG. ON-SITE SOFTWARE, OFF-SITE MODULAR, BLUE-COLLAR, ROBOTICS, BUILDING MATERIALS



RENOVATION

EG. RETROFIT INSULATION, RENOVATION MARKETPLACES



PLANNING & DESIGN

EG. BIM, CAD, ARCHI/ENGINEERING SERVICES, INTERIOR DESIGN



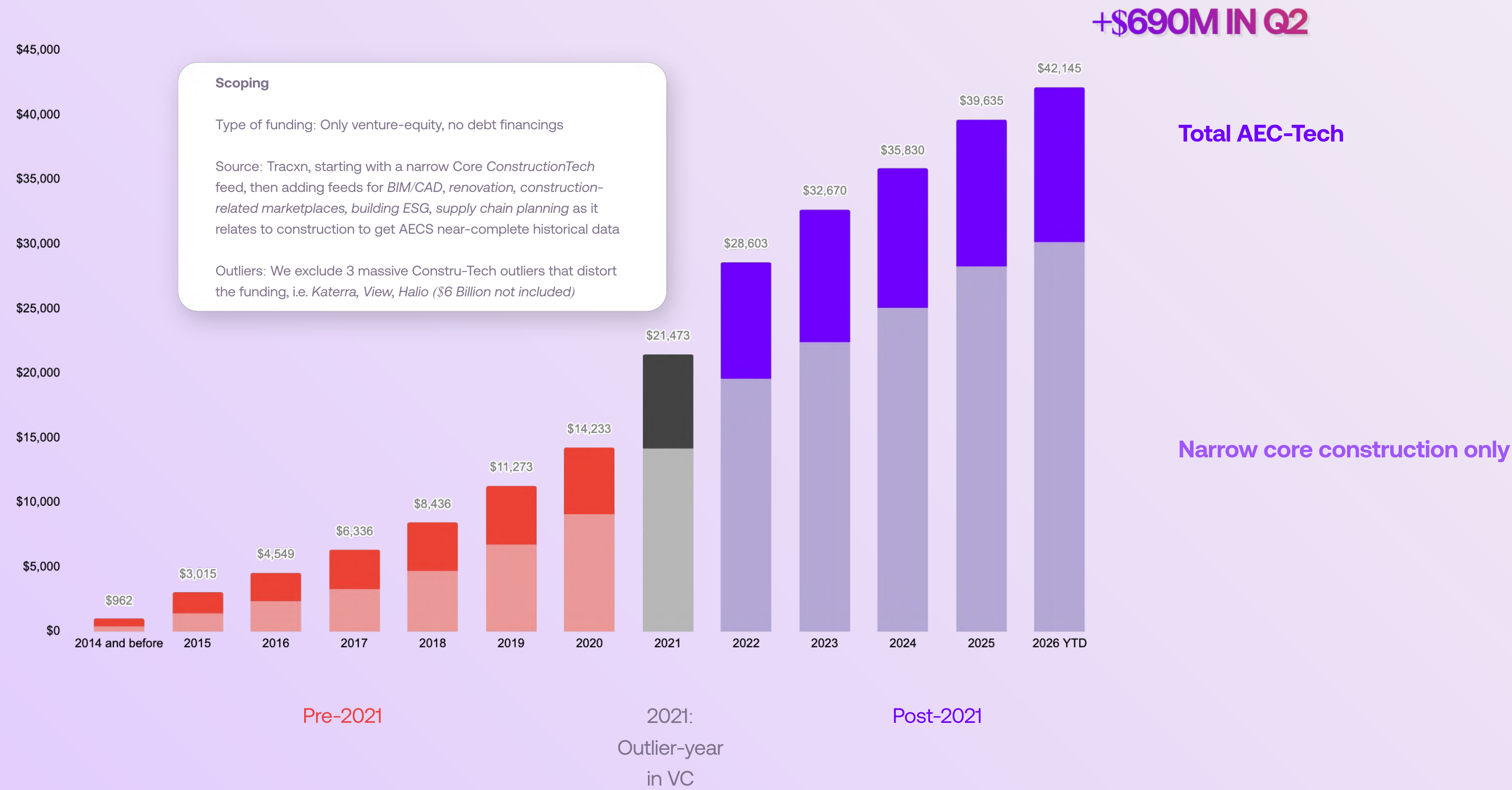
SUPPLY CHAINS

EG. B2B MARKETPLACES FOR CONSTRUCTION, PAYMENTS SOLUTIONS FOR CONSTRUCTION

AEC-TECH AT \$42 BILLION VC FUNDING

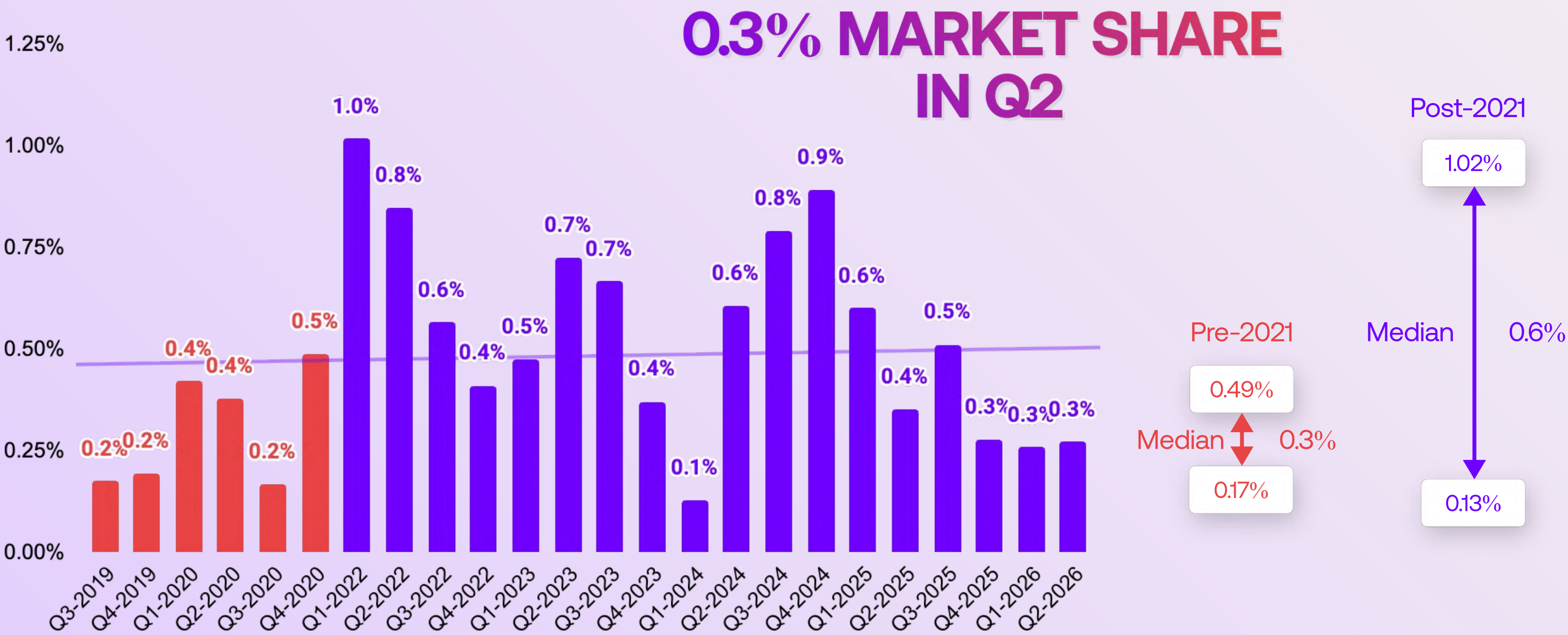
AEC-TECH: VENTURE CAPITAL (VC) FUNDING RAISED

\$M, CUMULATED



**MARKET SHARE: AEC-TECH
AT 0.3%-0.5% OF VC
FUNDING**

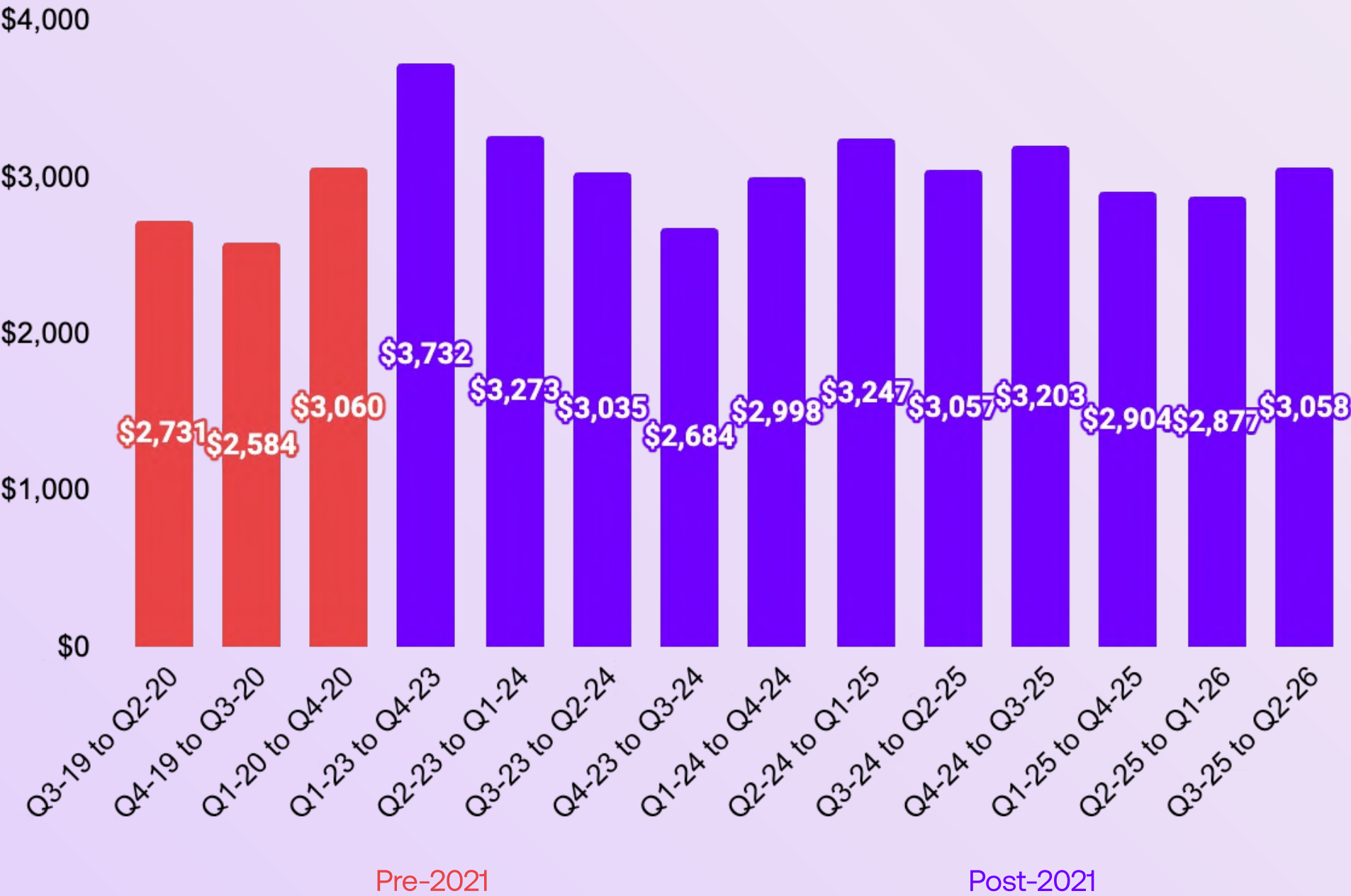
OVERALL TECH/AI WITH TWO STRONG FUNDING QUARTERS



**LAST 4 QUARTERS CONSTANT
AT 2024 LEVELS**

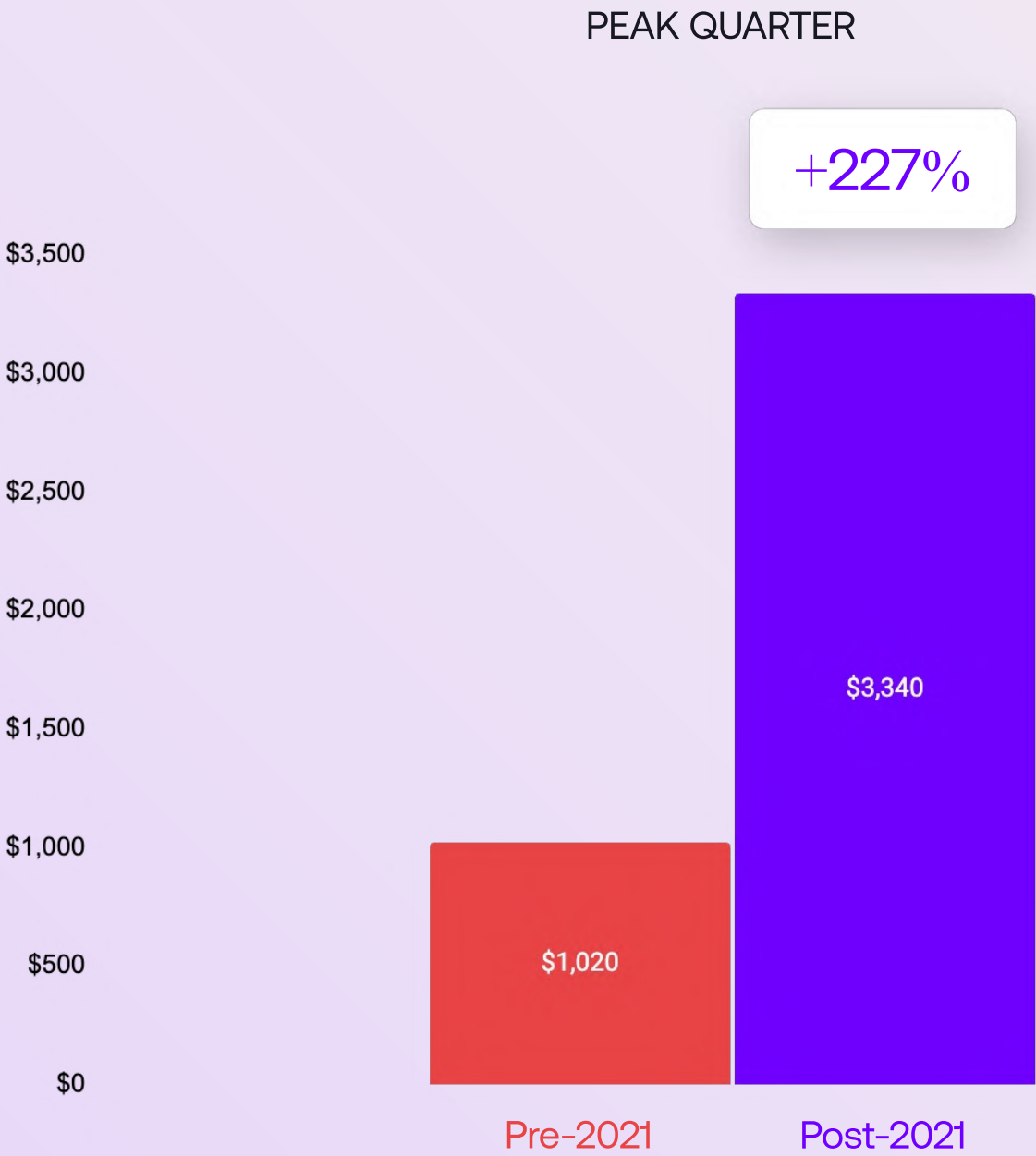
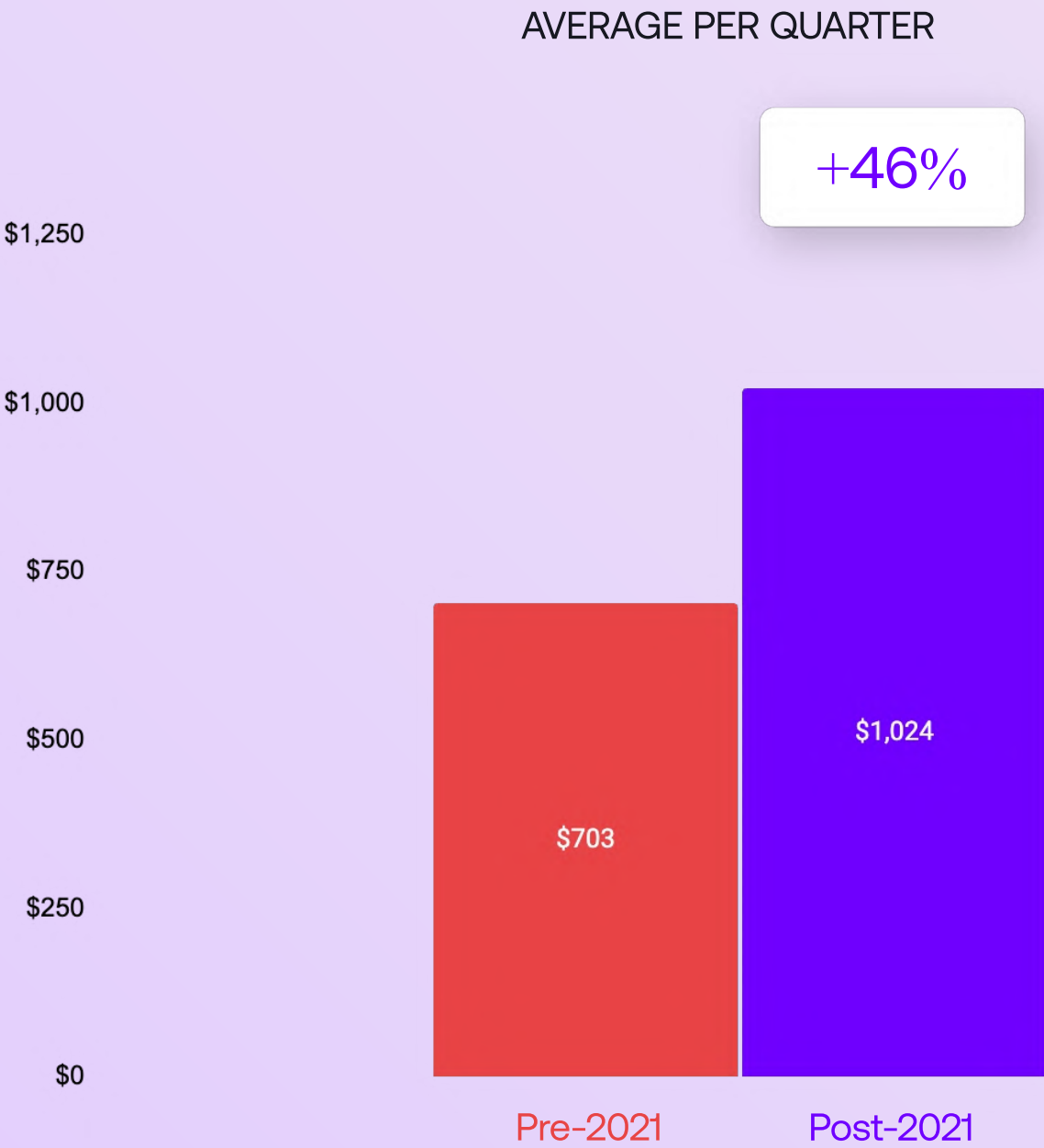
AEC-TECH: LAST 4 QUARTERS ROLLING: VC FUNDING

\$M



AEC-TECH: QUARTERLY REMAINS ABOVE PRE-2021 LEVEL

\$M

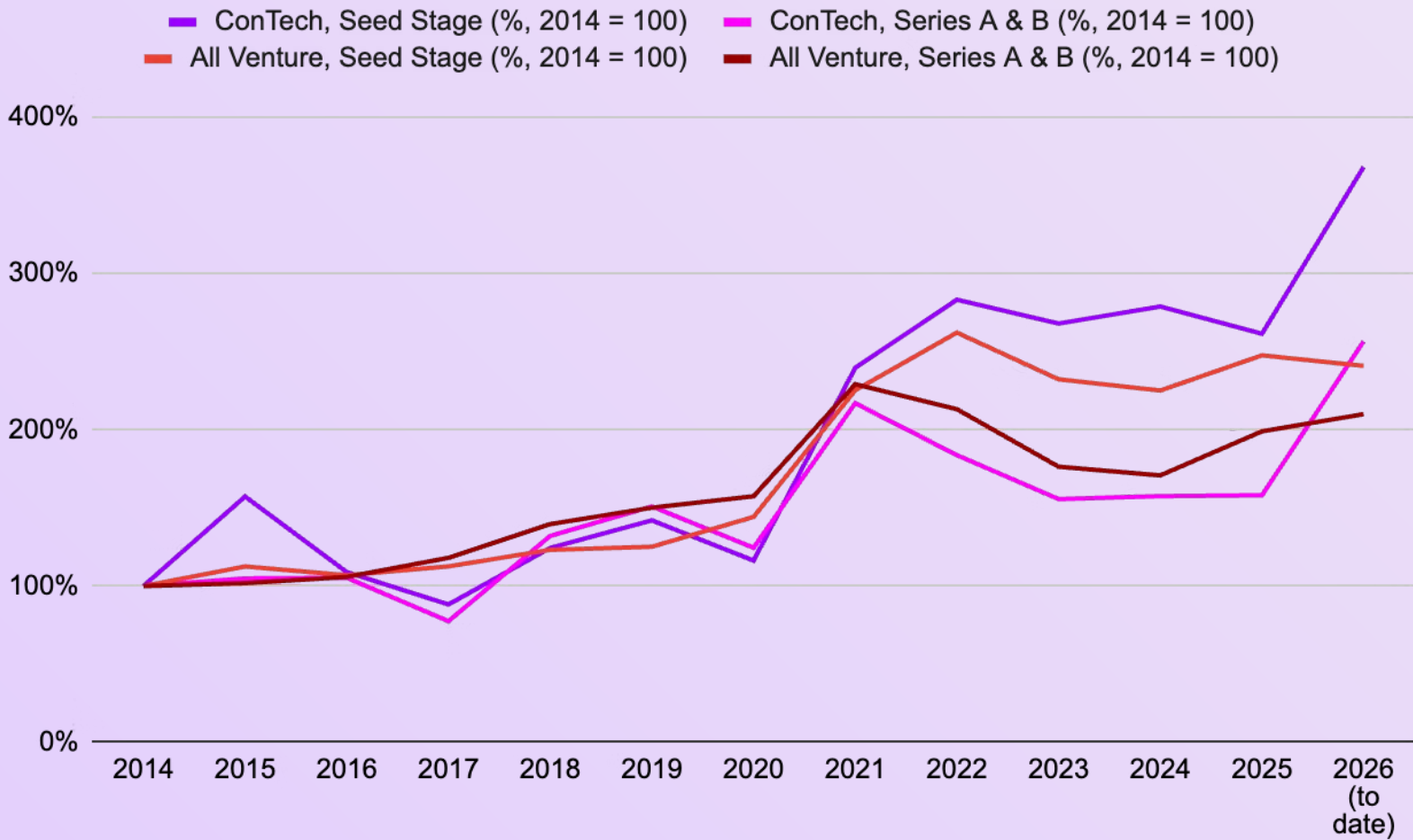


SEED AND SERIES A & B STAGES AT HISTORIC PEAKS

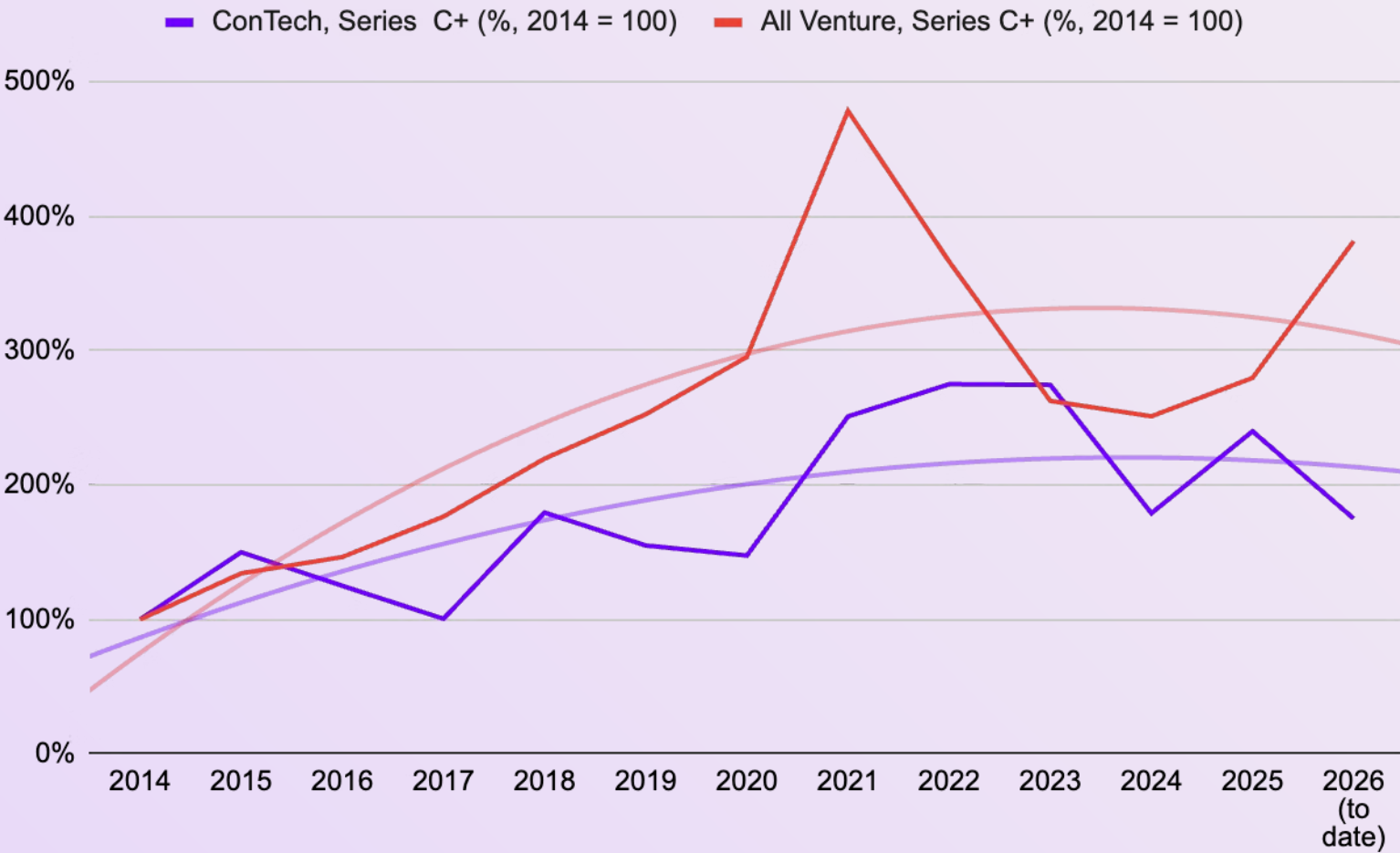
AEC-TECH: MEDIAN Q2 SEED AND SERIES A AND B ARE THE HIGHEST SINCE 2014

2014 = 100%

EARLY-STAGE



GROWTH-STAGE



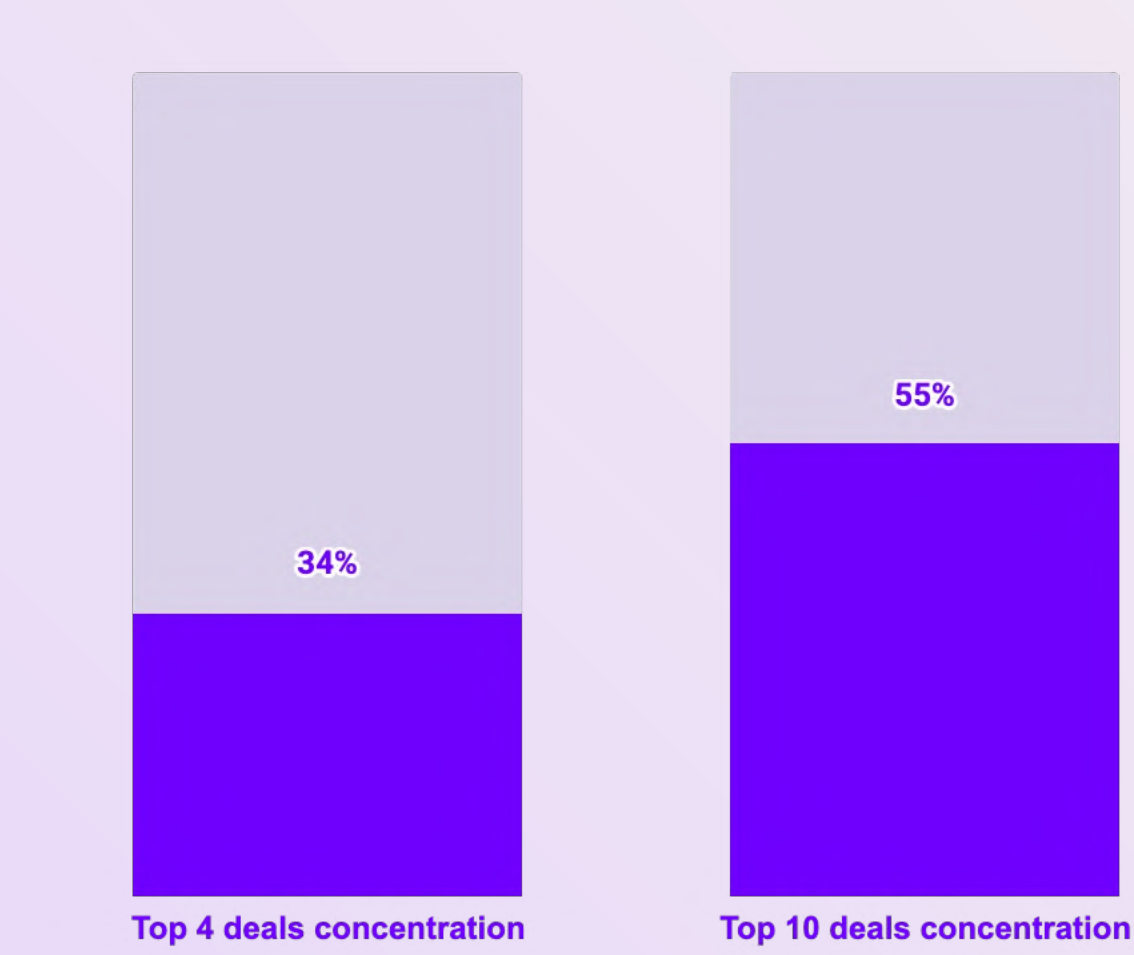
**CONCENTRATION
STABILIZED IN Q2**

AEC-TECH: BIGGEST FUNDING ROUNDS IN Q2 2026

10 LARGEST VC DEALS IN AEC-TECH IN LAST QUARTER

Higharc	\$95,000,000.00	3D staging platform	100%
Cognichip	\$60,000,000.00	Semiconductor design	
Endra	\$50,000,000.00	MEP design	75%
Disa Tech	\$33,000,000.00	Mineral recovery	
Handle	\$27,000,000.00	Construction payment	50%
All Three	\$25,000,000.00	Construction robotics	
Collow	\$23,000,000.00	Interior design	25%
LightTable	\$22,000,000.00	Construction documents review	
Terra CO2 Technologies	\$22,000,000.00	Cement manufacturer	0%
Outrider	\$21,500,000.00	Autonomous yard ops	

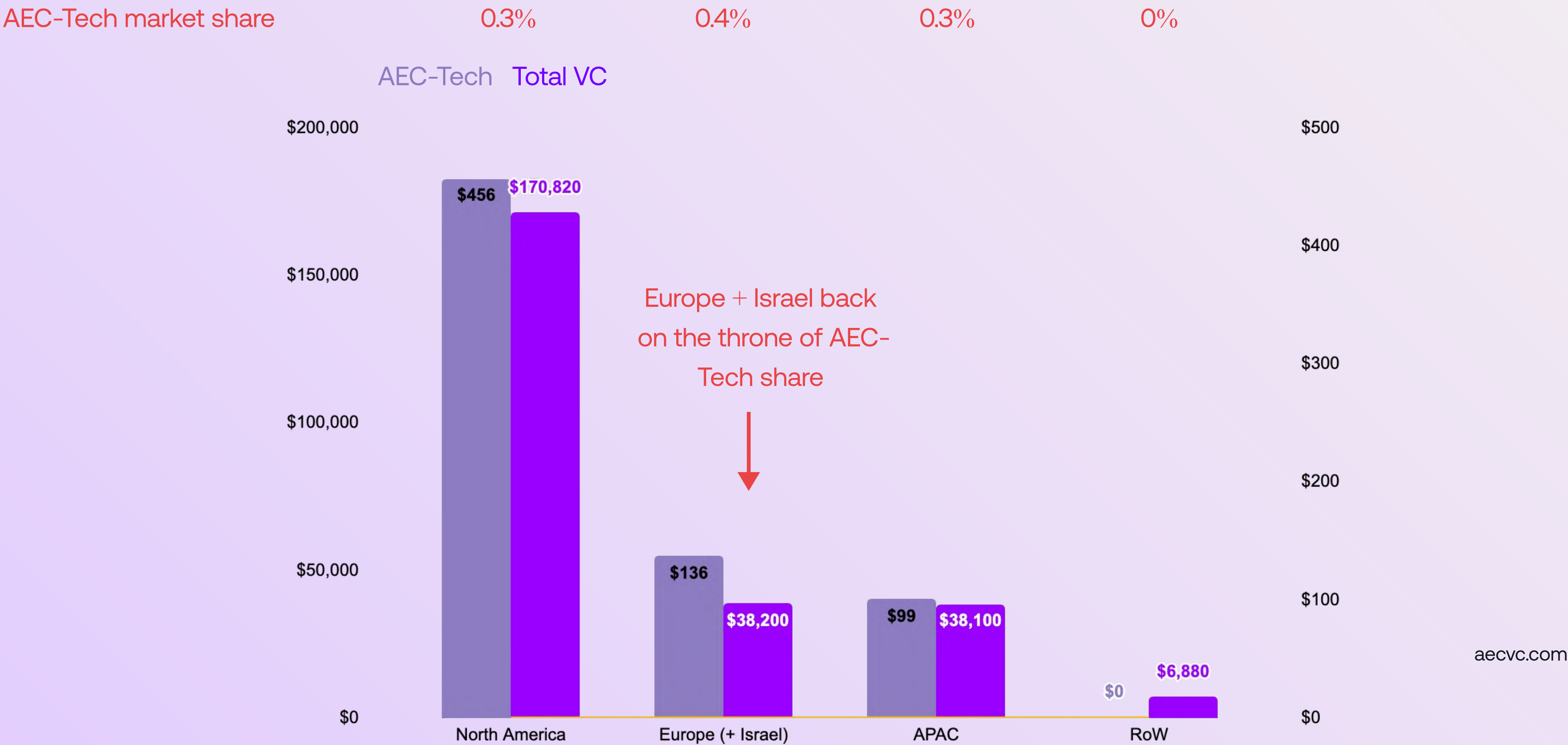
CONCENTRATION RATIO: SHARE OF TOP 4/10 DEALS OF TOTAL AEC-TECH FUNDING IN LAST QUARTER



BREAKDOWN BY REGION

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AEC-TECH: MARKET SHARE ACROSS REGIONS



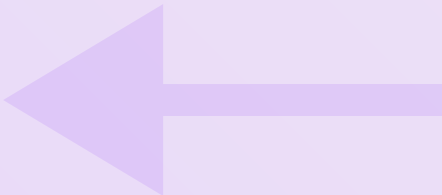
**NO NET NEW UNICORNS
IN Q2 2026**

LIST OF UNICORNS PER Q2-2026 IN CONSTRU-TECH ONLY

AS PUBLICLY KNOWN; SOME MIGHT HAVE BEEN REVALUED / DOWNGRADED

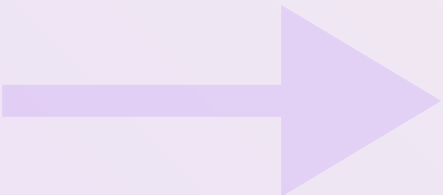
FORMER UNICORNS: NOW PUBLIC OR ACQUIRED

-  Aconex
-  Procore
-  RIB
-  View
-  EquipmentShare



CURRENT UNICORNS: ALIVE AND PRIVATE

-  Bedrock Robotics
-  BuildOps
-  Built Technologies (getbuilt.com)
-  Houzz ±
-  Icon
-  **Infra.Market (Fundamental portfolio)**
-  Kujiale ±
-  LivSpace
-  ManoMano
-  Material Bank
-  Moglix
-  OfBusiness
-  SafetyCulture
-  The Boring Company
-  Tubato (To8to) ±
-  **Zetwerk (seed-round led by Fundamental team)**



FORMER UNICORNS: INACTIVE

-  Katerra
-  Nexii
-  Veev

± i.e. last round 5 or more years ago

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