

Category Leadership Analysis

A full leaderboard for every category — public, private & out-of-export — with a 1–5 leadership score for each name.

METHOD & READING THE SCORES

Categories are sanity-checked, not taken from Crunchbase tags. CB lumps non-competitors together (it files Waymo and Shield AI both under "Autonomous Vehicles" — a robotaxi operator and a maker of autonomous *military* aircraft). Every category here was re-cut and verified against external research.

The whole market is scored. Each category lists its real leaders — public incumbents, private names absent from the export, and subsidiaries — each scored 1–5, with the pool names placed inside that ranking. That shows where a pool company *truly* ranks: GPU-cloud and cybersecurity pool names cap at ~3 because the definers are public, while Stripe, Databricks, Anduril, Figure and SpaceX are genuine 5s. **RTM holdings are scored normally.**

1–5 read: **5** category-defining name **4** strong top-tier / clear sub-leader **3** credible top-3/4 **2** trailing follower **1** one of many.

Status tags: **PUB** public **POOL** private, in the export **EXT** private, not in the export **SUB** unit of a public parent **RTM** current RTM holding.

Status: provisional *triage* reads built from secondary sources (analyst lists, trade press, company disclosures), June 2026. Public/ext scores are directional landscape placements that position the pool, not the deeper read the pool candidates get. Hierarchies are directional, not audited; figures vary by source. Eligibility has shifted under several leaders (Groq, Cerebras, CoreWeave, Nebius, Wiz, Rocket Lab, Oklo, Quantinuum) — verify private status before treating a pool name as the accessible leader.

THESIS CATEGORIES — FULL SCORED LEADERBOARDS

AI — foundation / frontier models

AI · conv 5

Frontier triumvirate hold the large majority of category value; second tier = well-capitalized fast-followers.

5	OpenAI POOL	#1 by funding, usage, brand
5	Anthropic POOL	co-leader; enterprise & coding strength
5	Google DeepMind PUB	frontier co-leader (Gemini)
4	xAI EXT	well-capitalized fast follower (Grok)
4	Meta AI / Llama PUB	open-weight scale leader
3	Mistral POOL	European #1, global top-5
3	DeepSeek EXT	China #1, efficient models
3	ByteDance / Doubao POOL	scale, not a pure-model lead
2	Moonshot / StepFun POOL	China frontier challengers
2	Cohere POOL	enterprise niche
2	Thinking Machines / Luma AI POOL	early-stage

Source: TLDL AI Landscape 2026; AIMultiple LLM share

AI — coding agents

AI · conv 5

Sub-category where pool names lead — far higher than lumped under 'AI'.

5	Anysphere / Cursor POOL	revenue & DAU leader (~\$2B ARR, 1M+ DAU)
4	GitHub Copilot PUB	Microsoft distribution moat
4	Claude Code POOL	Anthropic; fast-rising
4	Cognition / Devin+Windsurf POOL	autonomous-agent leader
3	OpenAI Codex POOL	OpenAI; bundled in ChatGPT
3	Replit EXT	agentic app-builder

Source: Vellum; JetBrains AI Pulse; TechCrunch

AI — GPU cloud / neocloud

AI compute 5 · power 5

No clear private #1 — a capacity land-grab; the definers are public.

5	CoreWeave PUB	scale leader (only Platinum tier)
4	Nebius PUB	Gold-tier public
3	Crusoe POOL	Gold-tier neocloud
3	Lambda POOL	developer-friendly Gold-tier
3	Nscale POOL	Europe sovereign AI, NVIDIA-backed
3	Fluidstack EXT	Gold-tier private
2	Firmus / DayOne POOL	scaling sub-leaders

Source: SemiAnalysis ClusterMAX 2.0; ABI Research

AI — chips / accelerators

AI compute 5

One of the most dominated categories in tech — weak leadership signal for challengers.

5	NVIDIA PUB	~80–90% share
4	Google TPU / AWS Trainium PUB	hyperscaler custom silicon
4	AMD PUB	#2 merchant GPU
3	Cerebras PUB	IPO'd challenger
3	Groq POOL	NVIDIA deal (elig.?)
2	SambaNova POOL	niche inference
2	Etched / Tenstorrent EXT	early challengers

Source: Fortune; Polaris Market Research

Robotaxi / AV-driving

Mobility 2 · AI 5

Score within sub-niche, not against Waymo. Operators vs. AV software/tooling.

5	Waymo SUB	clear global leader (Alphabet)
4	Baidu Apollo Go PUB	China leader
4	Tesla robotaxi / FSD PUB	long-term scale threat
3	Zoox SUB	Amazon-owned
3	Pony.ai / WeRide PUB	China robotaxi
4	Applied Intuition POOL	AV simulation/tooling leader (own niche)
3	Wayve POOL	end-to-end AV foundation models
2	Nuro POOL	pivoted to licensing
2	Momenta / Waabi POOL	sub-niche players

Source: Road to Autonomy; Motley Fool

Defense tech

Geopolitics/defense · conv 5

Anduril leads the new-prime / software-defined segment; legacy primes still dominate major platforms.

5	Lockheed / RTX / Northrop PUB	legacy prime incumbents
5	Anduril POOL	new-prime leader (~\$30–61B)
5	Palantir PUB	defense software
4	Helsing POOL	#1 Europe battlefield-AI
4	Saronic POOL	autonomous-maritime leader
4	Shield AI POOL	autonomous-air / 'AI pilot' leader
3	True Anomaly / Chaos POOL	space-defense challengers

Source: Augment; Defense News; New Market Pitch

Robotics — humanoid & surgical

Robotics · conv 4

Figure leads the private humanoid field; surgical is a separate, public-led sub-category.

5	Figure RTM	top private pure-play (~\$39B)
5	Tesla Optimus PUB	frontier peer w/ Tesla resources
4	Boston Dynamics SUB	Hyundai-owned
4	Agility Robotics EXT	closest to commercial (Amazon/GXO)
4	Apptrotronik EXT	Mercedes pilot
3	1X EXT	OpenAI-backed
3	Unitree / AgiBot EXT	China
3	NEURA / Skild AI POOL	robot foundation models
5	Intuitive Surgical PUB	surgical-robotics definer
3	CMR Surgical POOL	surgical challenger

Source: Standard Bots; New Market Pitch

Cybersecurity

Cyber · conv 5

No private category-definer left in the pool — incumbents are public.

5	Palo Alto Networks PUB	#1
5	CrowdStrike PUB	endpoint/XDR leader
5	Microsoft Security PUB	bundled scale
4	Zscaler / Fortinet PUB	network-security leaders
4	Wiz SUB	Google-acquired cloud-security leader
3	Cyera POOL	data-security-posture niche leader
3	Cato Networks POOL	SASE
3	NinjaOne POOL	endpoint/IT mgmt

Source: CanIPhish; VaaSBlock

Payments & fintech

Finance · conv 3

Stripe the definitional private leader; adjacent fintech leaders score on their own niche.

5	Stripe POOL	definitional private payments leader
5	Adyen PUB	public payments leader
4	PayPal / Block PUB	incumbent scale
4	Plaid POOL	data/connectivity #1
4	Ramp POOL	spend-mgmt leader, ahead of Brex
3	Checkout.com / Airwallex POOL	cross-border challengers
3	Brex EXT	spend-mgmt #2
3	Trade Republic / Wealthsimple POOL	trading/wealth leaders (regional)
2	Rapyd POOL	challenger

Source: Airwallex analyses; TechCrunch

Neobanks

Finance · conv 3

Nubank & Revolut lead at global scale; the rest are regional challengers.

5	Nubank PUB	~119M users, LatAm
5	Revolut POOL	most valuable ~\$75B, global private leader
4	Chime PUB	US leader
3	Monzo / N26 EXT	Europe challengers
3	Toss POOL	Korea leader
2	Ualá / Varo POOL	regional challengers

Source: FintechNews; OpenPR neobank data

Prediction markets

Finance · conv 3 (young)

Two-horse race and RTM's 'front-end' zone — high leadership in an early category.

5	Kalshi POOL	co-definer; recently ~62% US share
5	Polymarket POOL	co-definer (crypto-native)

Source: Pew Research; Bitcoin.com

Crypto exchange

Finance · conv 3

Global #1 private (Binance) and US #1 public (Coinbase) dominate.

5	Binance EXT	global #1
5	Coinbase PUB	US #1
3	OKX / Bybit EXT	global top-5
3	Kraken POOL	solid US top-3, not the leader

Source: industry data

Energy — fusion

Energy · conv 5

Frontier R&D — leadership real but pre-commercial.

5	Commonwealth Fusion EXT	~1/3 of all private fusion funding
4	Helion POOL	Microsoft power deal; CFS leads category
3	TAE EXT	going public via merger
2	Tokamak / General Fusion EXT	challengers

Source: Nature Tech Memos; Fortune

Energy — advanced nuclear / SMR

Energy · conv 5

TerraPower leads the private SMR field by funding + construction progress.

5	Oklo PUB	Altman-backed momentum leader
4	TerraPower POOL	Gates; building first plant
3	X-energy EXT	private SMR
3	NuScale PUB	first NRC-approved SMR

Source: Fortune; SEC filings

Energy — batteries & materials

Energy 5 · materials 2

Score by sub-segment: cells (public-dominated), recycling/materials, minerals, storage.

5	CATL PUB	global #1 cells
4	LG / Samsung SDI / Panasonic PUB	cell incumbents
4	Redwood Materials POOL	US recycling/materials leader (Straubel)
4	KoBold Metals POOL	AI critical-minerals exploration leader
4	Form Energy POOL	iron-air long-duration leader
3	Ascend Elements / Group14 POOL	recycling / silicon-anode
3	Base Power POOL	residential/VPP, emerging
2	SK on POOL	major cell maker but trailing
2	Zenobe POOL	fleet/grid storage

Source: industry & company data

Energy — developers & energy-tech

Energy · conv 5

Fragmented regional IPPs, no private definer; Octopus's software layer is the exception.

5	NextEra / Brookfield Renewable PUB	scale-leader utilities/IPP
4	Octopus Energy POOL	retail-energy + Kraken software licensing
3	Generate Capital POOL	sustainable-infra developer/financier
2	Avaada / SB Energy / Nexamp / Silicon Ranch / SAEL / rPlus / Peregrine POOL	regional developers
2	MidOcean Energy POOL	LNG (EIG-backed)

Source: industry data

Space — launch, in-space & EO

Space 2 · defense 5

SpaceX the clearest #1 in the pool; pool sub-leaders own their niches.

5	SpaceX RTM	~60–80% of global mass-to-orbit
4	Blue Origin EXT	#2 private
4	Rocket Lab PUB	small-launch leader
4	ICEYE POOL	commercial SAR-satellite leader
3	Impulse Space POOL	in-space mobility niche leader
3	Axiom Space POOL	commercial-station leader
3	Sierra Space POOL	stations/defense
3	Astranis POOL	GEO smallsat-comms niche
2	iSpace China / Stoke Space POOL	reusable-launch challengers

Source: Payload; Motley Fool

Quantum computing

Quantum · conv 3

Several strong players across public + private — leadership diffuse.

5	IBM / Google Quantum PUB	big-tech leaders
4	IonQ PUB	revenue leader
4	Quantinuum EXT	most logical qubits; filing to list
3	PsiQuantum POOL	top-tier photonic approach
2	Rigetti / D-Wave PUB	smaller public players

Source: QuantumZeitgeist; Lambda Finance

AI — data infrastructure / dev tools

AI compute 5

A leader-rich category the first pass under-covered.

5	Databricks POOL	private data+AI platform leader; 5× Gartner MQ leader
5	Snowflake PUB	public data-cloud leader
4	ClickHouse POOL	real-time OLAP (~\$15B)
4	Supabase POOL	developer-backend leader
4	Grafana Labs POOL	observability leader
3	VAST Data POOL	AI data platform

Source: Gartner MQ; ClickHouse; DevNewsletter

AI — vertical / applied enterprise AI

AI · conv 5

Fragmented by vertical — score within each, never across. Public comparators are the incumbent suites.

4	Harvey POOL	legal-AI leader
4	Sierra POOL	agentic-CX leader (Bret Taylor)
4	AlphaSense POOL	market-intelligence leader
4	Dataminr POOL	real-time-intel leader
3	Perplexity POOL	AI-search challenger to Google/OpenAI
3	Metropolis POOL	vision/mobility payments
3	MEGVII POOL	computer vision, China

Source: GeekWire; SymphonyAI; Houlihan Lokey

Semiconductors — foundry / manufacturing

AI compute 5

Sovereign/strategic-driven challengers; incumbents dominate.

5	TSMC PUB	global foundry #1
4	Samsung / Intel Foundry PUB	foundry #2/#3
3	Rapidus POOL	Japan 2nm national champion
2	SJ Semi POOL	China packaging/test

Source: industry data

Autonomous logistics / drones

Mobility/AI

Pool leader of a real niche.

4	Zipline	POOL	autonomous drone-delivery leader by volume
4	Wing	SUB	Alphabet drone delivery
2	Matternet / Manna	EXT	challengers

Source: company data

Public safety / physical-security AI

Defense-adjacent

Pool name leads its independent niche; the definer is public.

5	Axon	PUB	public-safety definer (Taser/body-cams)
4	Flock Safety	POOL	license-plate / community-camera network leader
3	Verkada	EXT	cloud physical security

Source: company data

Healthcare / biotech platforms

Healthcare · conv 4

Capital-intensive; no clear category lock. Incumbent comparators are public.

3	Verily	POOL	Alphabet precision-health / data platform
3	Resilience	POOL	biomanufacturing CDMO, well-funded

Source: company data

Consumer health, wearables & neurotech

Healthcare 4 / neuro 1

Pool names lead independent niches under public category definers.

5	Apple Watch	PUB	wearables definer
4	Oura	POOL	smart-ring category leader
3	Whoop	EXT	fitness-band challenger
4	Neuralink	POOL	BCI leader by profile/funding
3	Synchron	EXT	endovascular BCI
2	BrainCo	POOL	consumer neurotech, early

Source: company data

Digital infrastructure / connectivity

AI power 5 (DCs) / lower

Data centers ride the AI-power buildout; broadband is utility-like.

5	Equinix / Digital Realty	PUB	global colocation leaders
3	Princeton Digital Group	POOL	APAC data centers
3	Flexential	POOL	US colocation
3	EnergyRe / Peregrine Energy	POOL	power/transmission for data centers
2	BrightSpeed / NBN Co	POOL	broadband/fiber, utility-like

Source: company data

Immersive / AR-VR

Immersive reality · conv 1

Weak standalone trend; a follower category.

5	Meta Reality Labs / Apple Vision	PUB	platform leaders
2	Magic Leap	POOL	enterprise AR, restructured

Source: company data

OFF-THESIS CATEGORIES — SCORED THE SAME WAY

Scored on leadership against public + private peers exactly like the others. Each carries a **low secular-trend** score (shown) which separately drags the composite down — a real leader here (Faire, Rippling, Telegram) still earns its leadership points; the trend factor is what penalizes them.

Q-commerce / instant delivery

secular ~1

Public leaders dominate at scale; pool names lead regional pockets.

5	DoorDash / Instacart / Meituan / Delivery Hero	scale leaders
	PUB	
4	Blinkit/Eternal	India #1 (~48%)
	PUB	
4	Swiggy	India #2
	PUB	
3	Zepto	India #3 (~22%)
	POOL	
3	Rappi	LatAm delivery super-app leader
	POOL	
2	Flink	European survivor
	POOL	
2	Gopuff	US pure-play, pressured (\$40B → ~\$5B)
	POOL	

Source: Fortune Business Insights; Demandsage

E-commerce / marketplaces / DTC

secular ~1

Public giants at the top; pool names lead specific marketplaces.

5	Amazon / Shopify / MercadoLibre	scale leaders
	PUB	
4	Faire	#1 B2B wholesale marketplace (Shopify-backed)
	POOL	
4	Kavak	largest LatAm used-car marketplace
	POOL	
3	Noon	MENA #2 behind Amazon (PIF-backed)
	POOL	
3	Quince	breakout DTC value brand (~\$10B); DTC fragmented
	POOL	

Source: DigitalCommerce360; Sacra

HR / workforce SaaS

future of work ~4 (mature)

Workday the enterprise gold standard; new-gen co-leaders Rippling & Deel.

5	Workday	enterprise gold standard
	PUB	
4	Rippling	unified HR/IT/payroll
	POOL	
4	Deel	global-payroll co-leader
	EXT	
3	Gusto	SMB payroll
	EXT	

Source: Asanify; Paylocity comparisons

Insurance / brokerage / insurtech

finance ~3

Public brokers dominate; Howden the largest independent.

5	Marsh / Aon / Gallagher / WTW	top-tier brokers
	PUB	
3	Howden	#10 global broker, largest independent
	POOL	
2	McLarens	mid-tier claims/loss-adjusting
	POOL	
2	wefox	regional insurtech, restructured
	POOL	

Source: Business Insurance; The Insurer

Messaging / social

consumer internet ~1

Big-platform messengers lead globally; Telegram the leading independent.

5	WhatsApp	SUB	Meta, 3.3B users
5	WeChat	PUB	Tencent, China
4	Telegram	POOL	leading independent messenger, 1B+ MAU

Source: messaging-app comparisons 2026

Agtech / climate-ag

sustainability ~2

Incumbent-heavy, fragmented field.

5	Bayer / Corteva	PUB	incumbents
3	Pivot Bio / FBN	EXT	biologicals / fintech-ag peers
3	Indigo Ag	POOL	category pioneer by funding; restructured

Source: Global AgInvesting; Agriculture Dive

Crypto / web3

finance ~3

Public leaders + the prediction-markets co-leader.

5	Coinbase / Circle	PUB	exchange / stablecoin leaders
5	Polymarket	POOL	prediction-markets co-leader
2	World Liberty Financial	POOL	notable DeFi/stablecoin entrant, not a leader

Source: DL News; industry data

TAKEAWAYS

- 1. Correcting the tags changes scores.** Names that looked like also-rans in a giant blob lead a correctly-drawn sub-category — Anysphere (coding agents), Applied Intuition (AV tooling), Saronic (autonomous maritime), Plaid (data connectivity), Kalshi (prediction markets). Always score at the sub-category level.
- 2. Reading the full leaderboard shows where the pool truly ranks.** Where the definer is a *public* incumbent (NVIDIA, Palo Alto, CATL, Nubank) the pool's apparent "#1" caps at ~3. RTM holdings are scored normally — Figure (humanoid) and SpaceX (space) earn their 5 because they genuinely lead.
- 3. Cleanest categories for the factor:** defense (Anduril 5), payments (Stripe 5), data infra (Databricks 5), humanoid (Figure 5), space (SpaceX 5), prediction markets (Kalshi 5), coding agents (Anysphere 5). **Weakest:** solar developers, battery cells, AI chips, immersive — fragmented or incumbent-dominated.
- 4. Off-thesis ≠ unscored.** Faire, Kavak, Rippling and Telegram genuinely lead their spaces (4s); their low secular-trend score is what pulls the composite down — the two-factor design at work, no special handling.

*One pool name — **Accelerate** — is unclassified pending verification of the underlying business before it can be placed on a leaderboard.*

SOURCES — LINK & MAIN POINTS USED

Web research, June 2026. Hierarchies are directional reads from secondary sources; company funding/valuation figures cross-checked against the Crunchbase export. Forward-dated figures reflect what these outlets reported and are not independently audited.

TLDL — AI Companies Landscape 2026

<https://www.tldl.io/resources/ai-companies-landscape-2026>

OpenAI + Anthropic hold the large majority of foundation-model category value; OpenAI #1, Anthropic the clear #2; Mistral the leading European lab.

AIMultiple — LLM Market Share

<https://aimultiple.com/llm-market-share>

OpenAI leads the lab 'power index' (~51.8% of usage across own + third-party apps).

Vellum — Best AI Coding Agents 2026

<https://www.vellum.ai/blog/best-ai-coding-agents>

Cursor (Anysphere) the leading AI-native IDE; Claude Code, GitHub Copilot, Cognition/Devin the rest of the field.

Tech-Insider — Cursor vs Copilot 2026

<https://tech-insider.org/cursor-vs-copilot-2026/>

Anysphere ~\$2B ARR, ~1M DAU, 67% of Fortune 500; in talks at ~\$50B valuation.

SemiAnalysis — ClusterMAX 2.0 GPU-cloud rating

<https://newsletter.semianalysis.com/p/clustermax-20-the-industry-standard>

CoreWeave the only Platinum tier; Nebius/Crusoe/Fluidstack Gold; Nscale = EU sovereign AI.

Fortune — After NVIDIA's Groq deal

<https://fortune.com/2026/01/05/nvidia-groq-deal-ai-chip-startups-in-play/>

NVIDIA ~80-90% share; Groq tech acquired by NVIDIA; Cerebras & SambaNova the challengers.

ClickHouse — Top cloud data warehouses 2026

<https://clickhouse.com/resources/engineering/top-5-cloud-data-warehouses>

Snowflake & Databricks lead; ClickHouse the real-time-OLAP specialist.

DevNewsletter — State of Databases 2026

<https://devnewsletter.com/p/state-of-databases-2026/>

Databricks 5x Gartner MQ leader; ClickHouse \$400M Series D at ~\$15B; Supabase \$2B->\$5B in four months.

GeekWire — The rise of vertical AI agents

<https://www.geekwire.com/2026/the-rise-of-vertical-ai-agents-and-the-startups-racing-to-build-them/>

Vertical agents (Harvey=legal, Sierra=CX) eating SaaS; Sierra valued ~\$4.5B (Bret Taylor).

Road to Autonomy — Autonomy Leaderboard

<https://www.roadtoautonomy.com/autonomy-leaderboard/>

Waymo the commercial robotaxi leader (~400k paid rides/week); Tesla the long-term scale threat.

SOURCES — LINK & MAIN POINTS USED (CONTINUED)

Augment — Anduril at \$61B

<https://augment.market/pulse/anduril-at-61b-and-defense-techs-2026-reset>

Anduril ~\$61B post-Series H, ~\$2.2B 2025 revenue - the clear defense new-prime leader.

New Market Pitch — Defense tech by valuation 2026

<https://newmarketpitch.com/blogs/news/defense-tech-top-startups-valuation>

Helsing EUR12B (#1 Europe), Chaos \$4.5B, Saronic \$4B, Shield AI \$2.8B.

Standard Bots — Humanoid robotics companies 2026

<https://standardbots.com/blog/humanoid-robotics-companies>

Figure top private valuation ~\$39B; Agility closest to commercial; Aptronik, 1X close behind; Boston Dynamics (Hyundai).

CanIphish — Largest cybersecurity companies 2026

<https://caniphish.com/blog/largest-cybersecurity-companies>

Palo Alto #1; CrowdStrike ~\$5.25B ARR; Wiz (Google) ~\$15B - leaders are all public.

TechCrunch — Airwallex takes on Stripe

<https://techcrunch.com/2026/04/15/airwallex-is-about-to-take-on-stripe-and-the-rest-of-the-payments-industry-in-the-physical-world/>

Stripe the payments powerhouse; Airwallex ~\$1.3B annualized revenue, ~\$8B val, ~85% growth.

FintechNews — Revolut dethrones Nubank

<https://fintechnews.ch/virtual-banking/revolut-dethrones-nubank-as-worlds-most-valuable-neobank/78510/>

Revolut ~\$75B, most-valuable neobank; Nubank 119M users (public); Chime US (public).

Pew Research — Prediction-market volume soared

<https://www.pewresearch.org/short-reads/2026/05/27/trading-volume-on-prediction-markets-has-soared-in-recent-months/>

Kalshi & Polymarket the two leaders; monthly volume ~\$24B by April 2026.

Bitcoin.com — Kalshi takes the lead April 2026

<https://news.bitcoin.com/prediction-market-traders-push-april-2026-volume-to-8-6b-kalshi-takes-the-lead/>

Kalshi overtook Polymarket to ~62% US share, led by sports.

Nature Tech Memos — Top fusion startups 2026

<https://www.naturetechmemos.com/p/top-10-fusion-energy-startups-to-watch-in-2026>

Commonwealth Fusion ~1/3 of all private fusion funding; Helion (Microsoft 2028 deal), TAE, General Fusion.

Fortune — Next-gen nuclear tipping point

<https://fortune.com/2026/02/07/next-gen-nuclear-tipping-point-meta-hyperscalers-bill-gates-terrapower-sam-altman-oklo/>

TerraPower (Gates) building Kemmerer SMR; Oklo (Altman, public); Meta signing up to 6.6 GW.

SOURCES — LINK & MAIN POINTS USED (CONTINUED)

Payload — The State of Launch 2026

<https://payloadspace.com/the-state-of-launch-2026/>

SpaceX ~80% of global mass-to-orbit; Blue Origin #2; Rocket Lab Neutron targeting 2026; ICEYE leads commercial SAR.

QuantumZeitgeist — Top quantum hardware companies

<https://quantumzeitgeist.com/top-quantum-hardware-companies/>

IonQ revenue leader (public); Quantinuum most logical qubits (filing S-1); PsiQuantum photonic, \$1.3B+.

Demandsage — Quick-commerce statistics 2026

<https://www.demandsage.com/quick-commerce-statistics/>

India: Blinkit 48%, Swiggy 24%, Zepto 22%; US led by DoorDash/Instacart; Gopuff ~\$5.45B (from \$40B).

DigitalCommerce360 — Faire reaches \$5.2B

<https://www.digitalcommerce360.com/2025/12/05/b2b-marketplace-faire-reaches-5-2-billion-valuation/>

Faire the front-runner B2B wholesale marketplace - 100k+ brands, Shopify-backed, \$500M+ revenue.

Asanify — Deel vs Rippling 2026

<https://asanify.com/blog/competition/deel-vs-rippling-pricing-payroll-global-hiring-compared/>

Rippling = unified HR/IT/payroll; Deel = global hiring; Workday the enterprise gold standard.

Business Insurance — World's 10 largest brokers

<https://www.businessinsurance.com/2024-brokers-profiles-worlds-10-largest-insurance-brokers/>

Marsh \$25.3B, Aon \$15.4B, Gallagher \$11.1B ... Howden #10 at \$3.77B (largest independent).

Softmaker — Messenger comparison 2026

<https://www.softmaker.com/en/blog/friday-chat/blog-messenger-comparison-privacy-2026>

WhatsApp 3.3B MAU (Meta); Telegram 1B+ - the leading independent messenger.

Agriculture Dive — Indigo Ag restructuring

<https://www.agriculturedive.com/news/agtech-seedlings-indigo-ag-splits-businesses-sustainability-biologicals/715130/>

Indigo Ag (~\$1.4B raised) split carbon-credit & biologicals units; Pivot Bio, FBN the peers.