
DRAKO AI
Models that understand real places
Read video. Track events.
Learn what happens next.
INTELLIGENCE ACROSS SPACE AND TIME
Proposed Brivo spinout. Investor discussion. November 2026.
01

A clip is only part of the event

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A useful answer needs video, records and site context.

ILLUSTRATIVE ACCESS EXCEPTION

Was this entry authorized?

Model buyers
Software platforms that need an answer with evidence.

Video

Two people enter.

Access

One credential gets access.

Context

Check visitor records and site rules.

Data and rights in hand

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Continuing exclusive training license. Build the training-data system.

6 PB

Refreshed video, access and event data

Ready to mine

100%

Customer data opted in

Current training agreement

>$300M

Combined parent ARR

Existing business

Brivo and Cobalt offer a route to first model customers.

Supplied premises. Parent ARR is not Drako revenue. Spinout and sales terms remain open.

Two models. Two ways to sell.

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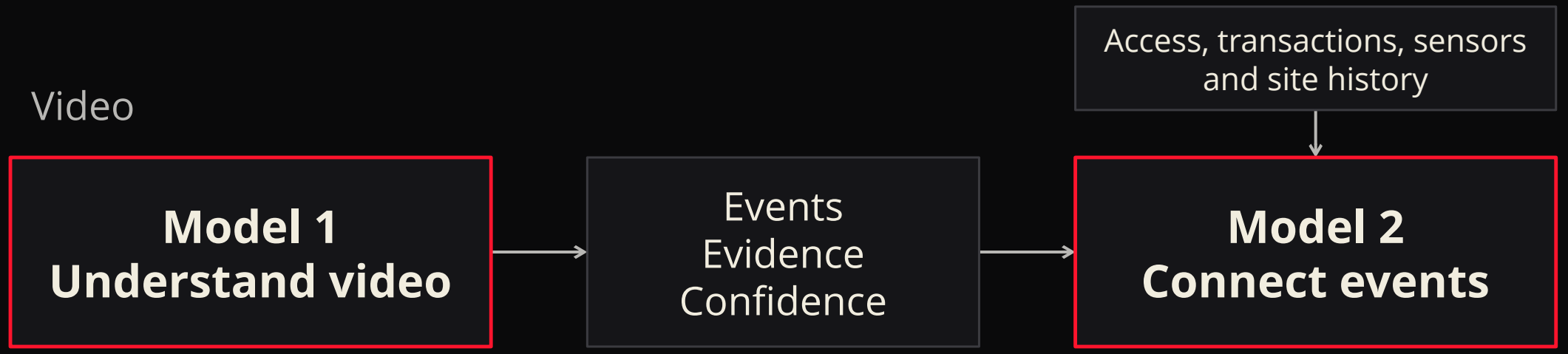
Understand video. Track a place over time.



Recognize actions.
Keep the evidence.

Track state.
Forecast what comes next.

Test and sell each model separately.

First, build the training-data system

Make the 6 PB feed useful for training.

01

Align

Link sites, cameras, doors and times.

02

Build episodes

Group video, access and events.

03

Review labels

AI suggests labels. People check.

04

Add outcomes

Log actions and outcomes.

Hold out customers and time periods for testing.

The source feed exists. Reviewed training sets must be built.

Start inside Brivo and Cobalt

Proposed first model buyers. Existing customer workflows.

License the models	**Better event analysis and state estimates** Embed model capability in their products.
Capture corrections	**People review evidence and record what happened** Keep the answer, correction and action.
Train on outcomes	**Verified results improve the next training set** Start with access and door exceptions.

No paid Drako model contract is assumed. Collection features still need to be built.

Sell models to software builders

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Three commercial routes.

EMBED

Model licenses

Brivo, Cobalt and other platforms
License model access

BUILD

Developer APIs

Video to events
Events to state
Charge for measured use

DEPLOY

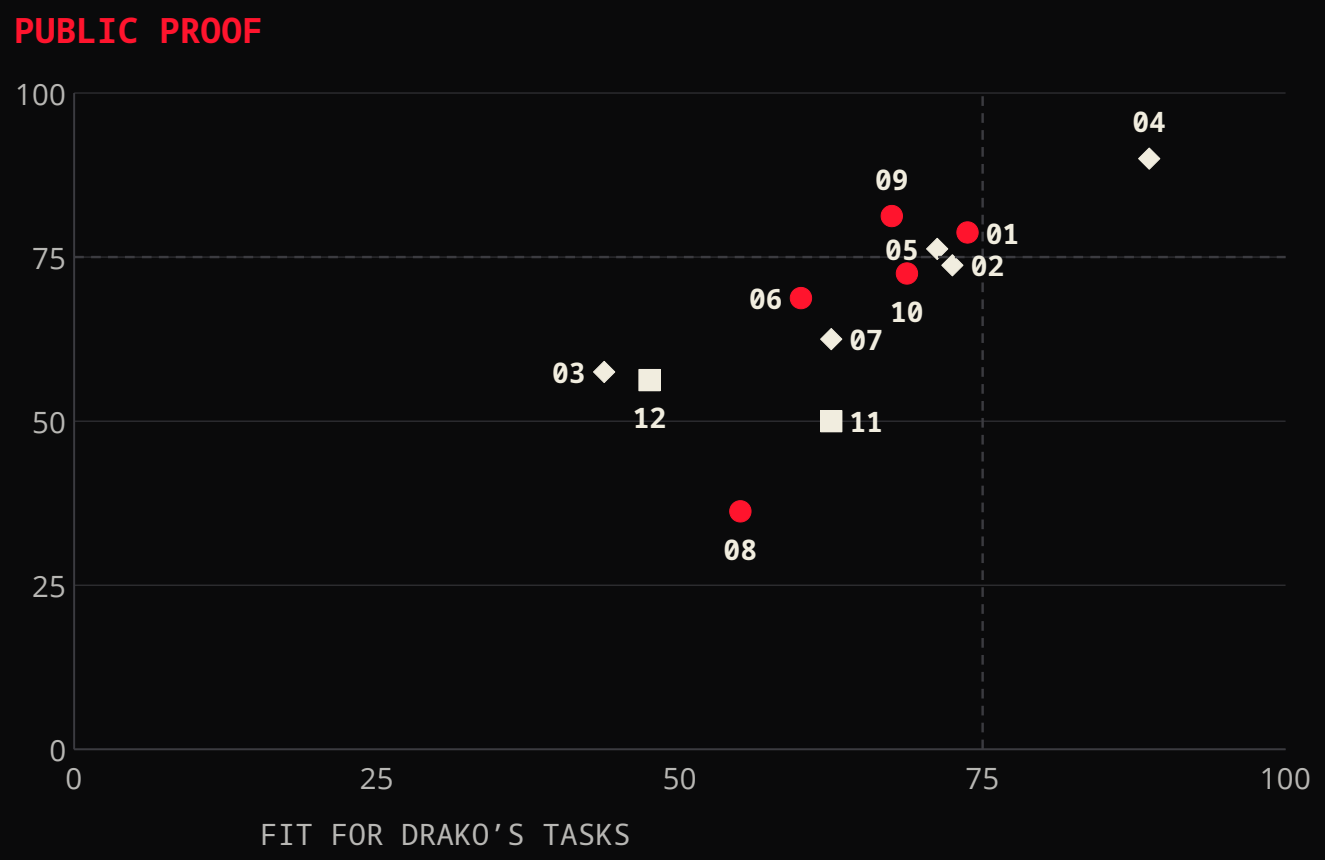
Private models

Dedicated infrastructure
Enterprise controls
Capacity and support

Proposed products and terms. No pricing or bookings are represented as established.

The model-company landscape

Task fit × public proof. Twelve model programs.



01 TwelveLabs
02 Google Gemini
03 Google Genie
04 NVIDIA Cosmos
05 Meta V-JEPA
06 General Intuition / MIRA
07 World Labs / Atlas
08 Runway GWM
09 Runway Praxis
10 Odyssey
11 Ambient Pulsar
12 Milestone Hafnia

Unranked: Drako and AMI

Diamond: corporate • Circle: independent
Square: domain model

Public-evidence scores, not accuracy or valuation. Independent assessment, not Gartner.

Understand a place over time

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Keep updating the answer as new evidence arrives.

OBSERVE

What happened?

Where and when
Source evidence
Confidence

TRACK

What is true now?

Video plus records
Changing site state
History that matters

PREDICT

What happens next?

Likely outcomes
Uncertainty
Test against reality

Research thesis. Start with commercial sites; extend to logistics, facilities and operations.

Prove each model earns its place

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Same evidence. New customers and future events.

Test	Baseline Model 2	Drako Model 2
Baseline Model 1	Baseline	Model 2 gain
Drako Model 1	Model 1 gain	Combined gain

Model 2 test

Beat a strong model given the same history.

Operational test

Accuracy, alert burden, latency and cost.

Open models can be starting components. Test data gains separately from architecture gains.

Large model rounds are real

Selected financings. Different stages and starting assets.

Company	Capital	Stage	Announced
General Intuition	$133.7M	Seed	Oct 2025
AMI Labs	$1.03B	Initial round	Mar 2026
Ineffable Intelligence	$1.1B	Seed	Apr 2026
TwelveLabs	$100M	Series B	Jul 2026

Strong teams can raise before a product.
Drako still needs its research leaders.

Funding precedents, not a Drako valuation or a market-wide sample.

The first 18 months

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Data and research progress alongside model sales.

0–2 months	2–4 months	4–8 months	8–12 months	12–18 months
Hire leaders **Inventory feed**	**Align episodes** **Collect reviews**	**Train models** **Compare gains**	**Paid pilots** **Prove costs**	**Expand tasks** **Add customers**

Deliverables
Versioned training data. Tested models.
Paying model customers.

Planning estimates. No hires or pilot commitments assumed.

Complete the company

The data asset is here. Assemble the research and sales engine.

HIRE

Research leaders

Video and time models
Researchers
Evaluation engineers

BUILD

Infrastructure

Data alignment
Reviewed outcomes
Efficient inference

AGREE

Commercial terms

Durable model rights
Brivo / Cobalt licenses
External model sales

Roles and agreements to secure. No named team commitments assumed.

Target initial raise

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$100M

Build the data system.
Train both models.
Sell model access.

ILLUSTRATIVE ALLOCATION

Use	Capital
Team	$35M
Training and compute	$25M
Data and review systems	$20M
Deployment and customers	$10M
Reserve	$10M
Total	$100M

Targets: a repeatable pipeline, model gains and paid deployments.

Planning allocation, not a fully costed budget or runway promise. Financing price to be negotiated.

Fit for Drako’s tasks

Video analysis is established. Persistent site memory is less demonstrated.

Program	Video understanding	Across time	Combines signals	Prediction	Adaptation
01 TwelveLabs	4	3	4	0	2
02 Google Gemini	4	3	3	1	2
03 Google Genie	1	2	2	3	1
04 NVIDIA Cosmos	4	3	3	4	4
05 Meta V-JEPA	3	2	3	3	4
06 GI / MIRA	1	3	3	3	3
07 World Labs / Atlas	2	3	3	3	1
08 Runway GWM	1	3	3	3	1
09 Runway Praxis	2	2	3	4	4
10 Odyssey	2	3	3	4	2
11 Ambient Pulsar	3	3	3	1	1
12 Milestone Hafnia	3	2	1	0	3

0 No public evidence · 1 Limited · 2 Moderate · 3 Strong · 4 Extensive

Ratings describe public evidence, not measured accuracy. Drako and AMI are unranked.

Public proof: access, tests and use

Look for model access, public tests and real use together.

Program	Model access	Evaluation	Real use	Technical detail	Runtime
01 TwelveLabs	4	3	3	2	3
02 Google Gemini	4	3	2	2	3
03 Google Genie	4	1	2	1	3
04 NVIDIA Cosmos	4	4	2	4	4
05 Meta V-JEPA	4	3	1	4	3
06 GI / MIRA	3	3	1	4	3
07 World Labs / Atlas	4	2	1	2	3
08 Runway GWM	1	2	0	3	2
09 Runway Praxis	4	3	2	4	3
10 Odyssey	3	4	2	2	3
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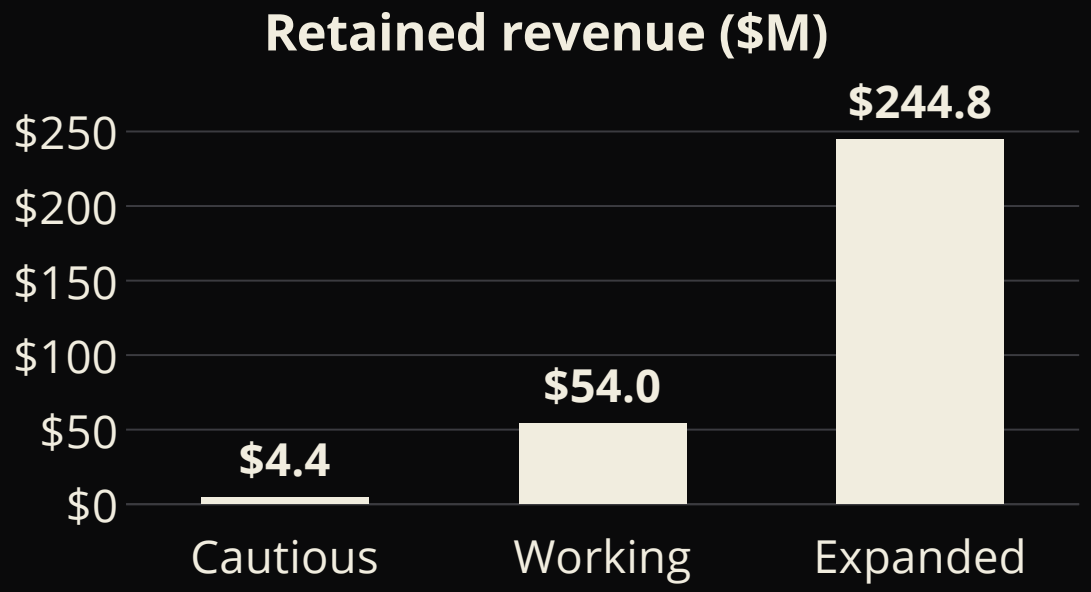
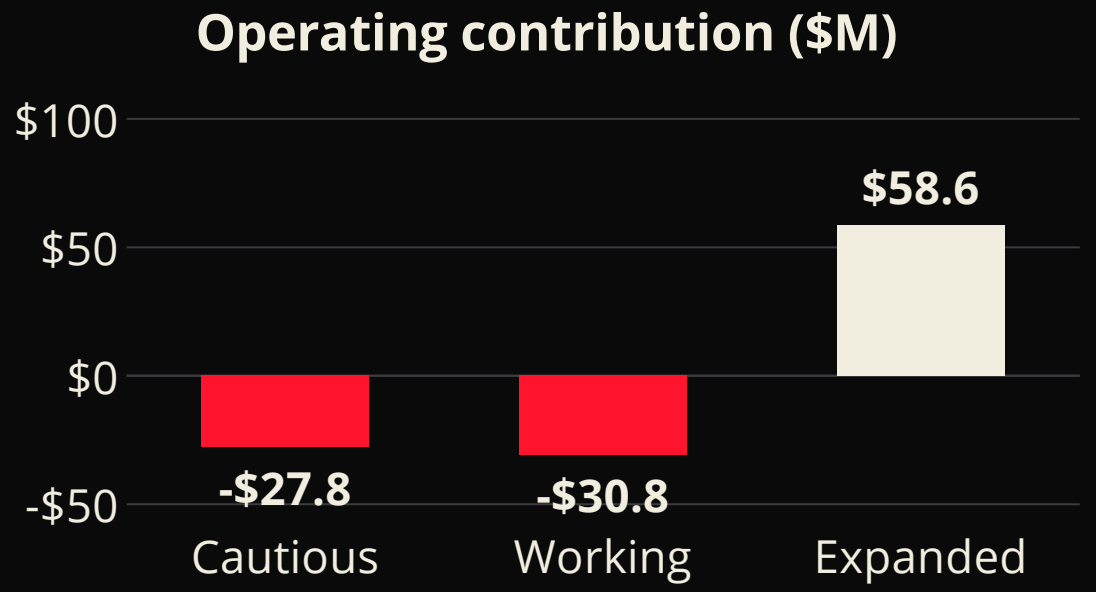
Early sales through Brivo and Cobalt

Illustrative 2031 scenarios. The broader model opportunity is additional.





More capital after the first $100M, through 2031:
Cautious $20.4M Working $95.6M Expanded $76.7M

Scenario, not forecast or ARR. Both model programs need full costing. Not a model-market ceiling.