



**The Intelligence Layer for India's SMEs**

# Pitch Deck

Dabby — The AI Financial Workspace for  
India's Finance Teams

[Explore Now](#)

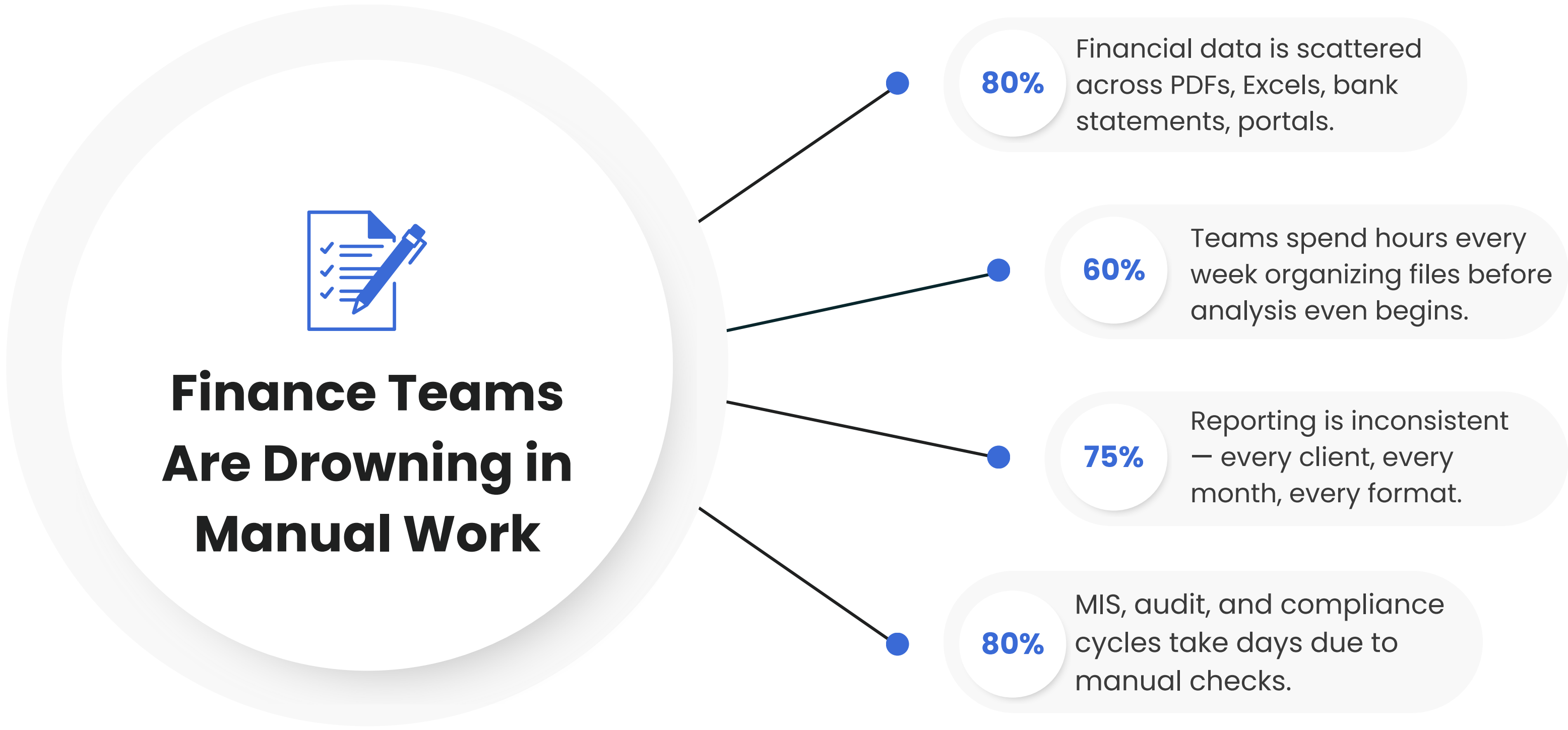
# What Drives Us

## Our Mission

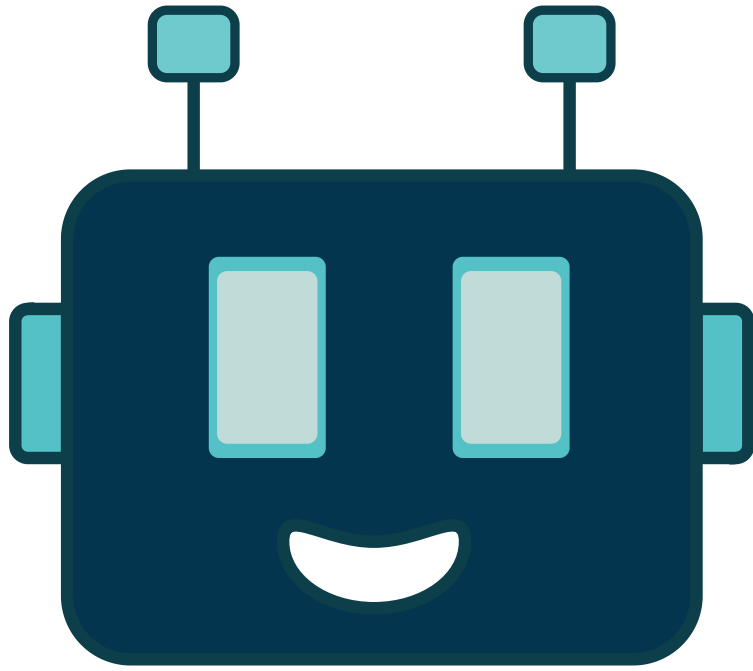
To empower **finance teams** — CA firms, VCFOs, SMEs, and analysts — with an AI workspace that understands their data, automates workflows, and generates consistent financial clarity without manual effort.



# The Problem



# Meet Dabby



Meet Dabby — Your AI  
Financial Workspace

- Work faster without formulas or macros

- Ask questions in natural language

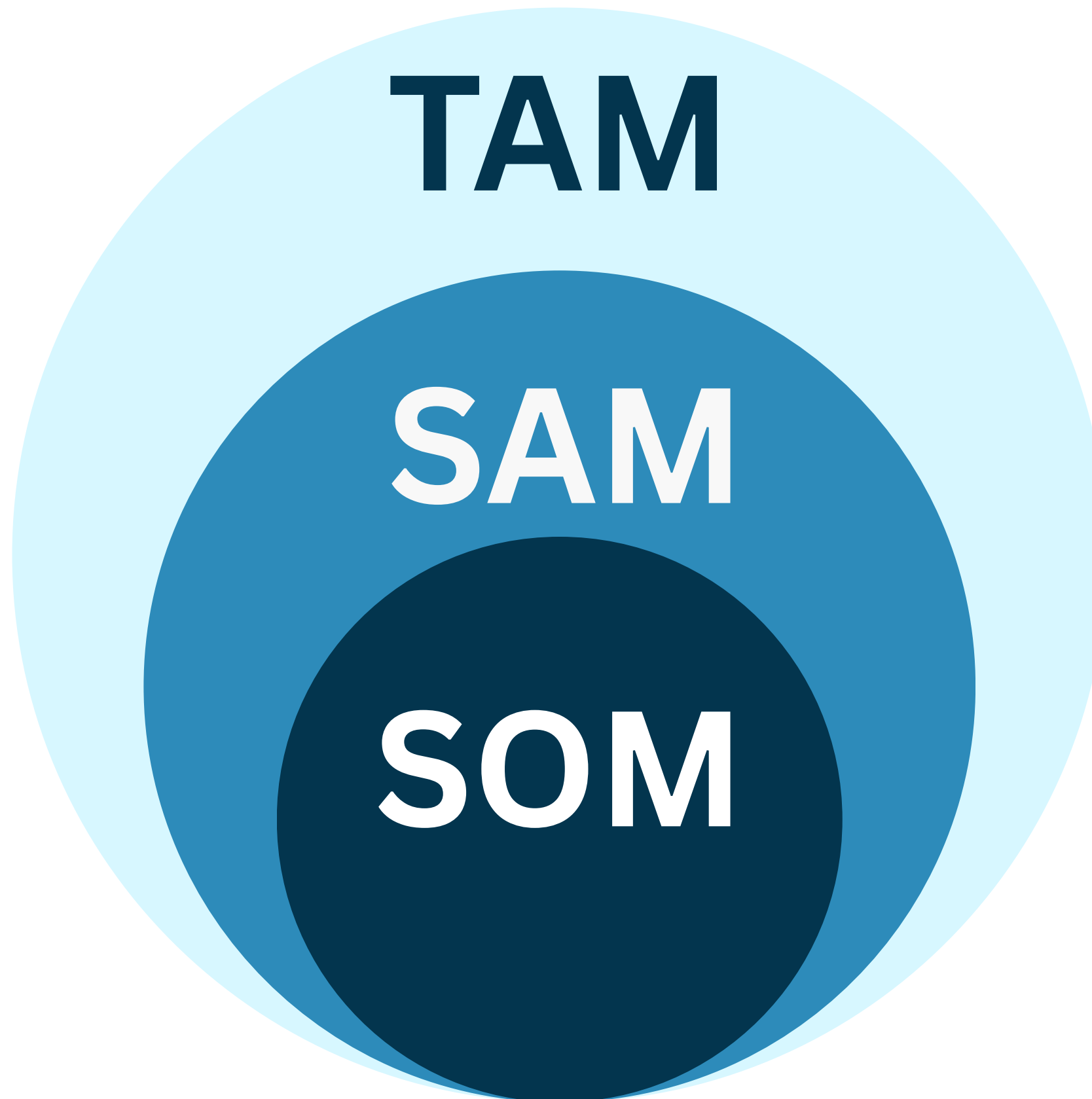
- Analyse financial docs instantly

- Generate MIS & audit reports

- Visualize KPIs

- Maintain organized workbenches

# Market Opportunity



- **India's SME sector: 63M businesses**
- **140K+ CA firms**
- **3M+ finance professionals**
- **90% still rely on manual Excel workflows**
- **Growing adoption of AI & automation in finance**

**Phase 1 (Now → 6 Months)**

**Dabby V1 — AI Workspace for Finance Teams**

**Focus:** Fix fragmented finance workflows.

**Includes:**

- Quick Analysis (PDFs, Excels, ledgers → instant insights)
- Report Builder (P&L, BS, MIS, audit summaries)
- Finance Workbench (organized storage for all financial docs)
- Visual Dashboards (auto KPIs & charts)

**Why it matters:**

Gets adoption inside CA firms, VCFO teams, MIS & audit teams — proving core product-market fit.

**Phase 3 (18 → 36 Months)**

**Local-First AI Infrastructure for Banks/NBFCs**

**Focus:** Secure, compliant on-prem AI.

**Includes:**

- Full on-prem deployment
- RBI/SOC-2 compliant AI pipelines
- Sensitive document processing (statements, loan files, risk docs)
- Enterprise extensions for audit, compliance & underwriting

**Why it matters:**

Positions Datalis as the financial AI infrastructure layer for India — a long-term enterprise play.

Phase 1

Phase 2

Phase 3

**Phase 2 (6 → 18 Months)**

**SLM-Powered Financial Intelligence**

**Focus:** Company-trained AI models for deeper accuracy.

**Includes:**

- Small Language Models trained on each company’s data
- Private vector memory for secure retrieval
- Template-aware generation (firm-specific report formats)
- Workflow Agents for monthly close, reconciliation, variance checks

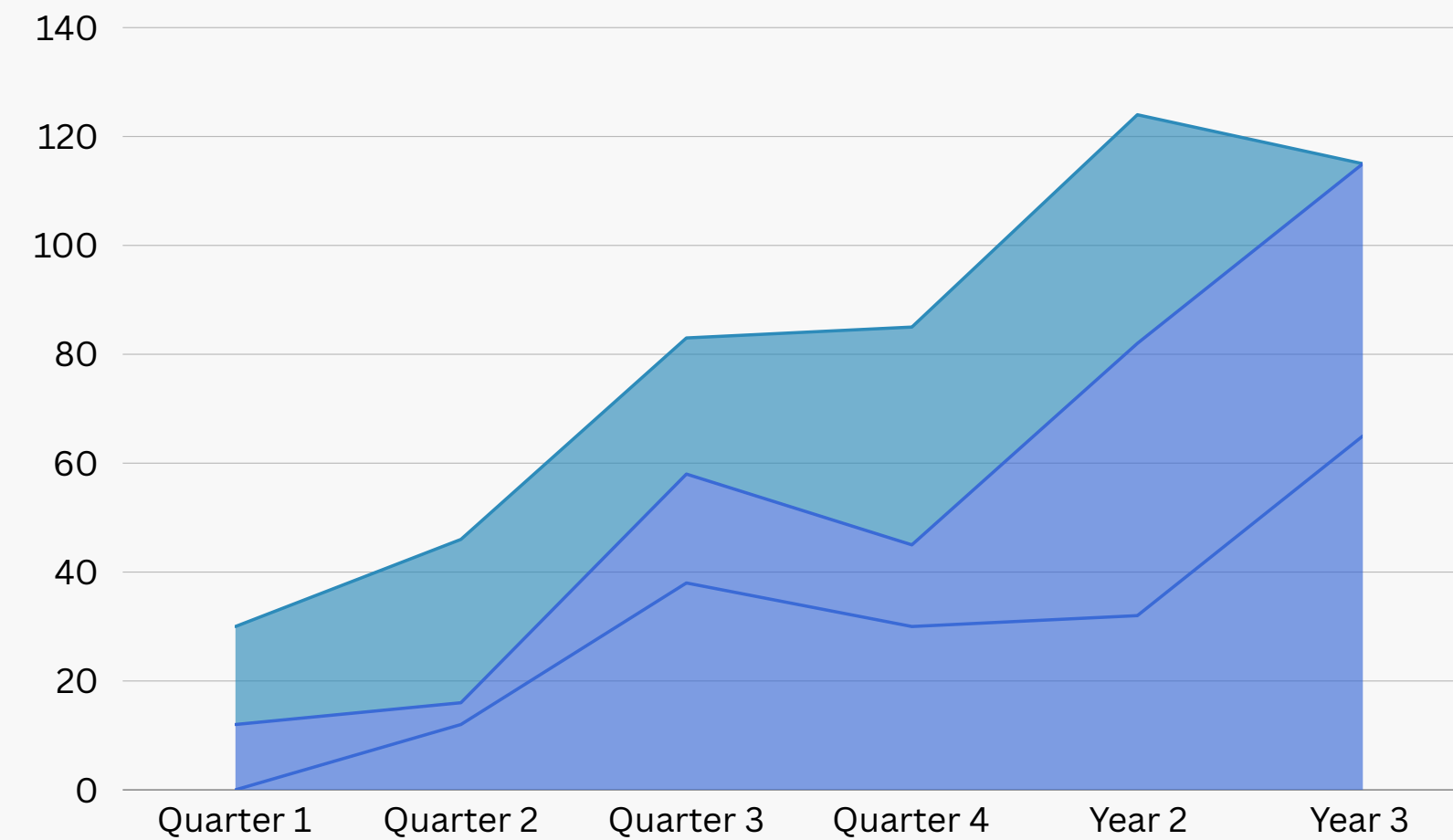
**Why it matters:**

Creates defensibility — every company gets its own “AI brain”.

# Revenue & Pricing

## Revenue Model:

- SaaS: ₹499–₹999/month
- Usage-Based: Report Gen, Agent Credits
- Enterprise Plans for Firms



# The Competitive Mapping

**Ai Product**

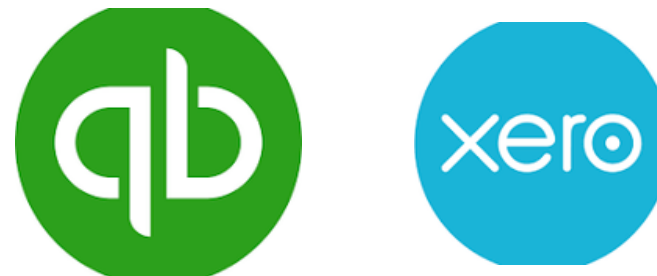
**General**



**Specific**



**Finance  
Software**



**Genius**  
Top Tax Return Filing Software  
for Professionals



**AI that adapts to  
client/company  
financial data**



**Report Builder  
using user-  
uploaded  
templates**



**Quick Analysis +  
Visual  
Dashboards  
from raw files**



## **Why Dabby Wins**



# Revenue-Driven GTM Plan

## ICP Focus (Now– Q4 2025):



- CA firms, VCFOs, audit teams
- (WhatsApp, LinkedIn, CA networks)

## Land & Expand (Q4–Q1 2025/26)



CA firms are the gateway to thousands of SMEs.

Once a firm adopts Dabby for internal workflows (audit, MIS, reporting

## Platform Expansion (2026)



- API partners ( Razorpay, QuickBooks)
- Enterprise connectors (Tally, Zoho, GST APIs)

# The Moat:- Our Defensibility



## Understands Business Language

Ask questions like "Show me top clients with delayed payments", Dabby gets it.



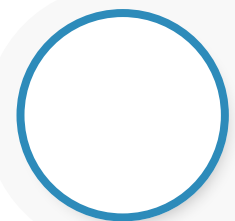
## Learns Your Data

From sales ledgers to audit PDFs, Dabby adapts to structure and context.



## Works with Your Tools

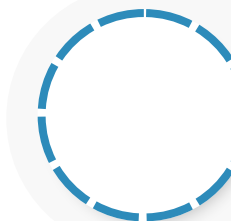
Excel, Tally, Firebase, PostgreSQL, and even messy PDFs



Agentic RAG IP

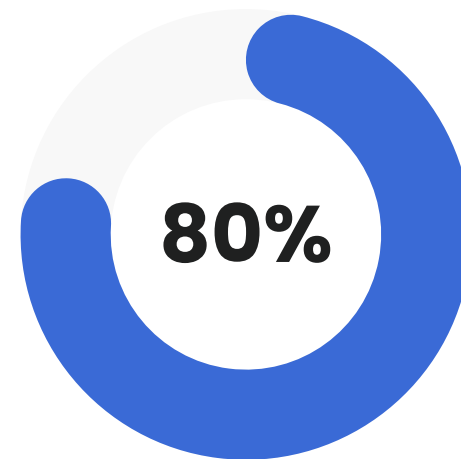


Local-first architecture

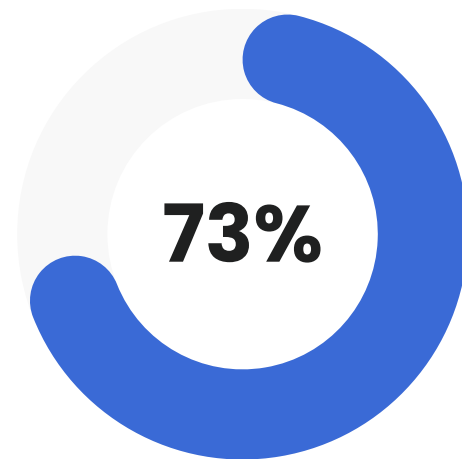


Template-Aware Generation

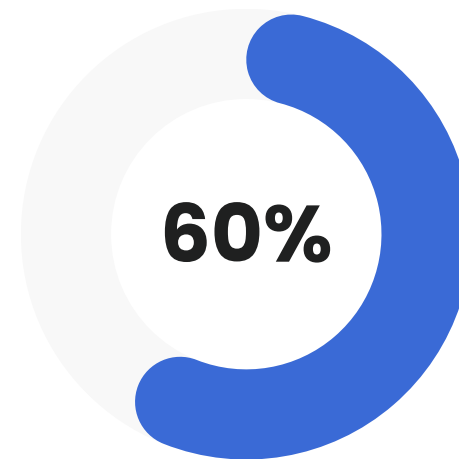
# Early Validation & Demand



**Early users  
loved trial**



**200+ data  
inferences**



**100K+ tokens  
used**

- Completed V1 beta with 50+ early users
- Tested by 5 CA firms across audits & client reporting
- Processed 100k+ AI tokens during our early experiments
- Demonstrated at Mumbai Tech Week, generating strong inbound interest
- Now rebuilding on a stable infra with a focused Early Access Program

# Team Datalis



**Chirayu Marathe**

Head of App



**Medhansh K**

CEO



**Parth Parmar**

CTO



**Roshan Ajith**

Head of Security

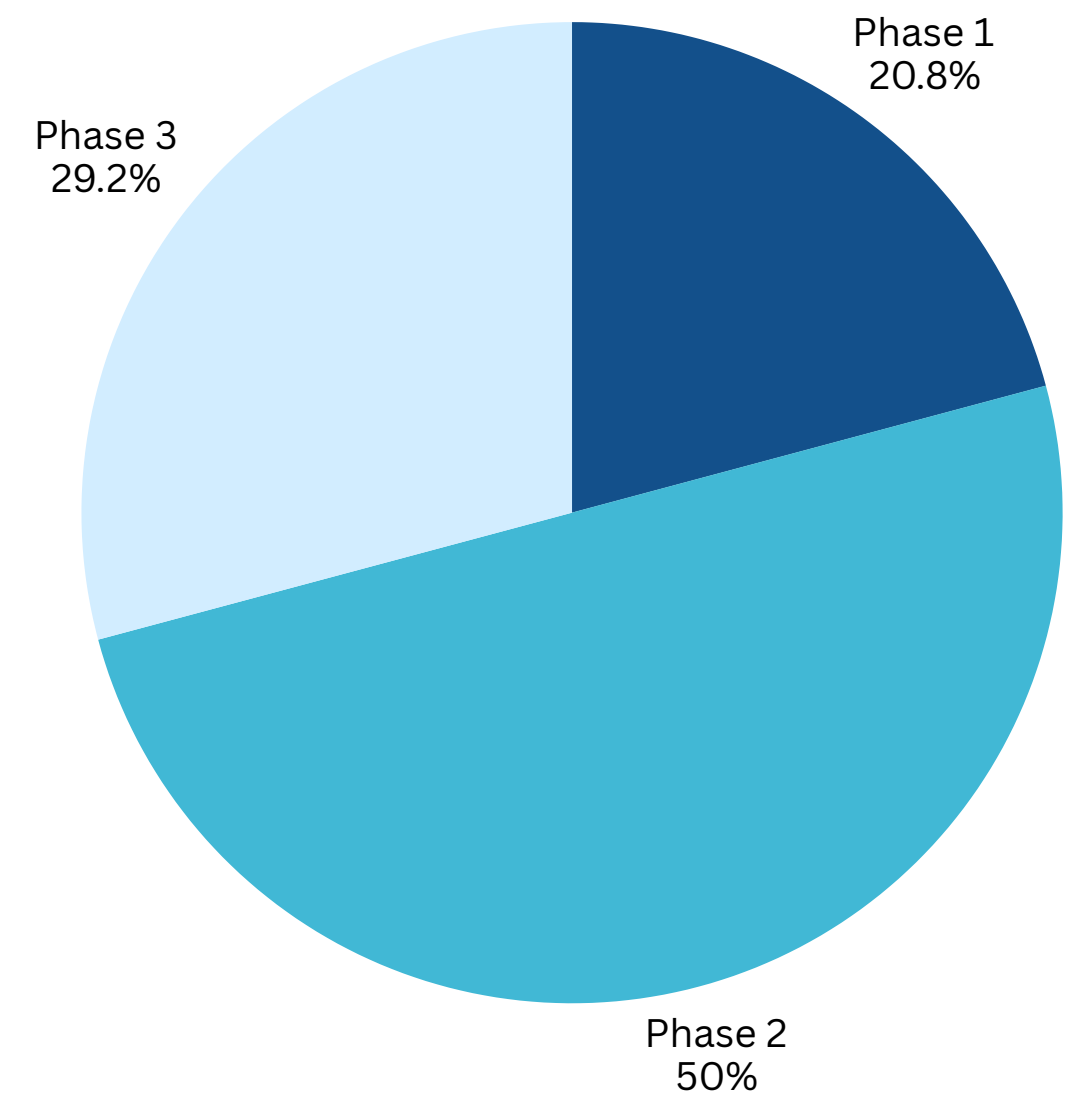
## Support Network

We actively consult leaders across Databricks, Tally, Deloitte, and top CA firms to refine our financial workflows, AI systems, and go-to-market strategy

# Funding Requirements

## ₹1.2 Cr

We are raising 1.2 Cr in our round.



**Phase 1      30L**

**Timeline - 3 Months**

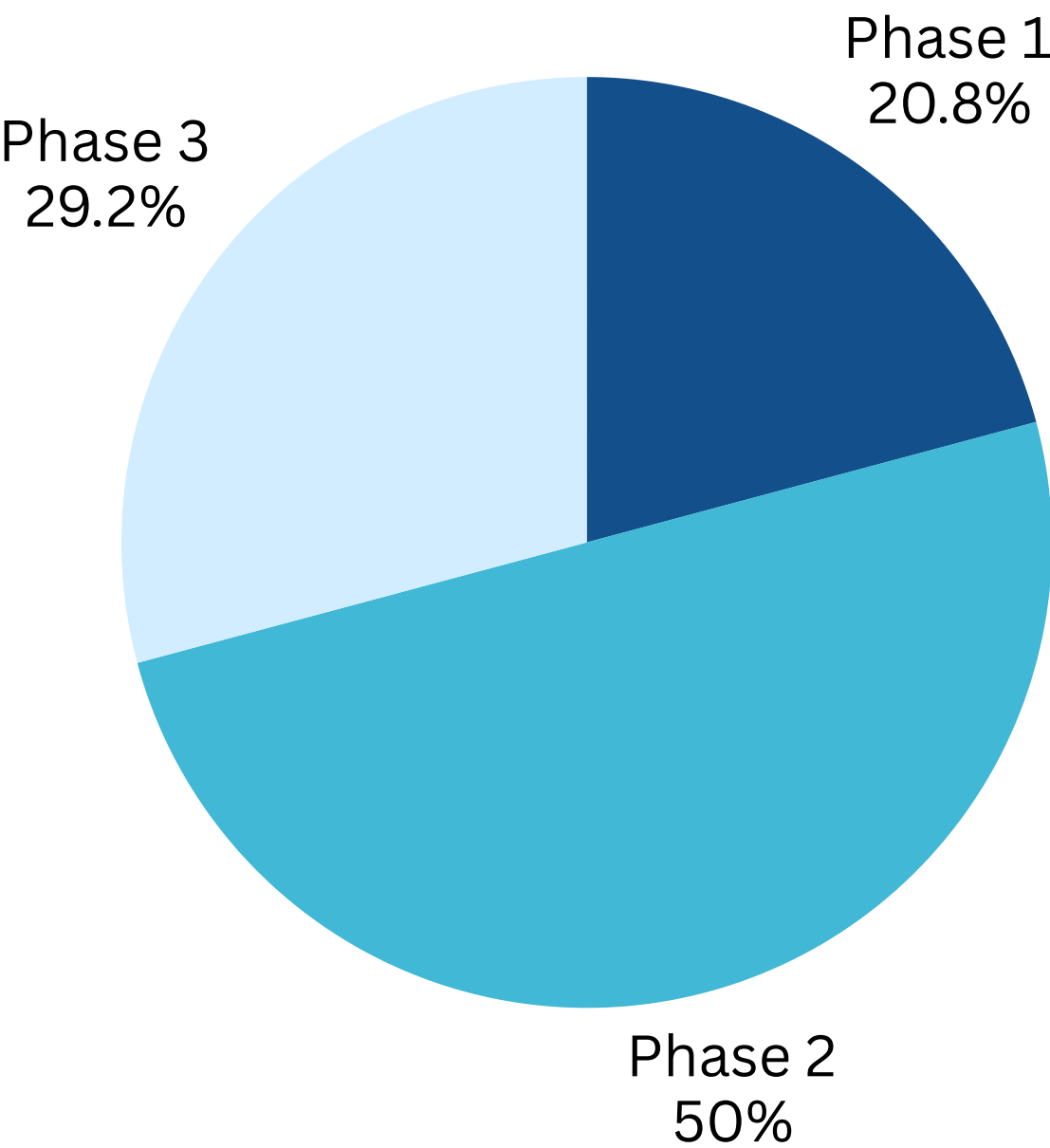
**Phase 2      55L**

**Timeline - 7 Months**

**Phase 3      35L**

**Timeline - 5 Months**

# Fund Utilization



Phase	Allocation (₹)	Timeline	Burn Focus (~monthly)	Purpose / Milestones
Phase 1: Dabby V1 → Market-Ready	₹30,00,000	Months 0–6	~₹5L/month	- Hire lean core team (2 engineers + 1 AI/ops) - Improve Quick Analysis, Report Builder & Dashboard stack - Build CA-firm
Phase 2: SLM Development + SME Expansion	₹55,00,000	Months 6–14	~₹6.8L/month	- Build company-specific SLMs (GPU, fine-tuning infra) - Add template-aware generation (audit/MIS) - Finance workflow agents
Phase 3: Compliance & Enterprise Readiness	₹35,00,000	Months 14–18	~₹5.8L/month	- Security, data-governance & audit trail systems - On-prem compatible pipelines for banks/NBFC conversations -

# Thank You



[www.datalis.in](http://www.datalis.in)  
MAIL US AT :-  
[OPPORTUNITIES@DATALIS.IN](mailto:OPPORTUNITIES@DATALIS.IN)