



**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

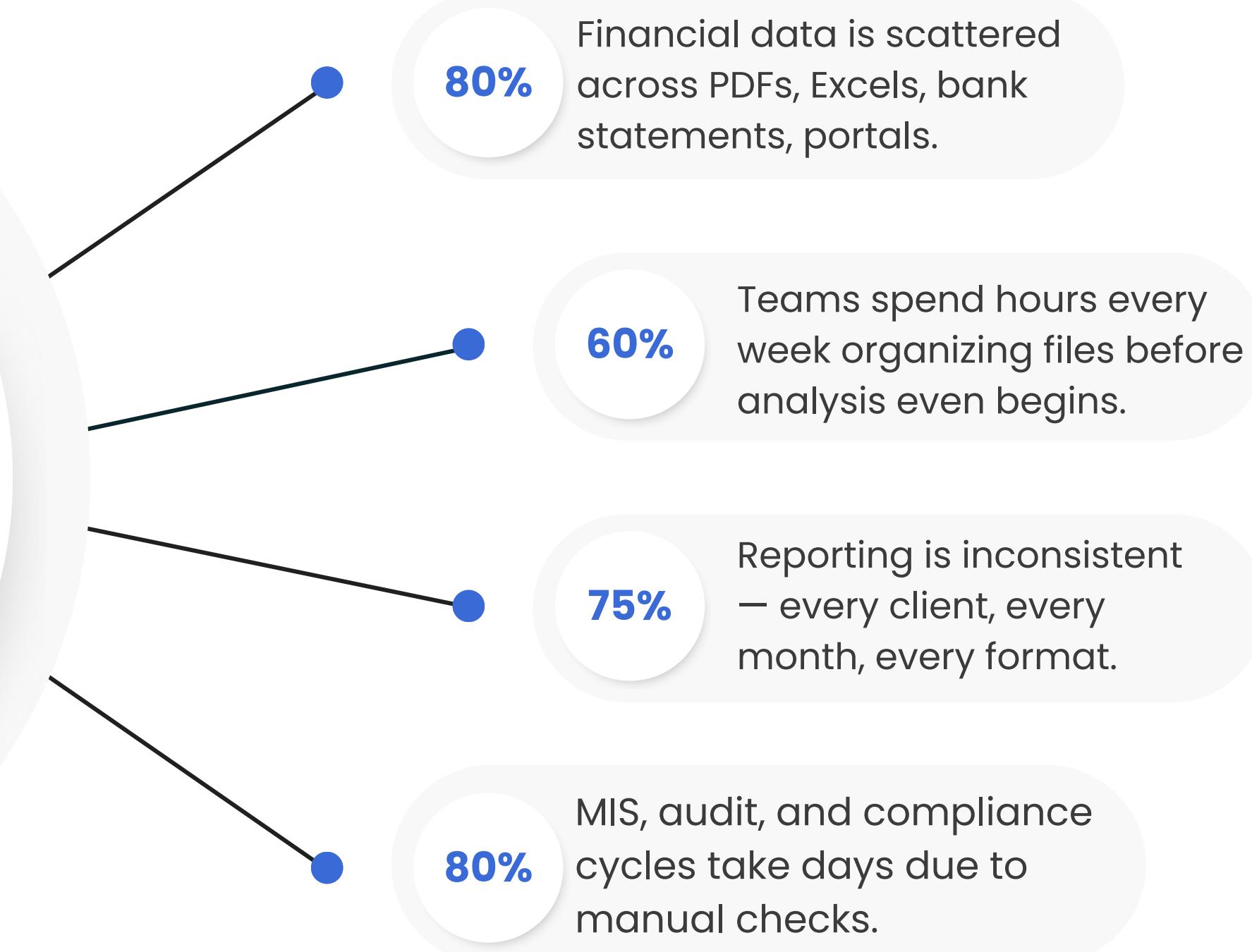
To empower **finance teams** – CA firms, VCOFs, SMEs, and analysts – with an AI workspace that understands their data, automates workflows, and generates consistent financial clarity without manual effort.



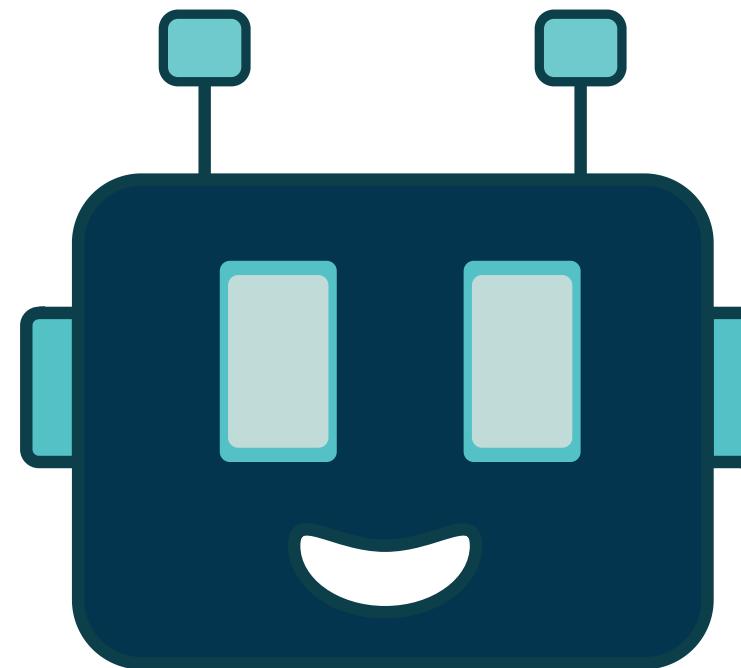
# The Problem



**Finance Teams  
Are Drowning in  
Manual Work**



# Meet Dabby



Meet Dabby – Your AI  
Financial Workspace

- Work faster without formulas or macros

- Ask questions in natural language

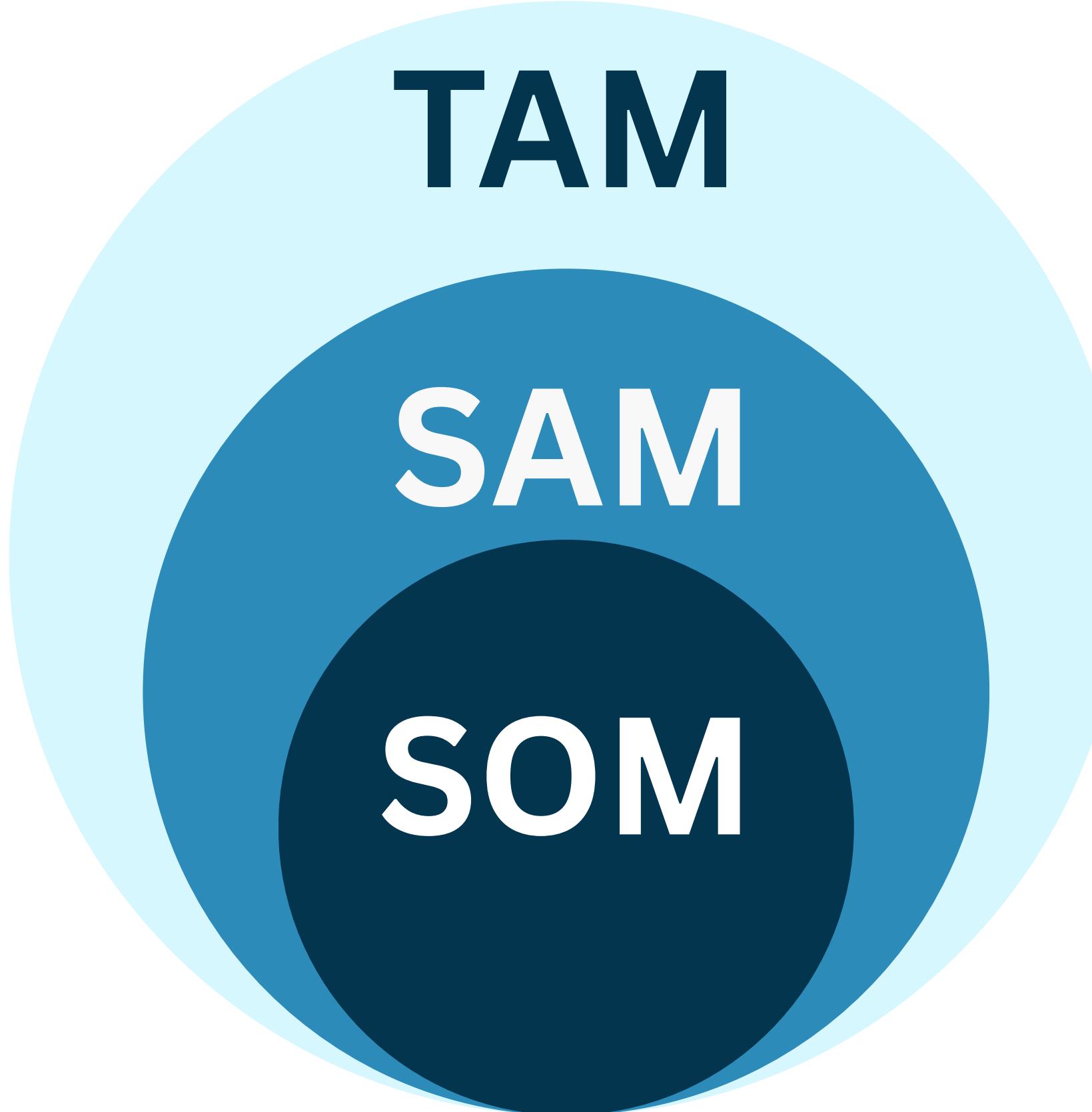
- Analyse financial docs instantly

- 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:**

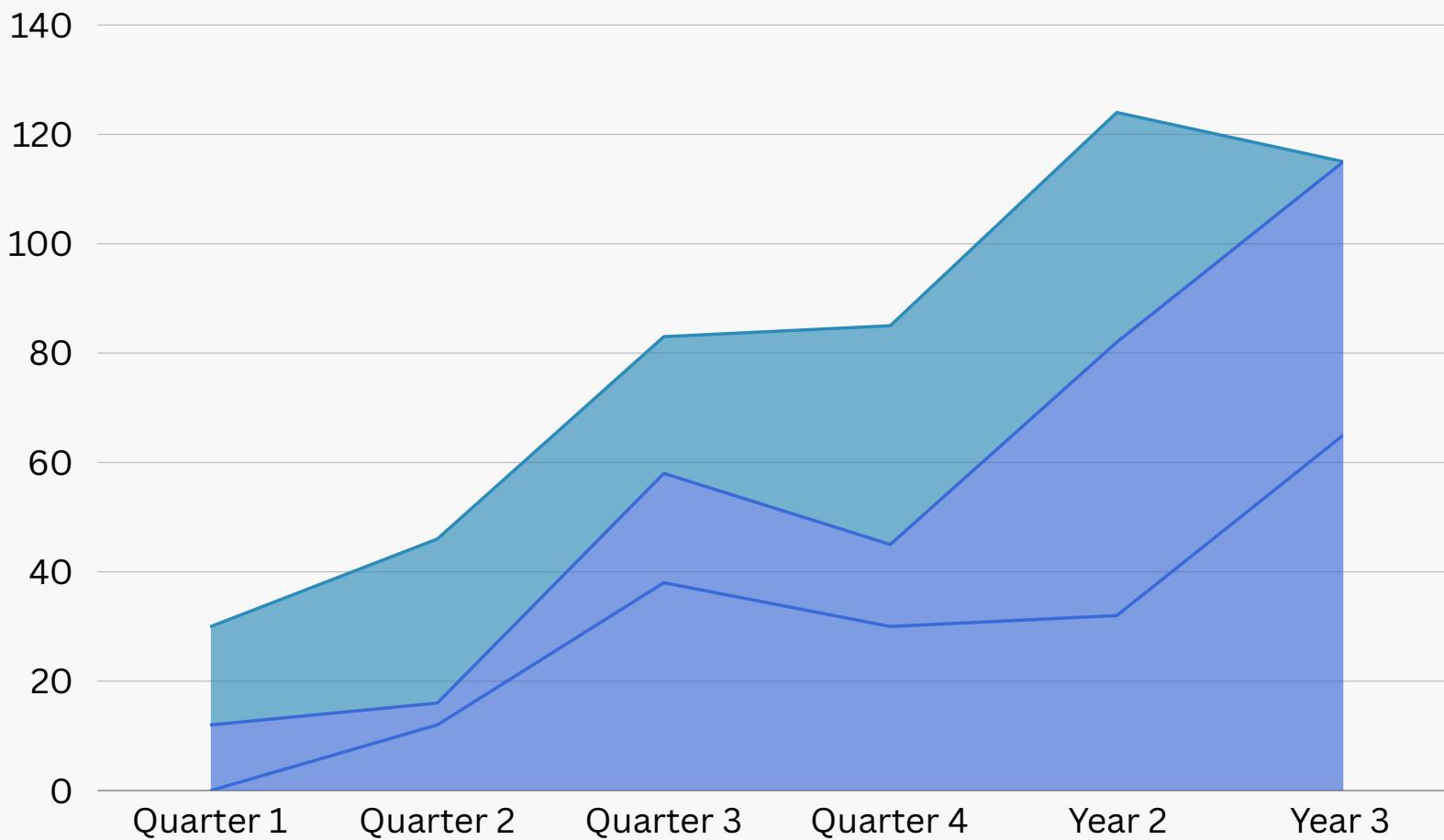
Creates defensibility — every company gets its own “AI brain”.



# Revenue & Pricing

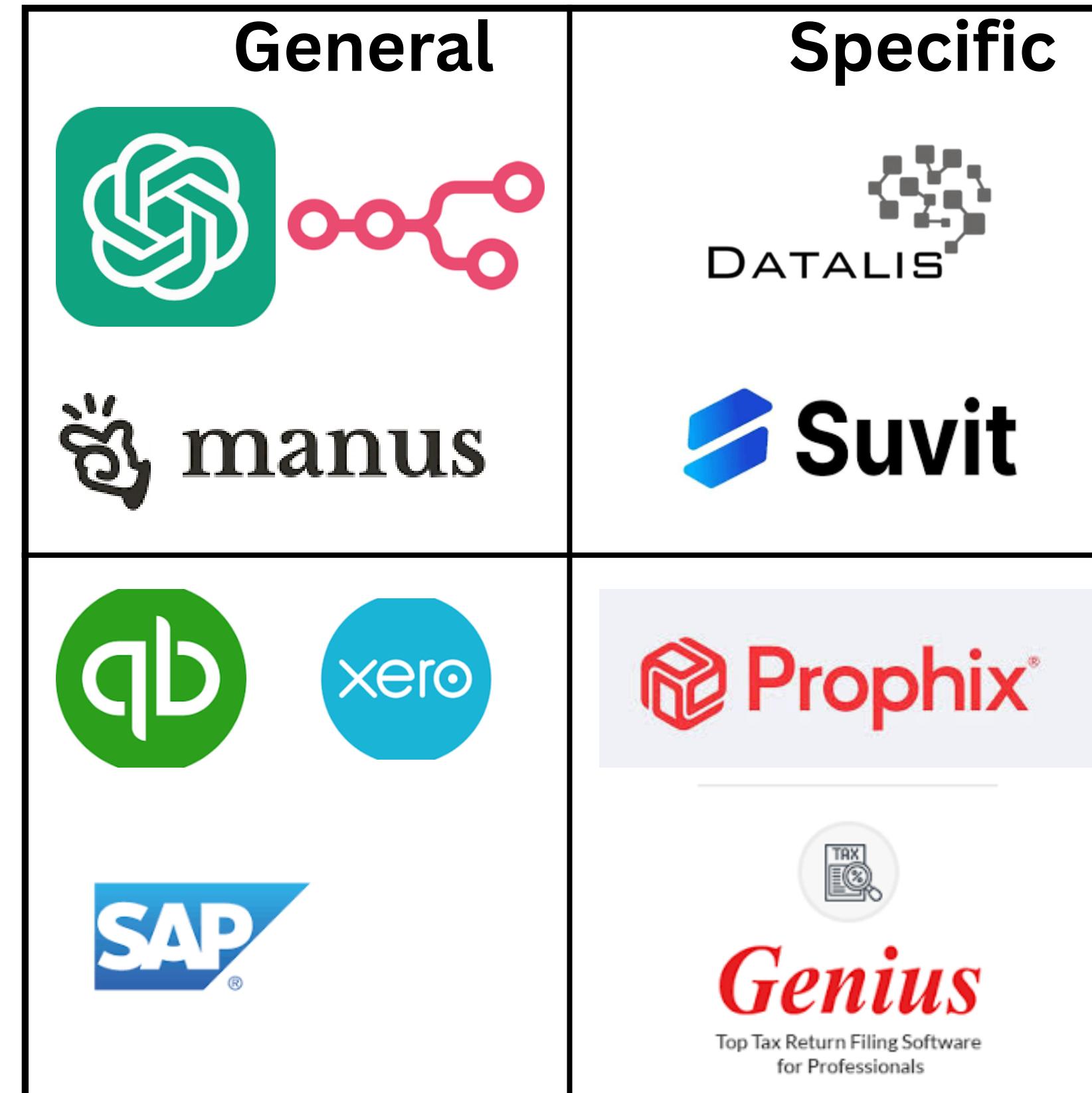
## Revenue Model:

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



# The Competitive Mapping

Ai Product  
Finance Software





**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

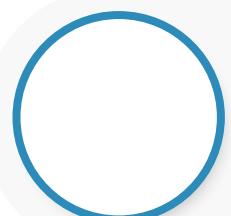
Ask questions like "Show me top clients with delayed payments", Dabby gets it.

## 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



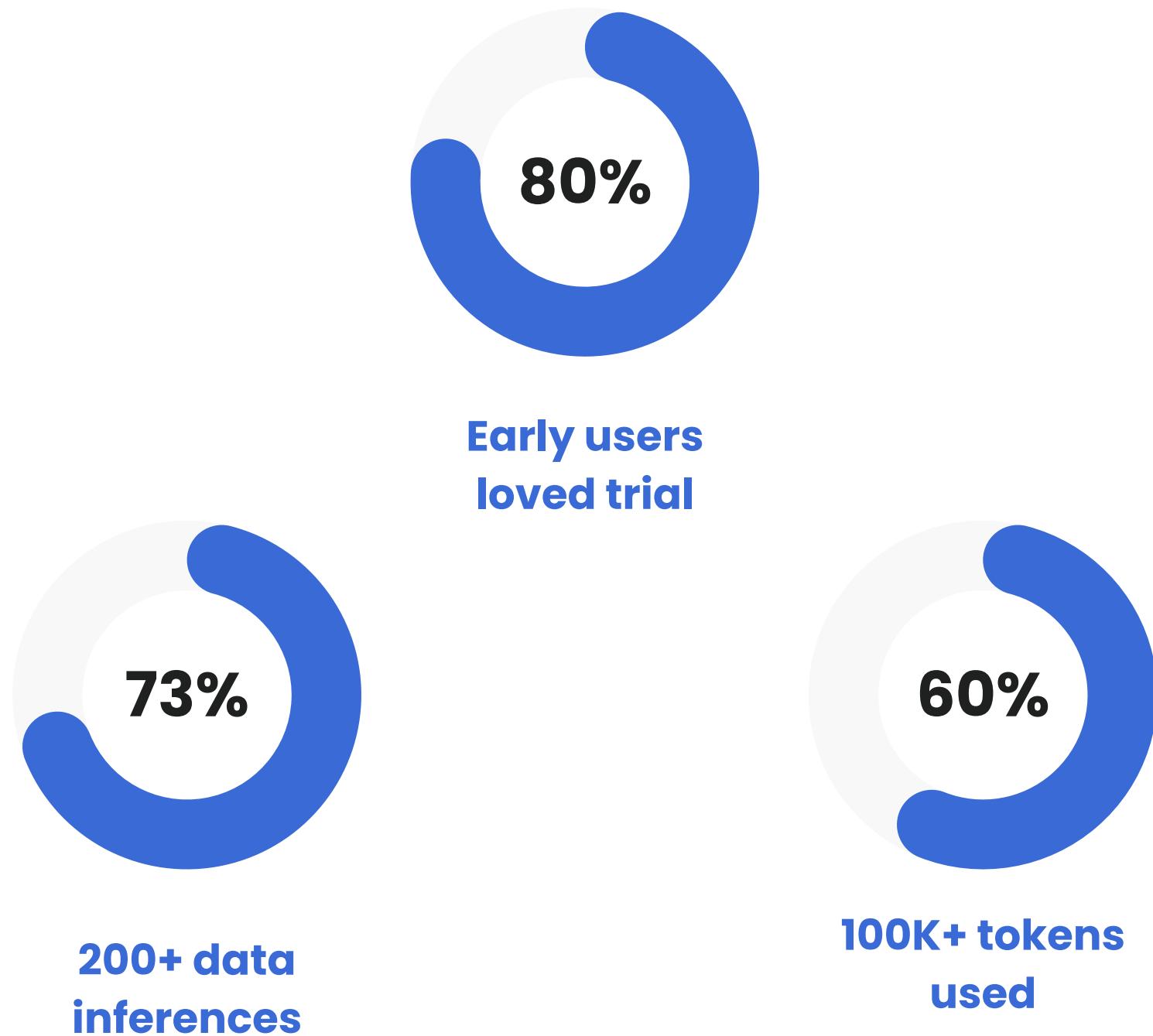
Agentic RAG IP



Local-first architecture



Template-Aware Generation



## Early Validation & Demand

- 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

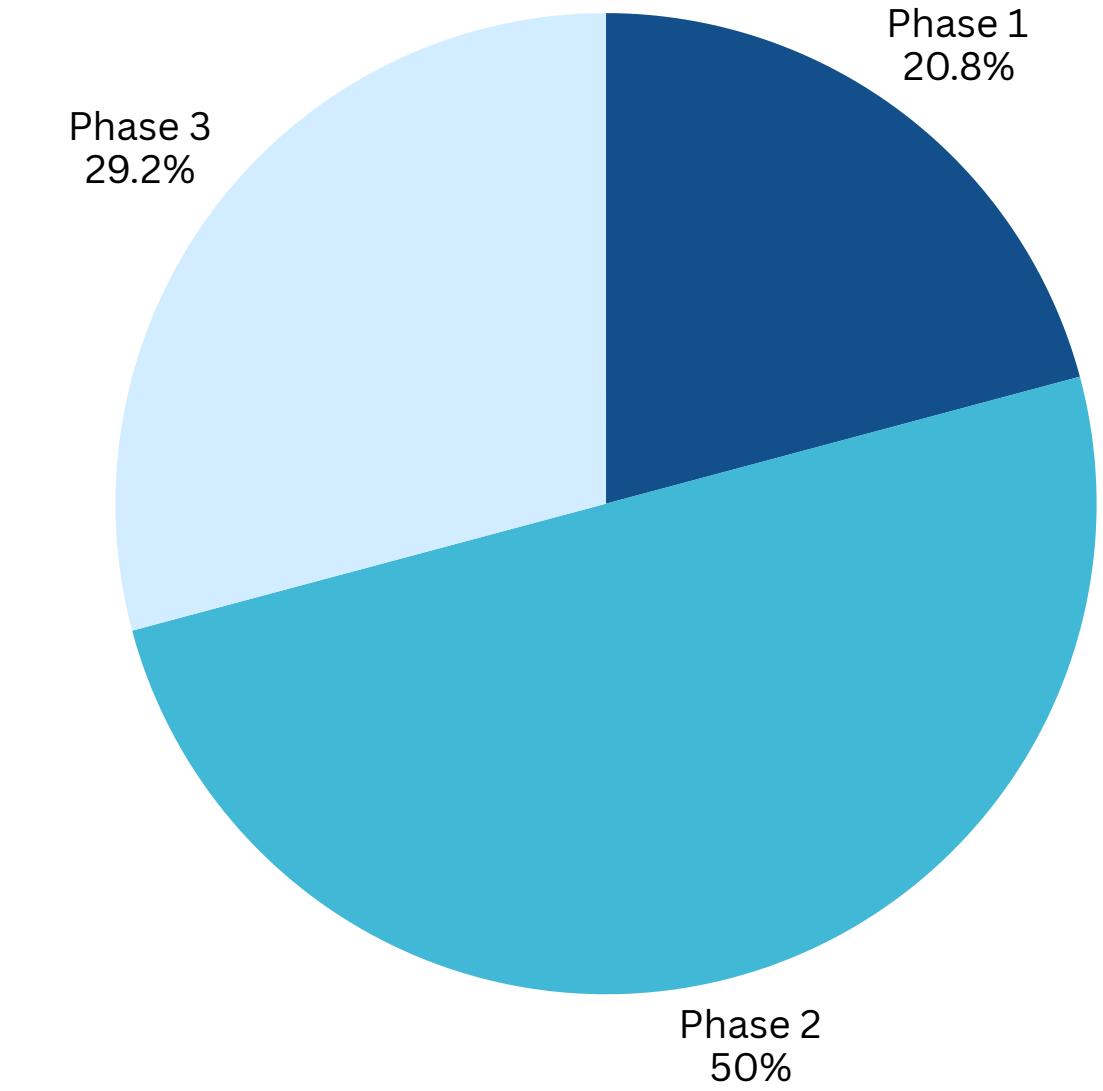
## Support Network

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

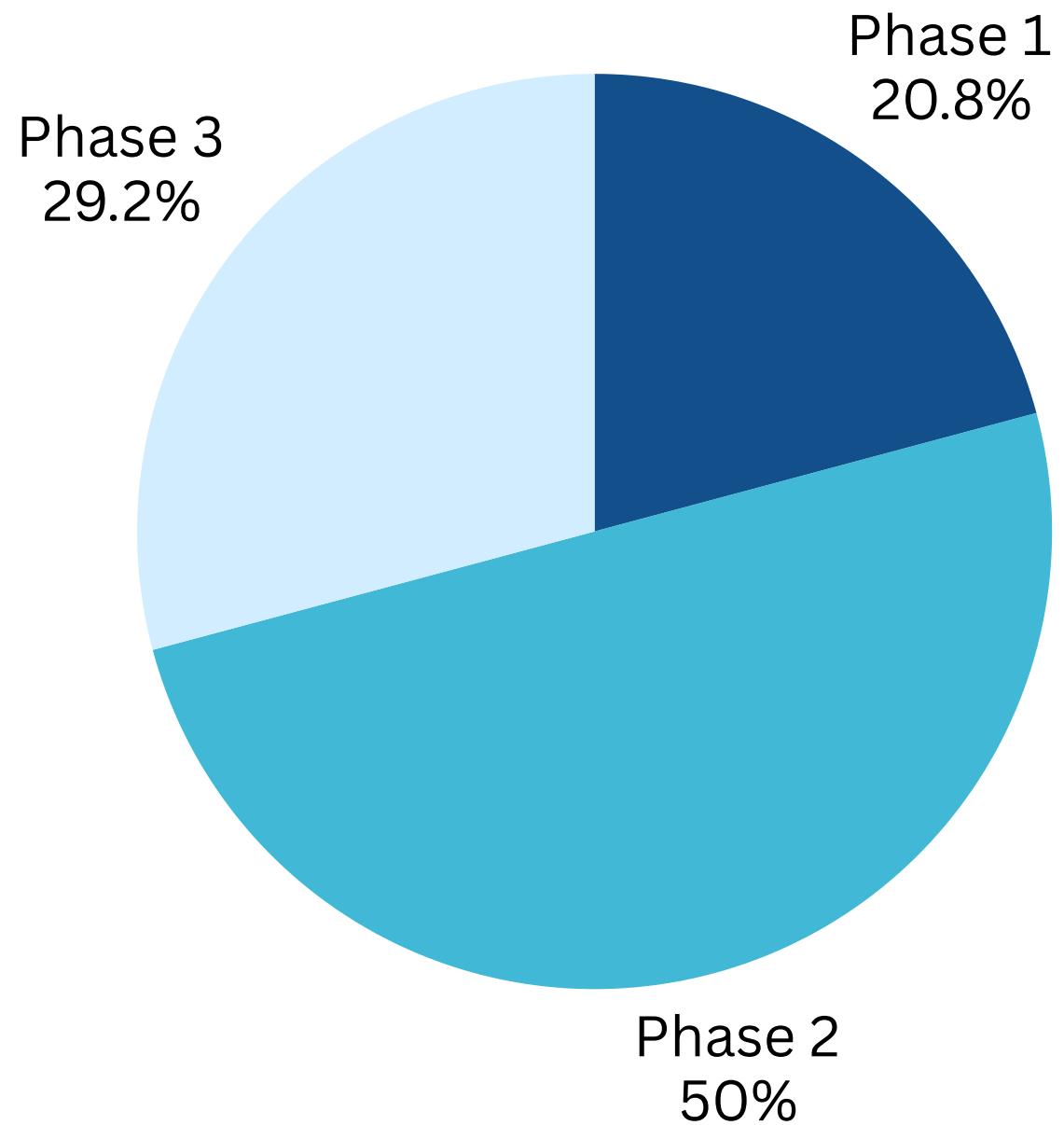
Phase 2 55L

Timeline - 7 Months

Phase 3 35L

Timeline - 5 Months

# Fund Utilization



Phase	Allocation (₹)	Timeline	Burn Focus (~monthly)	Purpose / Milestones
<b>Phase 1: Dabby V1 → Market-Ready</b>	₹30,00,000	Months 0–6	~₹5L/month	<ul style="list-style-type: none"> <li>- Hire lean core team (2 engineers + 1 AI/ops)</li> <li>- Improve Quick Analysis, Report Builder &amp; Dashboard stack</li> <li>- Build CA-firm</li> </ul>
<b>Phase 2: SLM Development + SME Expansion</b>	₹55,00,000	Months 6–14	~₹6.8L/month	<ul style="list-style-type: none"> <li>- Build company-specific SLMs (GPU, fine-tuning infra)</li> <li>- Add template-aware generation (audit/MIS)</li> <li>- Finance workflow agents</li> </ul>
<b>Phase 3: Compliance &amp; Enterprise Readiness</b>	₹35,00,000	Months 14–18	~₹5.8L/month	<ul style="list-style-type: none"> <li>- Security, data-governance &amp; audit trail systems</li> <li>- On-prem compatible pipelines for banks/NBFC conversations</li> </ul>



# Thank You



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