Generation Quarterly Newsletter – Spring 2026



How Physical World AI Could Reshape Our Economy

Generation IM | 11 March, 2026

Generation's first Roadmap Series article explores how "physical world AI" and the rapid development of robots that can perceive, reason about, and act in the real world could reshape our economy.

Read the blog post.



America's 70 Million Seniors Deserve Better. That's Why We're Investing in Chapter

Generation IM | 11 April, 2026

The Generation IM team announced Chapter's addition to its Growth Equity portfolio, helping lead the company's $100 million Series E. In the blog post, they explain why they believe Chapter is uniquely positioned to help ensure that, as AI transforms society, seniors have access to accurate information and impartial advice on Medicare plan selection.

Read the blog post.



AI Gore Discusses Sustainable AI and Climate Solutions at HumanX

Generation IM | 9 April, 2026

At the opening night of HumanX in San Francisco, Generation Chairman Al Gore joined Eric Topol, MD, author and executive vice president of Scripps Research, to discuss how leaders can build and deploy AI more sustainably and use it to address the climate crisis.

Read the LinkedIn post.



Power Prices, Grid Intelligence, and the Future of Energy with Dave Easton (Generation IM) and Sean Kelly (Amperon)

Smart Society Show | 17 March, 2026

Dave Easton joined the Smart Society Show to discuss how the rise of artificial intelligence is reshaping energy systems and where the biggest opportunities lie.

Listen to the episode.



Viewing AI Through a Sustainability Lens

Generation IM | 20 November, 2025

This insights piece explores the impact of AI on the transition to a sustainable economy, highlighting both the opportunities and risks associated with AI expansion, including rising demand for data centre infrastructure, growing pressure on energy and water resources, and the need to align AI development with net-zero goals.

Read the blog post.

Growth Portfolio Company News:

AI Medicare Navigation Startup Raises $100 Million

Bloomberg Tech | 9 April, 2026

Chapter raised a $100 million Series E round, with participation from Generation Investment Management, to invest in AI technology and new products that help seniors navigate Medicare and broader healthcare needs. Chapter CEO Cobi Blumenfeld-Gantz spoke to the company's growth of more than 3x last year to $100 million in revenue.

Watch the broadcast segment.

Pivot Bio Launches Multiyear Nitrogen Price Lock Program Amid Fertilizer Market Volatility

iGrow News | 2 April, 2026

Pivot Bio launched a multiyear nitrogen price and supply assurance program for the 2026 through 2028 growing seasons. The company also announced a partnership with Red Reef Partners and shared new corn silage data supporting the performance of its nitrogen solutions.

Read the article.

project44 Acquires LunaPath AI to Accelerate AI Agent Orchestration Across Global Supply Chains

FreightWaves | April 9, 2026

project44 acquired LunaPath AI to strengthen AI agent orchestration across global supply chains. The deal is expected to enhance workflow automation and execution across the company's logistics platform.

Read the article.

Back Market: What Can Tech Teach Fashion About Scaling Circularity?

Vogue Business | 26 February, 2026

Back Market CEO and Co-Founder Thibaud Hug de Larauze spoke with Vogue about how the company is scaling circularity in consumer electronics through its refurbished-tech marketplace. Back Market's global growth, trade-in and resale partnership with Bouygues Telecom, and trust-based model built on professional refurbishers and warranties were also featured.

Read the article.

How One AI Company Is Helping Businesses Navigate Trump's New Tariff Chaos Following the Supreme Court Ruling

Fortune | 24 February, 2026

Altana is helping businesses navigate the growing complexity of tariffs and trade disruptions through its AI-powered supply chain platform. Increased demand for Altana's tariff calculator and scenario planning tools reflects companies' growing need for greater visibility into their extended supplier networks as they plan for supply chain shocks amid increasingly complex trade rules.

Read the article.

Study Finds Active Grid Response Technology Improves Power Reliability, Mitigates Wildfire Ignitions

Utility Dive | 4 February, 2026

Gridware shared new study findings showing its Active Grid Response technology improved power reliability and helped reduce wildfire ignitions in PG&E's service territory. The results also showed lower outage durations and a strong benefit-cost ratio.

Read the article.

Americans Are Buying More Secondhand Tech, Thanks to Tariffs

Wall Street Journal | 4 February, 2026

Back Market CEO and Co-Founder Thibaud Hug de Larauze spoke with The Wall Street Journal about rising U.S. demand for secondhand technology as tariffs push consumers toward more affordable refurbished devices. Back Market's recent U.S. sales growth reflects broader momentum in the refurbished-tech market.

Read the article.

Spring Health Acquires Alma to Boost Mental Healthcare

MobiHealthNews | 30 January, 2026

Spring Health acquired Alma to expand its reach in mental healthcare and extend its AI capabilities. April Koh will continue as CEO of Spring Health, while Alma will continue operating separately under CEO Harry Ritter.

Read the article.

Breaking through AI's memory wall with token warehousing

VentureBeat | 15 January, 2026

WEKA CTO Shimon Ben-David joined VentureBeat CEO Matt Marshall at their AI Impact Series to discuss the industry's emerging "memory wall" and its implications for scaling stateful agentic AI. The conversation outlined WEKA's token warehousing approach as a new way to think about memory for AI systems that retain and build on context over time.

Read the article.

Pediatric Primary Care Needs Change Now

Fast Company | 29 December, 2025

Elation Health CEO and Co-Founder Kyna Fong wrote about the need to improve pediatric primary care, emphasizing how AI can support preventive care through Elation's new AI-enabled pediatric tools for visits, screenings, prescribing, and growth tracking.

Read the byline.

Rising healthcare costs are testing small businesses

Fast Company | 18 December, 2025

Gusto Co-Founder and Chief Product Officer Tomer London spoke about how rising healthcare costs are putting pressure on small businesses and making it harder to hire and grow.

Read the article.

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