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Subject: ⚡🔌 €700M Grid Revolution
Date: 29 July 2025 at 20:03
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July 29, 2025 | [Read C](#)



€700M Grid Revolution

Energy Infrastructure Explodes

Dear Paul,

As late July 2025 unfolds, mobility advances through **autonomous infrastructure and e-mobility platforms**, with **Lumotive** securing **\$14 million** from **Amazon's Industrial Innovation Fund** to reach **\$59 million** in **Series B** funding for lidar chip production, while Finnish component maker **Donut Lab** raises **€25 million** to scale its modular EV platform and open a U.K. R&D hub, and **Lyft** partners with **Benteler Mobility** to integrate U.S.-made autonomous shuttles into its ride-hailing network starting in late 2026 as part of its broader strategy to scale physical-AI vehicle deployments¹.

The **energy transition dominates with unprecedented infrastructure investments**—**Nautilus Solar's \$275 million** tax-equity partnership with **Greenprint Capital** represents one of the largest community-solar deals to date, spanning 25-30 projects across five U.S. states under a **\$2.5 billion** joint-venture platform, while **Hitachi Energy** and **E.ON's €700 million** transformer-supply framework for German grid upgrades underscores accelerating grid-hardware investment to integrate renewables, and **Fortum's €70 million** acquisition of **ABO Energy's** entire 4.4 GW Finnish wind pipeline—paying **€40 million** up-front plus **€30 million** in milestone payments—signals continued Nordic renewables expansion.

Physical AI experiences strategic consolidation and specialized funding with over **\$64 million** in disclosed investments—led by Chinese IT company **Cheetah Mobile's \$99.5 million** acquisition of a controlling **60.8% stake** in lightweight robotic arms provider **UFACTORY**, while defense applications gain momentum through Arlington-based **Rune Technologies' \$24 million Series A** led by **Human Capital** to modernize military logistics with its AI-enabled predictive logistics platform **TyrOS**, and Philadelphia-based **Asylon's \$26 million Series E** led by **Insight Partners** advances robotic security-as-a-service with autonomous drones and modified **Boston Dynamics** robot dogs.

Stay sharp,

Vitaly Golomb

Managing Partner

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Oilstainlab @ Car Week Investor Reception

Car Week in Monterey is the annual pilgrimage of auto enthusiasts from all over the world. Get early access to the **Luxury Collection** main event and join us on **August 14th** for an exclusive investor reception with **Oilstainlab**, makers of the revolutionary **HF-11**, world's lightest and most exhilarating supercar—a future unicorn. All the details and registration:

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Mobility

1. Lumotive Adds \$14 Million to Series B

Amazon's Industrial Innovation Fund joined Lumotive's programmable-optics round, bringing total Series B proceeds to \$59 million to ramp production of lidar chips for autonomous mobility.

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2. Donut Lab Closes €25 Million Seed Round

Finnish e-mobility component maker Donut Lab raised €25 million to scale its modular platform and open a U.K. R&D hub.

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3. STMicroelectronics to Acquire NXP MEMS Sensors Business for \$950 Million

Chipmaker STMicroelectronics signed a definitive deal to buy NXP's automotive-grade

MEMS-sensor unit for up to \$950 million in cash, strengthening its safety-sensor portfolio for ADAS and autonomous platforms.

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4. Lyft to Add Autonomous Shuttles to its Ride-hailing Network

Lyft announced a partnership with Benteler Mobility (via Holon) to integrate U.S.-made autonomous shuttles into its ride-hailing network starting in late 2026, with testing to begin in 2026—part of its broader strategy to scale physical-AI vehicle deployments.

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Energy Transition

1. Fortum Buys 4.4 GW Finnish On-shore Wind Pipeline from ABO Energy for up to €70 Million

Utility Fortum agreed to acquire ABO Energy's entire early-stage Finnish wind portfolio

paying €40 million up-front plus €30 million in milestone earn-outs—to bulk up its Nor renewables backlog.

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2. KGAL Buys 60.5 MW Spanish Solar Portfolio from BayWa r.e. as Part of €175 Million Green-Power Mandate

The German asset manager's Infrastructure Fonds 6 completed its first transaction for Software AG Foundation, acquiring construction-ready PV projects in Castilla-La Mancha and Murcia with COD slated for 2026.

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3. Nautilus Solar Secures \$275 million Tax-Equity Partnership with Greenprint Capital for 130 MW Community-Solar Fleet

The structure—one of the biggest community-solar tax-equity deals to date—will fund 230 projects spanning five U.S. states under a \$2.5 billion joint-venture platform.

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4. Hitachi Energy and E.ON Sign Transformer-Supply Framework Worth up to \$7 Billion for German Grid Upgrades

The multi-year agreement covers high-voltage power transformers integral to Germany's north-south transmission corridors, underscoring accelerating grid-hardware investment to integrate renewables.

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5. Constellation Energy wins FERC approval for \$16.4 Billion Calpine takeover

The cash-and-stock acquisition creates North America's biggest competitive generation fleet at nearly 60 GW.

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Physical AI

1. Doosan Robotics Acquires ONExia for \$25.9 Million

Korea's leading collaborative robotics manufacturer announced the acquisition of Pennsylvania-based ONExia for \$25.9 million, securing an 89.59% stake in the US automation firm to accelerate its transition from hardware-centric operations to AI-driven intelligent robotics.

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2. Cheetah Mobile to Acquire Controlling Stake in UFACTORY for \$99.5 Million

Chinese IT company Cheetah Mobile signed a definitive agreement to acquire a 60.8% equity interest in Shenzhen UFACTORY Technology Co., Ltd., a leading provider of lightweight robotic arms, for approximately RMB 99.5 million (\$14.2 million USD).

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3. Bonsai Robotics Acquires farm-ng

San Jose-based Bonsai Robotics acquired Watsonville-based farm-ng for an undisclosed sum, combining Bonsai's AI software expertise with farm-ng's hardware capabilities to create comprehensive agricultural robotics solutions.

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4. EngineAI Raises \$139 Million Series A

Chinese robotics startup EngineAI raised approximately 1 billion yuan (\$139 million) across two tranches of Series A funding to advance general-purpose humanoid robot development, with investors including Rocket Capital, XPeng, [JD.com](#), CATL Capital, and others.

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5. Rune Technologies Raises \$24 Million Series A

Arlington-based defense tech startup Rune Technologies raised \$24 million in Series A funding led by Human Capital to modernize military logistics with its AI-enabled predictive logistics platform TyrOS.

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6. Asylon Raises \$26 Million Series B for Robotic Security Services

Philadelphia-based robotics company Asylon secured \$26 million in Series B funding led by Insight Partners to expand its robotic security-as-a-service business, including autonomous drones and modified Boston Dynamics robot dogs for security applications.

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7. Swift Navigation Raises \$50 Million to Bring Centimeter-level Positioning to Robotics

Swift Navigation, a developer of centimeter-level positioning technology for vehicle autonomy, robotics, and precision logistics, this week said it has raised \$50 million in a Series E financing round. This round brings the company's total funding to date to \$250 million.

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