

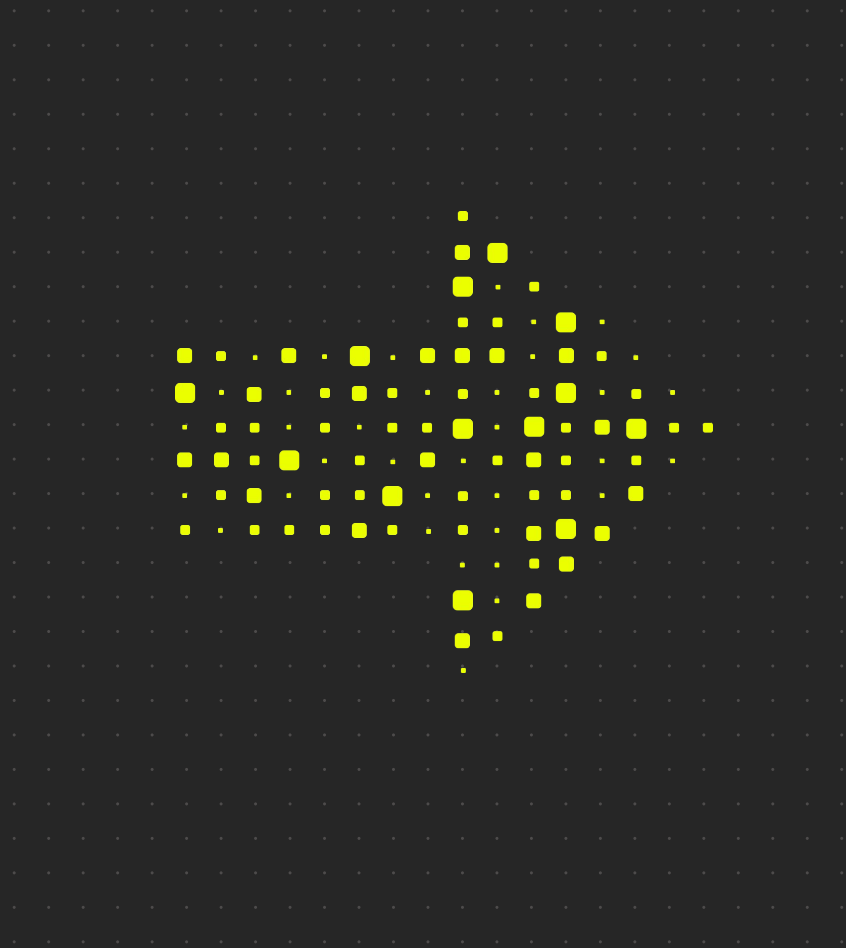
LUZmo

Roadmap
2026-Q3



Luzmo

What we shipped



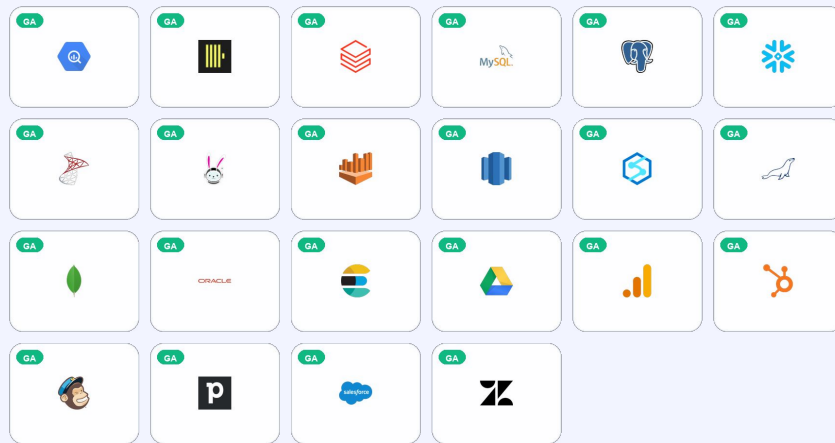
Nested Aggregations

General Availability Release

Build multi-level metrics in a single formula no pre-aggregation needed.

- Available for all connectors
- Lifting all beta limitations

Included by default in Professional plans and higher



AI Context

Teach AI your business logic.

- Business rules written in plain language, right on your datasets, columns & dashboards.
- Custom prompt in your embed token: Write each customer's rules once, and every answer follows them
- Safe & in your control: Empty means no change; authored per object, scoped per tenant.

Examples: "Revenue is net of refunds, excludes VAT." ·
"Use contract start date for trends." · "Exclude test accounts."

AI context

Shared across all languages

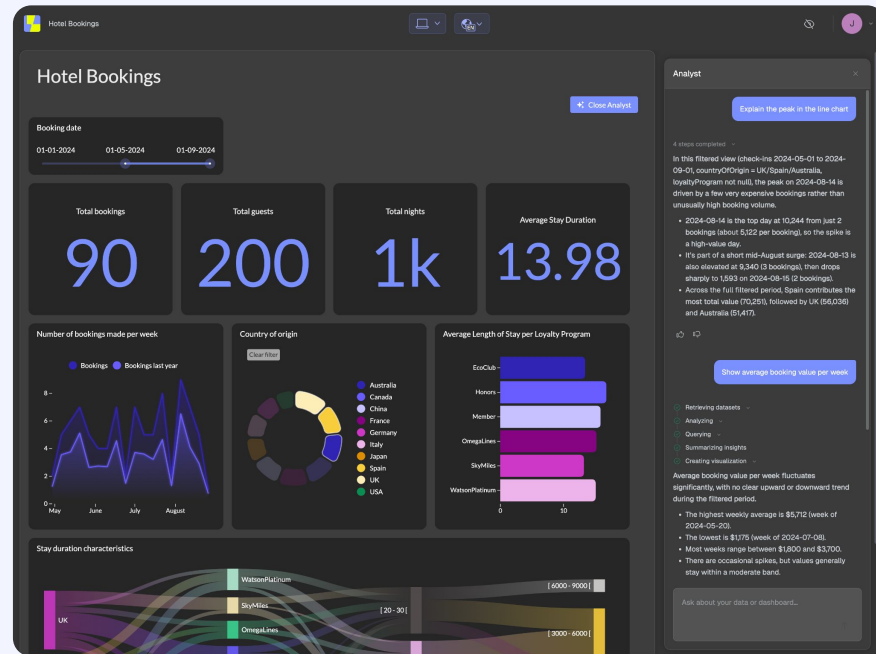
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Add markdown context for this dataset to improve AI accuracy

Luzmo IQ x Dashboards

Luzmo IQ now understands the dashboards your users are looking at.

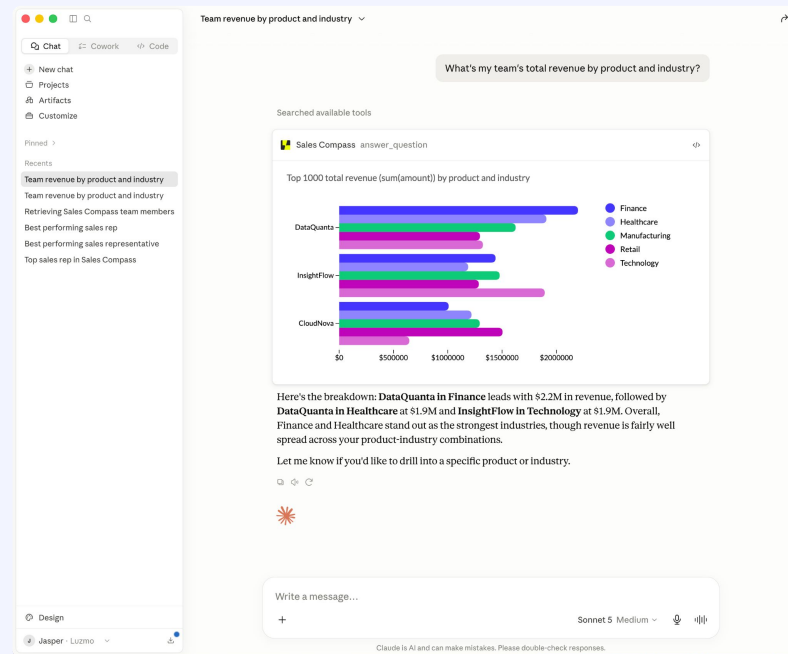
Ask questions about specific charts or data shown in the dashboard, taking into account any applied filters and dashboard context, while being able to query the underlying dataset for deep analysis.



Embedded MCP App Server

Include Luzmo IQ as a sub-agent into your own Agent or MCP server to give it data analysis super powers.

Luzmo's MCP App is purposely built for embedded applications inside another agent or MCP server. It provides various options to authenticate your user and includes chart generation for clients that already work with MCP Apps.



Other Q2 Releases

Smarter Luzmo IQ conversation history

Longer threads and follow-ups stay coherent; instructions and custom prompts applied more reliably.

New Luzmo Agent API

A single endpoint that drives all Luzmo agents, with streaming, stored conversation history and easy access to AI-generated assets.

Scheduled chart exports by email

Embedded users can schedule recurring PNG/PDF/CSV exports of a single chart from within the embedded dashboard.

Improved Luzmo IQ progress steps

Full transparency into how IQ reached its answer: it shows which datasets and columns it used and how it queried them, in plain language. No black box.

Luzmo Agent Skills

Turns Cursor, Claude Code, and Codex into Luzmo embedding experts (10 skills, 4 subagents).

Multi-query Custom Charts

Build more powerful charts by combining data shapes a single query can't express.

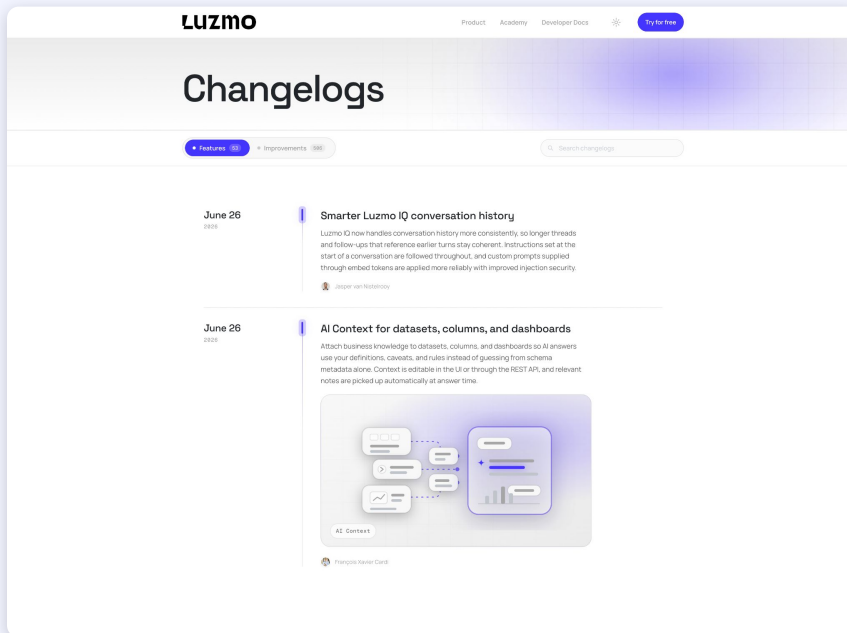
Copy charts to other dashboards

Reuse any chart on another dashboard without needing to rebuild it.

New Changelogs page

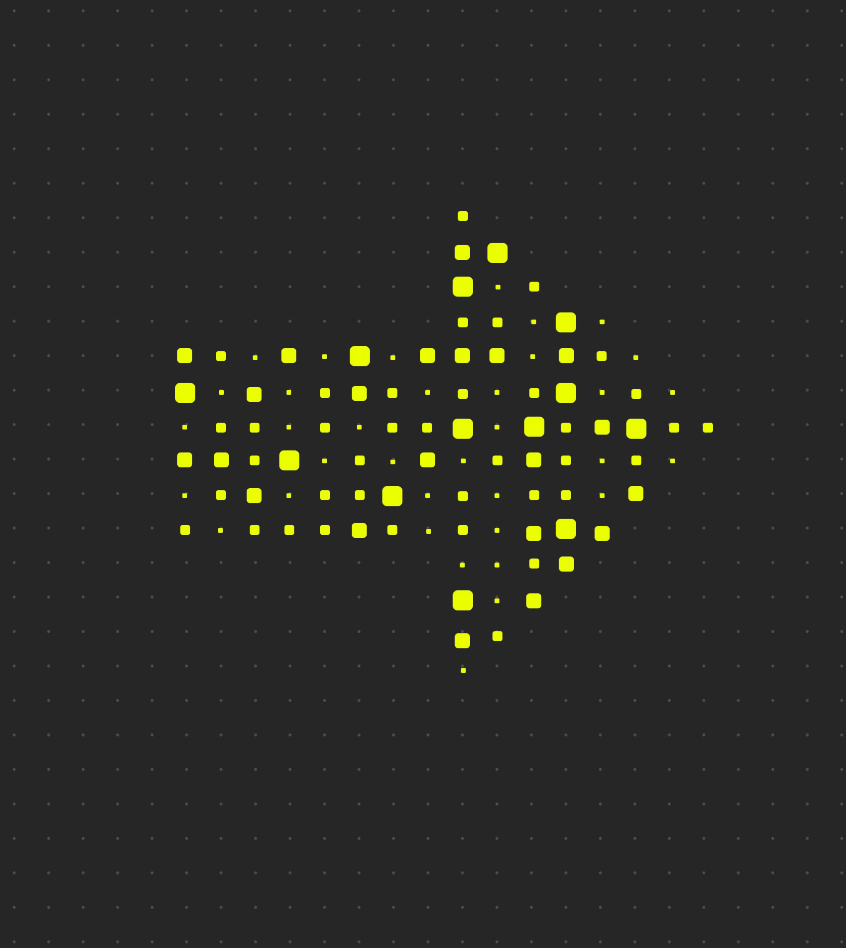
- **Features and Improvements in one feed:** browse major releases or drill into the weekly stream of smaller fixes.
- **Live and public:** updated continuously as we ship, so you always see what's new.

→ <https://changelogs.luzmo.com/>



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Coming in Q3



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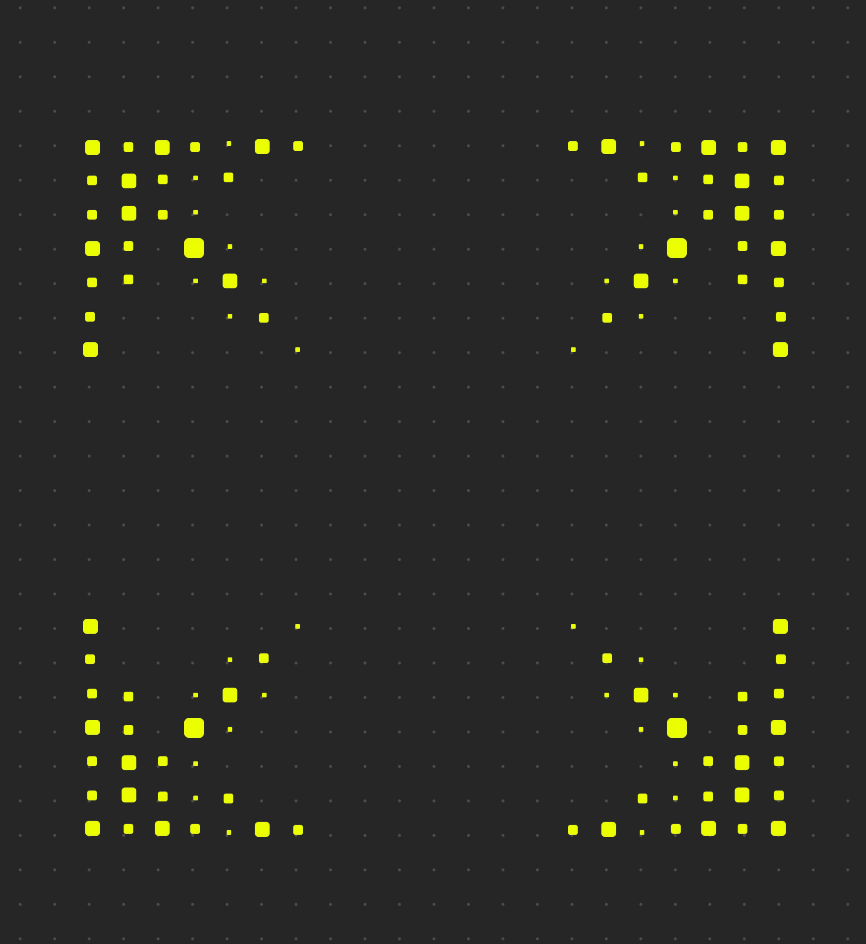
Data analysis is shifting out of their
source apps

Over 50% of organizations use AI
tools for automated insights and
natural-language query

- Gartner

60% of ChatGPT users cite data
analysis as top use case

- OpenAI





What's the team's total revenue by product and industry?

Searched available tools

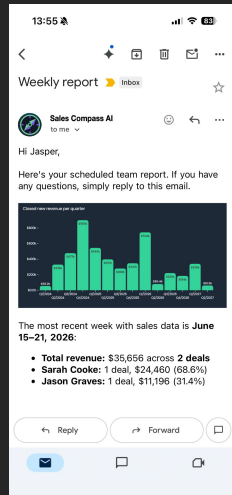
Sales Compares overview, question

Save to dashboard

Closest new revenue per quarter

Quarter	Revenue (\$M)
Q1 2019	~1.5
Q2 2019	~1.8
Q3 2019	~2.2
Q4 2019	~2.5
Q1 2020	~2.8
Q2 2020	~3.2
Q3 2020	~3.5
Q4 2020	~2.8
Q1 2021	~2.5
Q2 2021	~2.2
Q3 2021	~2.8

Here's the breakdown: DataQuanta is Finance leader with \$3.2M in revenue, followed by DataQuanta in Healthcare at \$1.9M and InsightFlow in Technology at \$1.9M. Overall, Finance and Healthcare stand out as the strongest industries, though revenue is fairly well spread across its product industry contributions. Let me know if you'd like to drill into a specific product and industry.



LUZmo

Our focus



Agent-ready data

Add business logic and semantic context, add formulas, accelerate queries, and create datasets variants.



Luzmo Agent

A dedicated agent for **embedded** data analysis and visualizations.



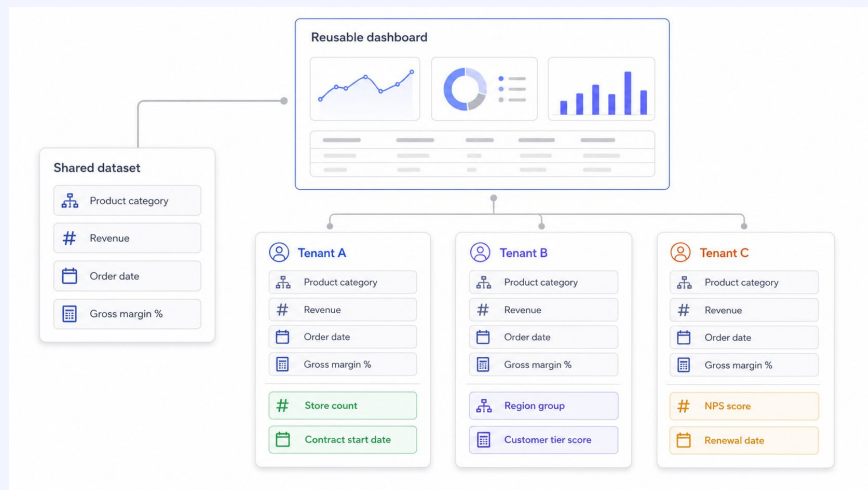
Works everywhere

Live charts, dashboards, filters, alerts, exports, that work anywhere and travel across surfaces.

Custom fields

Customer-specific fields, without customer-specific datasets

- Unlock key embedded use cases where end users need their own derived columns, formulas, or source-specific custom fields without impacting other tenants.
- One shared dataset model, extended with tenant-specific fields.
- No more dataset/dashboard duplication for customer-specific reporting.



Dashboard agent

A new Agent panel in Luzmo Studio: build, edit, and ask, all in one place.

- **Build dashboards by describing them**

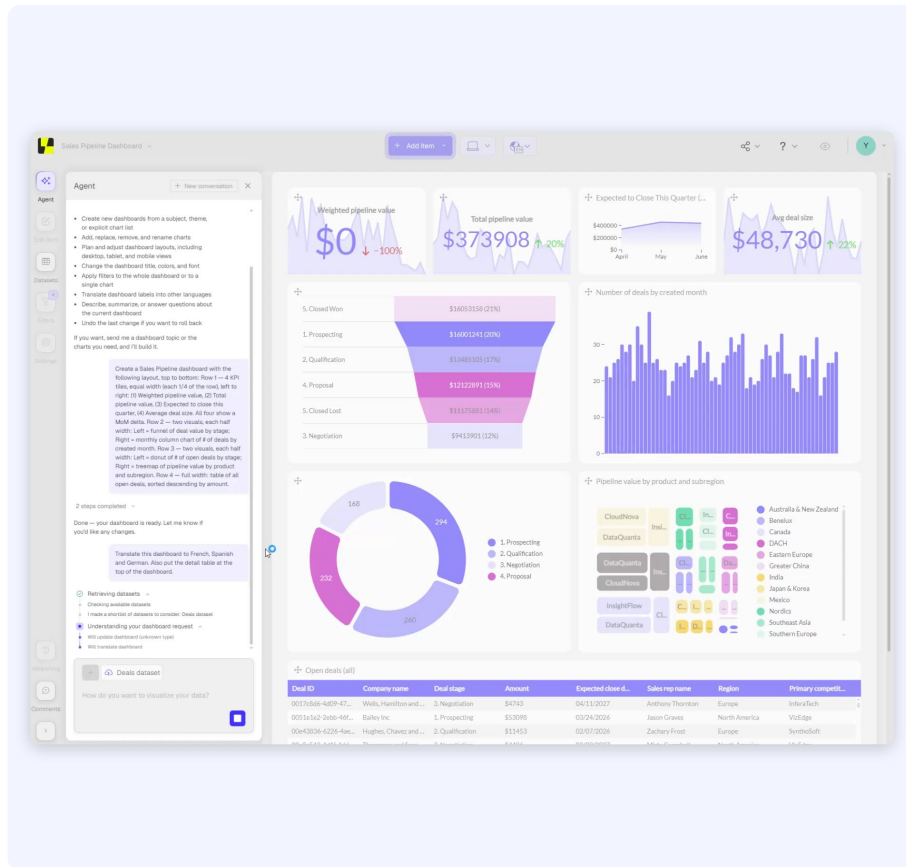
Ask in plain language and the agent assembles the charts, layout, and theme for you – no manual dragging required.

- **Edit and refine through conversation**

Add a chart, restyle the layout, or even translate the full dashboard by just saying what you want, iteratively.

- **Ask about the active dashboard.**

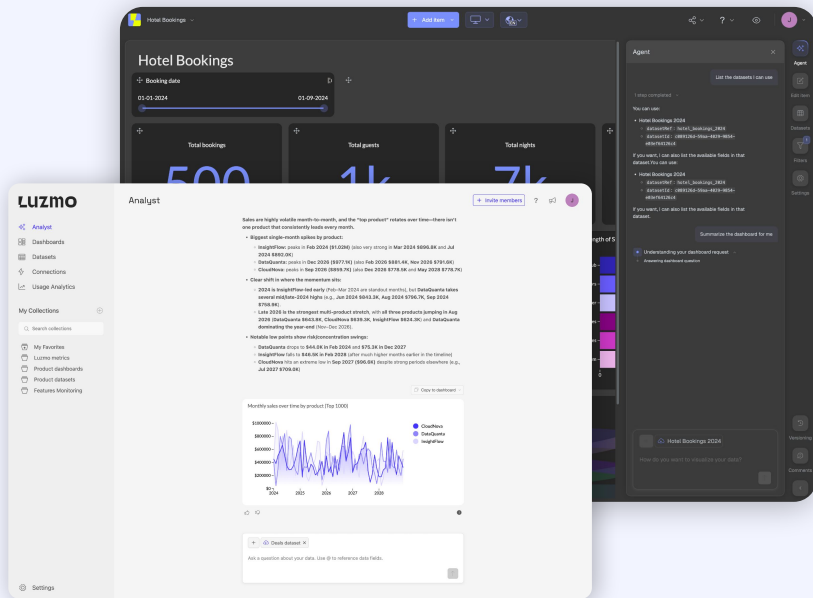
Get instant summaries, key insights, and answers about your data and the current dashboard.



Universal Luzmo Agent

All Luzmo agents bundled into a single experience.

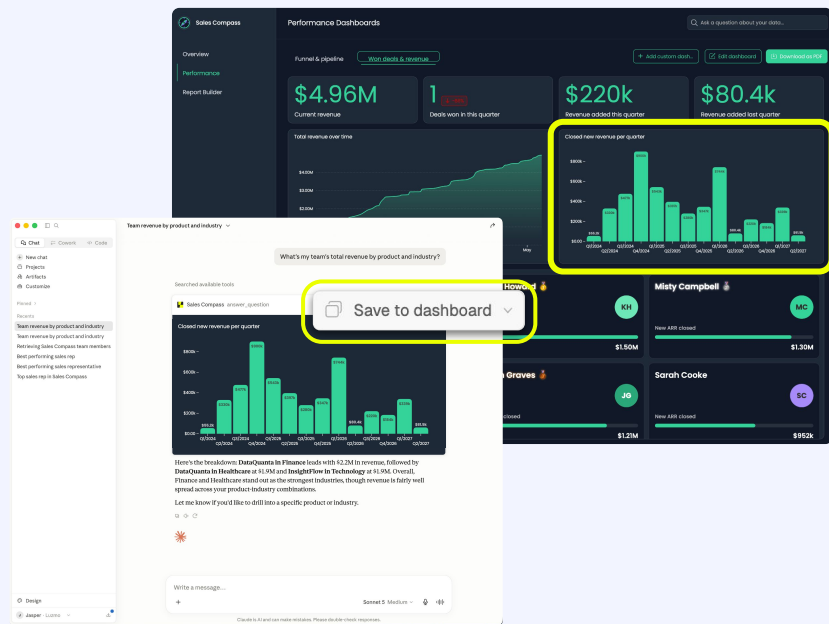
- One Luzmo agent powering all in-app, MCP and embedded conversations: Ask data questions, create dashboards, summarize data, create formulas, improve metadata context, etc.
- Use the Luzmo Agent through the Luzmo App, MCP, or embed with full control over its capabilities.



Move charts across surfaces

Go beyond one-off data answers and charts, by allowing users to explore the results and reuse them anywhere.

- Save charts generated by third party tools (e.g. Claude, ChatGPT) to in-app dashboards.
- Export charts or the underlying data directly in chat.
- Schedule alerts and exports from any surface.



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Q & A

Submit ideas via our Roadmap page:
<https://www.luzmo.com/roadmap>

