

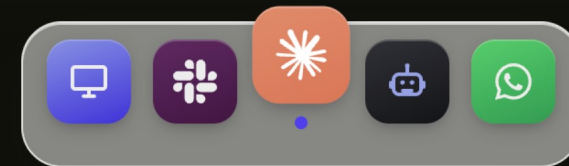
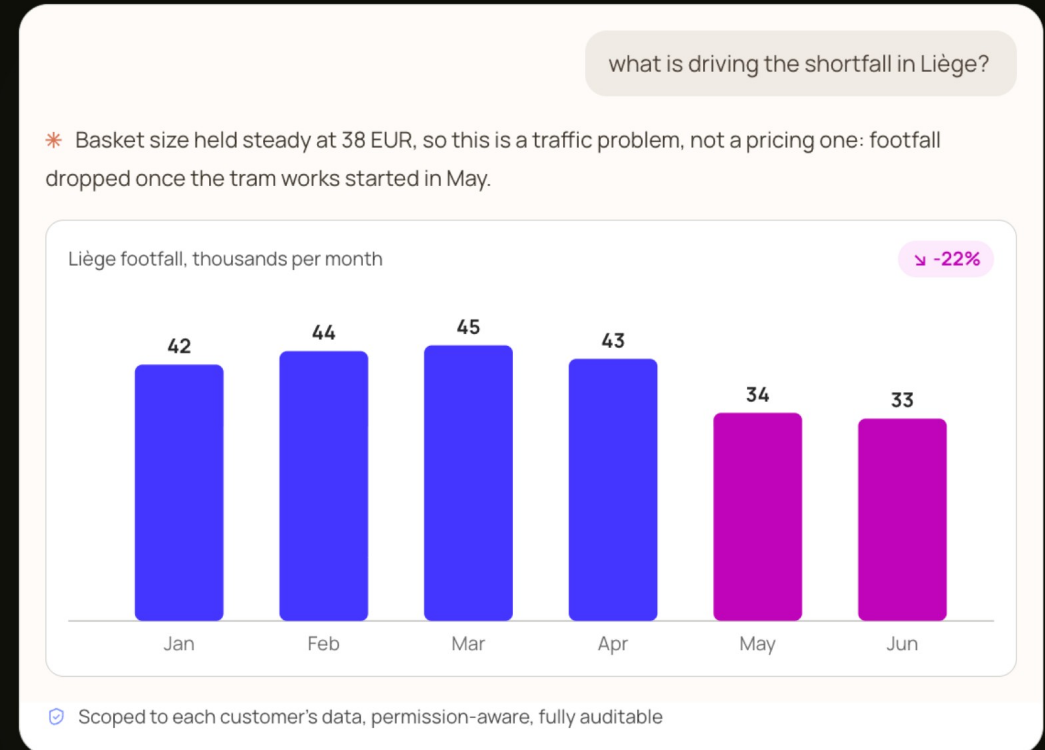
luzmo

Roadmap

2026-Q4

What we shipped in Q3, and what is coming in Q4.

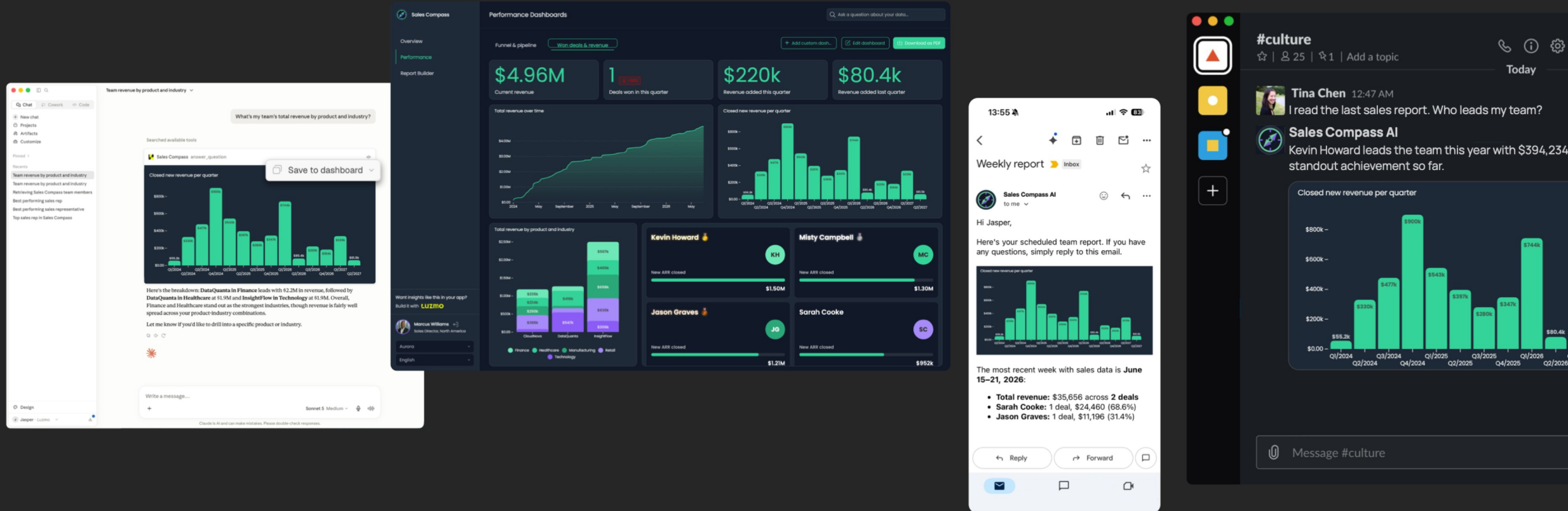
Customer-facing analytics in your app, Claude, Slack, WhatsApp, or any other surface



Luzmo

Embedded AI analytics, wherever your customers work

In your product, Claude, Slack or their inbox. Agents grounded in your business knowledge give consistent, governed answers and reports.

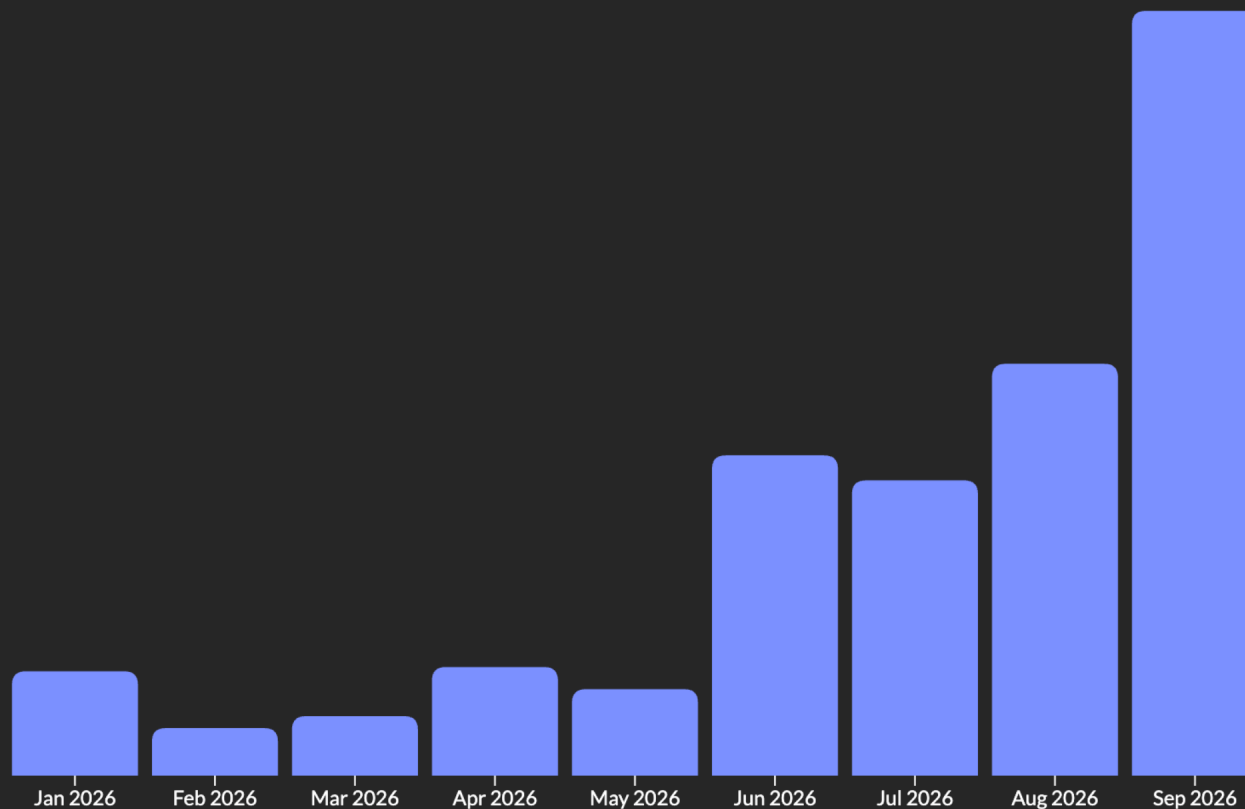


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4x

more agent conversations
through Luzmo in Q3

Monthly agent conversations, January to
September 2026





Our focus



Agent-ready data

Add business knowledge, semantic context, and formulas. Accelerate queries and create tenant datasets.



Luzmo Agent

A dedicated agent for **embedded** data analysis. Generate visualizations and reports that work in any app, MCP, or AI tool.

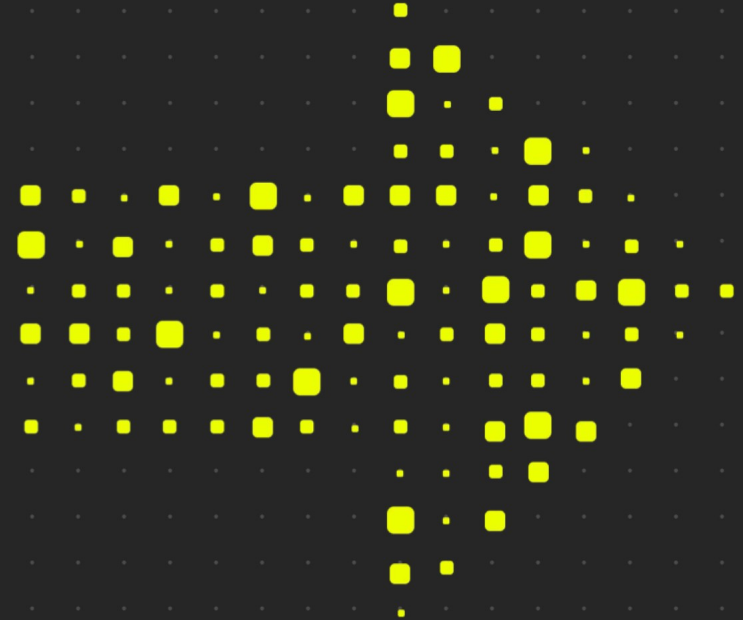


Governance

Monitor the agents used by your customers, review generated answers and reports, and adjust agent behavior where needed.

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What we shipped



Knowledge Layer

Teach the AI your business once: your definitions, terminology and rules.



Rules

Instructions every linked Agent follows.



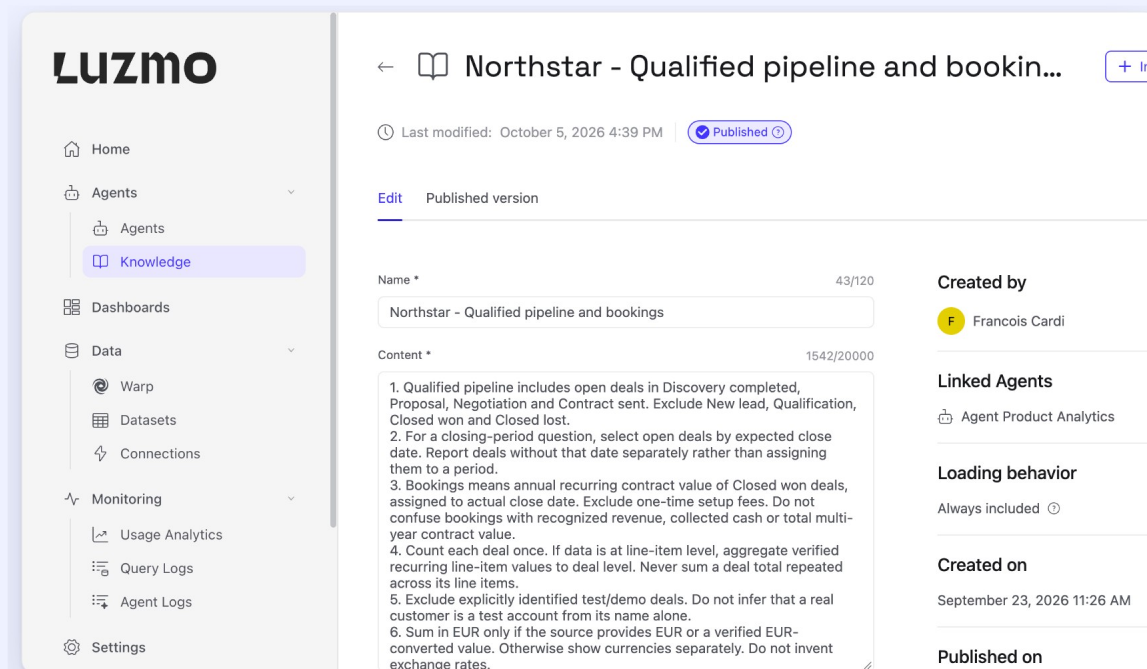
AI Context on your data

Tell the AI what your data means.



One place to manage it

Owners edit, everyone can view.



Agents: tailored to your users and business



Build and test in Luzmo

Define the knowledge, datasets and AI capabilities it uses.



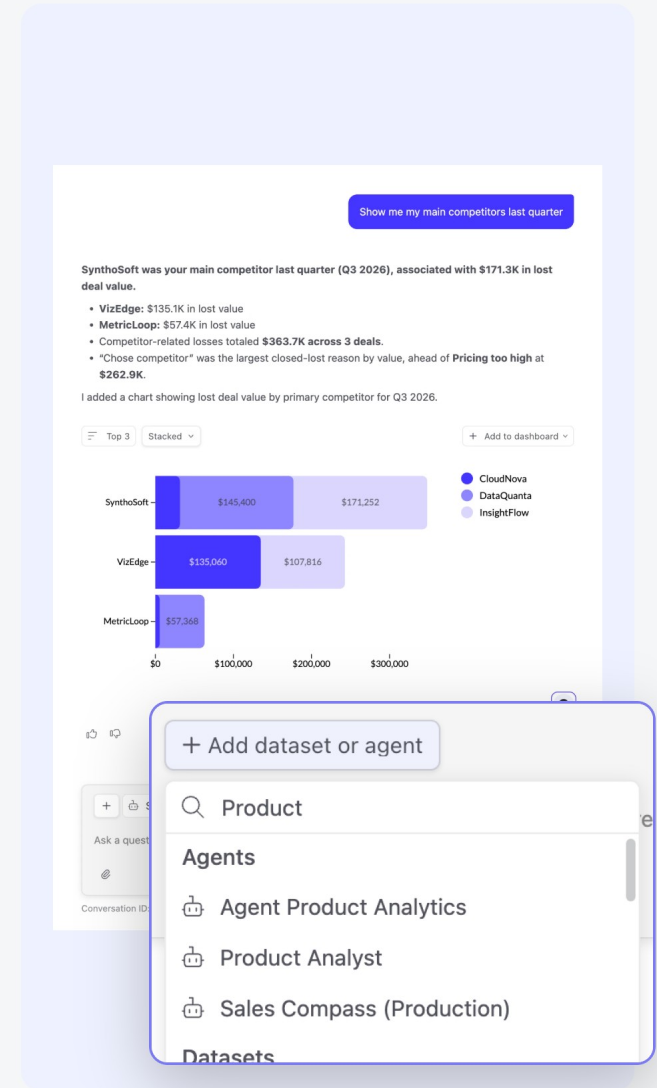
Embed anywhere

Via MCP, the chat component, or the API, with one agent ID.



Update without code change

Fast iterative updates you fully control.



Dashboard Agent

Build, edit and ask in one Agent panel in Studio.



Describe it, get a dashboard

Charts, layout and theme from a single prompt.



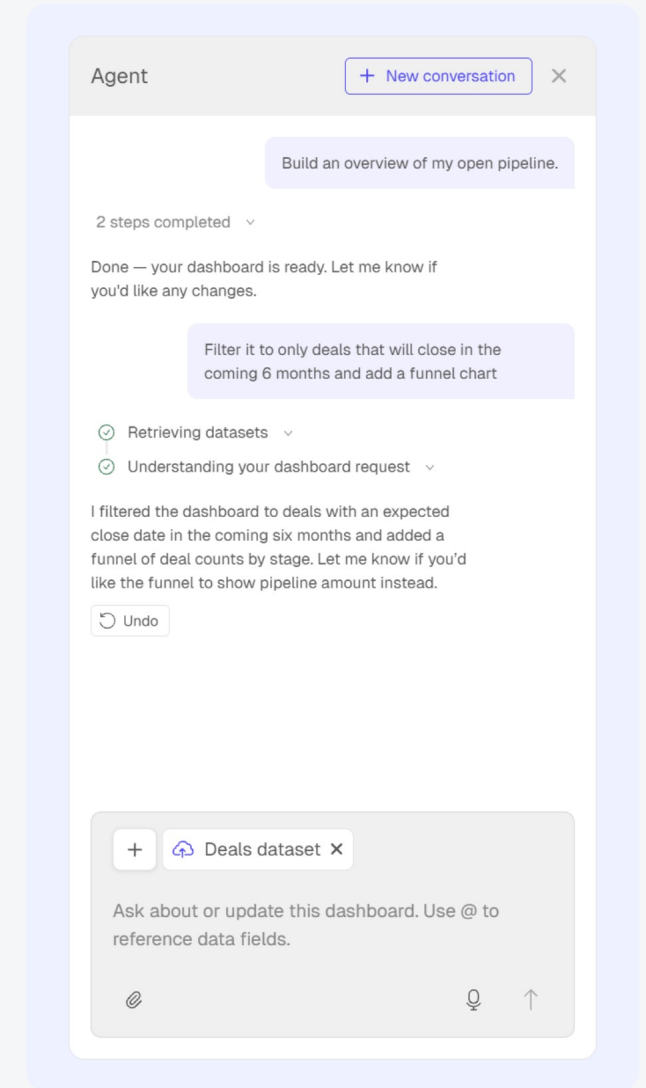
Refine by chatting

Add charts, restyle, or translate the whole dashboard.



Ask about the dashboard

Get summaries and insights on what's on screen.



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.

FROM

**Duplicating datasets and dashboards
for customer-specific reporting**



TO

**One shared dataset model, extended
with tenant-specific fields**

Works whether your customers share one data source or each have their own. Fix a shared calculation once and every customer gets it. Set up through the API.

One dataset, shared fields and tenant fields

Every field is either shared with all your customers, or scoped to the customers it belongs to.

Opportunities dataset

Reference, Amount, Status	Columns	Shared
Win rate	Formula	Shared
Customer tier	Own source	Customer A
Contract value	Derived column	Customer A
Region, Lead source	Own source	Customer B



Each customer sees its own

Shared fields plus its own fields. Nobody sees another customer's fields.



Any kind of field

A derived column or formula, an existing column, or an extra column in a customer's own source.



Fix it once

Improve a shared formula and every customer gets it right away.

WHAT ELSE WE SHIPPED

Other Q3 releases

More power in data, custom charts and the Luzmo MCP



Array column filter expressions

Filter array columns: includes all, any, only, and more.



Luzmo MCP: 12 new tools

Manage datasets, formulas and AI context from any AI tool.



Configurable custom chart options

Editors tweak custom charts in Studio, no code.



Custom Charts in AI agents

Agents use your own Custom Charts in their answers.



Switch chart type

Change a chart's type without rebuilding it.



SQL schema browser

Write SQL with a live schema and smart autocomplete.

WHAT ELSE WE SHIPPED

More releases

Faster embeds, smarter formulas and more control



Faster embeds

~22% faster, with web components as the new default.



Linked datasets in formulas

Use columns from linked datasets in formulas.



Agent Logs and improved Query Logs

See what users ask agents and which context was used.



Table exports via webhook

Deliver large exports straight into your own app.



Expanded Admin role

Admins see all alerts, tasks, exports and AI chats.



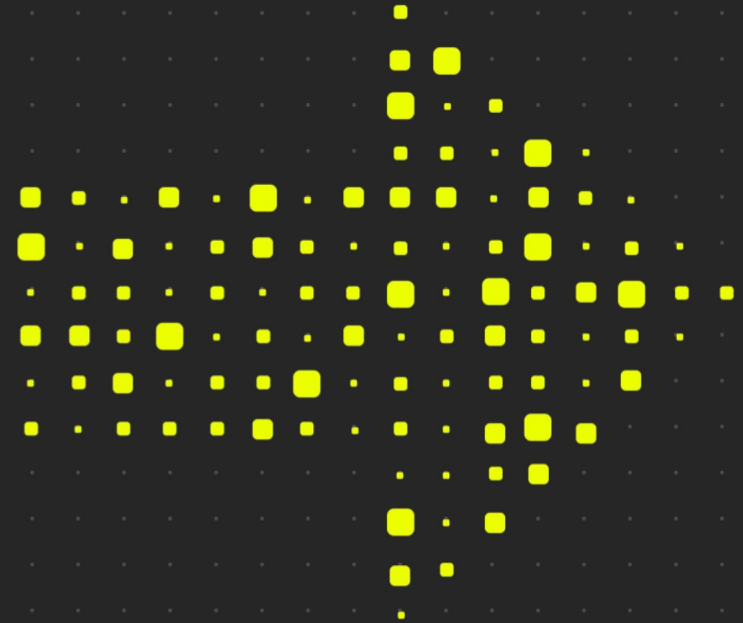
Warp dashboard

Monitor all Warp syncs and fix failures yourself.

Full details and demo videos in our October release post: luzmo.com/blog/product-release-update-october-2026

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Coming in Q4



COMING IN Q4 Q4 2026

Simplified embedded dashboard creation

Template dashboards your users make their own, by click or by asking, in one component.



Start from a template

Users tweak a template and save their own.



Click or ask

Every action works in the UI and the agent.



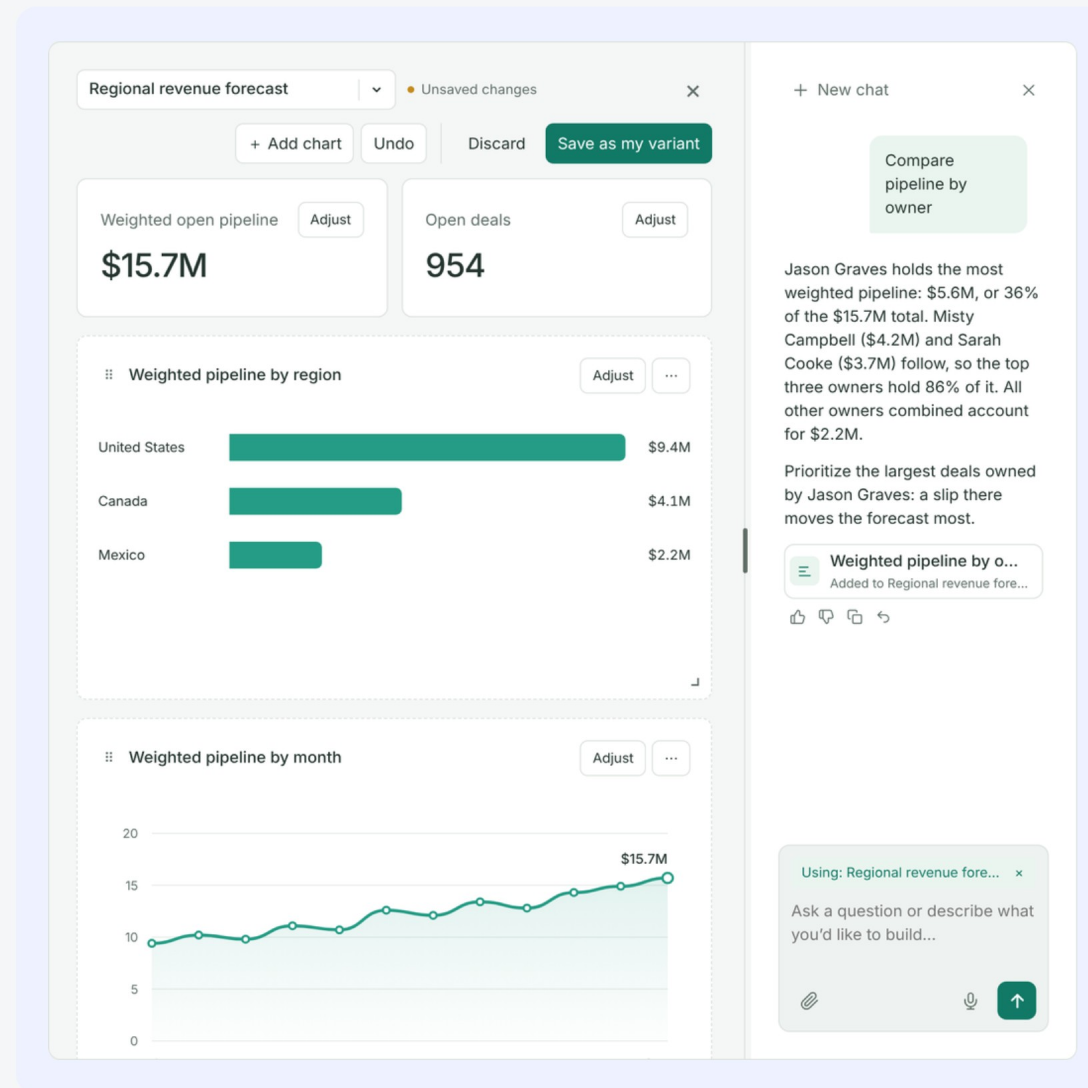
Explore beyond the dashboard

Ask open questions, add answers to dashboards.



Live in a few lines of code

One ready-made component.



Verified answers

Approve the answer to a key question once. Agents reuse it for the same and similar questions.



Same answer, every time

Agents run the approved method on each customer's own data.



Verified in two clicks

Verify from the chat; Luzmo flags what changed.



See what answers are based on

See which verified answer each reply used.

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Home

Agents

Knowledge

- Rules
- Verified answers

Dashboards

Data

Monitoring

Knowledge > Verified answers

Verified answers Billing assistant

Rules Verified answers

ACTIVE
2

QUESTIONS ANSWERED WITH A
VERIFIED ANSWER
34%
22% reused · 12% followed · 30 days

NEEDS REVIEW
1

✓ What was revenue last quarter by country?
Verified by Anna · 2 Oct 2026 · Active Same and similar questions

f Invoiced revenue

by CountryLast completed quarterBy invoice dateBar chart

Reused 41Followed 23👉 after 0

✓ 18 related questions checked, changes reviewed

Question	Status	Used for	Reused / followed
How many active subscriptions do we have by plan? Verified by Anna · 12 Sep 2026	Active	Same and similar	112 / 30
What is our monthly churn rate? Formula "Churn rate" changed on 28 Sep	Needs review	—	—

Proactive insights: from what changed to what to do next

Agents flag what changed, explain why, and suggest what to do next.



Alerts that explain themselves

Every alert comes with the reason behind it.



You decide what matters

Pick the metrics to watch and when to alert.



Recommend the next step

Define the actions agents suggest to users.



Delivery Ops agent · just now

**On-time delivery fell to 91%,
below the 95% SLA**



Why: 80% of late orders ship with Carrier B,
whose volume rose 30%.

Check Carrier B

Reroute volume

New KPI widget with period comparison

Show a KPI and its change versus the previous period in one widget, driven by your date filters.



Built-in period comparison

See how your KPI changed versus a previous period, as an absolute or % change, with automatic period-to-date for incomplete periods.



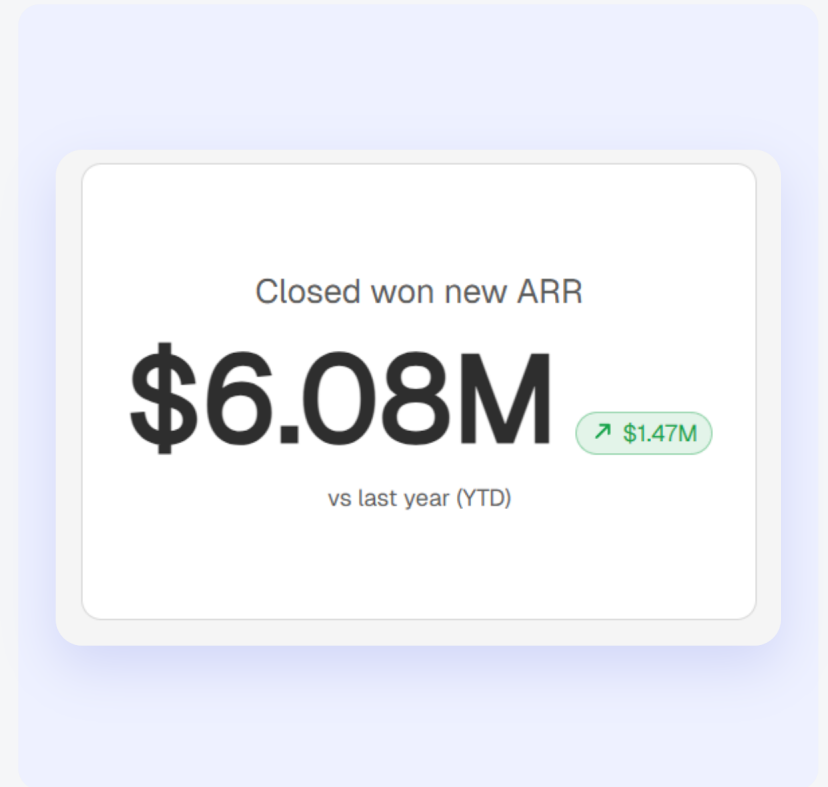
Follows your date filters

Compare against a fixed period, or a variable period based on active date filters in the dashboard.



Clear to every viewer

An automatic label names the compared period, like "vs previous month (MTD)".





Take the Everywhere Index 2026 survey

Our survey of product teams that ship analytics. Answer it, and get your own benchmark score. Open until October 16.

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**Your customers want
to bring their own AI.**

Each dot is 1% of product teams.



6 minutes.
Your own benchmark score.

→ Take the survey

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**Has your AI ever given a
customer a wrong
answer?**

Yes

Not sure

No

6 minutes.
Your own benchmark score.

→ Take the survey



Scan, or go to
tally.so/r/pb2DXE



The Everywhere Roadshow

Hear the first Everywhere Index results in person, with fellow product leaders and our co-founders.

New York

Tue, October 20

Brussels

Thu, October 22

Paris

Date coming soon

London

Date coming soon

Amsterdam

Date coming soon

Online finale

Tue, November 17 · full results

Free to attend, spots are limited. Pick your city:

luzmo.com/events/everywhere-roadshow

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Q & A

Read the October release post:

luzmo.com/blog/product-release-update-october-2026

Submit ideas via our Roadmap page:

luzmo.com/roadmap

