

# EDR vendor landscape

59 vendors · 80 tools  
vs prior 6mo (May-Nov 2025)

Endpoint Detection and Response · Nov 10 2025 to May 10 2026 · 6-month trend

## EXECUTIVE SUMMARY

<p>Funding rounds</p> <p><b>6</b></p> <p>▼ 57% vs 14 prior</p>	<p>Disclosed capital</p> <p><b>\$241M</b></p> <p>▼ 7% vs \$259M prior</p>	<p>M&amp;A deals</p> <p><b>4</b></p> <p>flat (4 prior)</p>	<p>Avg deal size</p> <p><b>\$48M</b></p> <p>▲ 2.6x vs \$18M prior</p>
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### HEADLINE READ

EDR is consolidating, not growing. Round count fell 57% half-over-half (14 to 6) while average check size jumped to \$48M, meaning capital is concentrating in fewer, bigger bets (Exein \$109M, Axiado \$100M). Palo Alto's acquisition of Koi for the agentic endpoint and LevelBlue absorbing Cybereason mark a shift from greenfield funding to platform consolidation.

## FUNDING ACTIVITY (LAST 6 MONTHS)

COMPANY	STAGE	AMOUNT	LEAD INVESTOR	DATE
Exein	Venture	\$109.0M	Blue Cloud Ventures	Dec 18, 2025
Axiado Corporation	Series C+	\$100.0M	Maverick Silicon	Dec 2, 2025
Bold Security	Series A	\$28.0M	Bessemer, Red Dot	Mar 12, 2026
Soverli	Pre-Seed	\$2.6M	Founderful	Dec 15, 2025
XFA	Seed	\$1.8M	ScaleFund, Curiosity VC	Dec 12, 2025
Swif	Venture	undisclosed	Z Venture Capital	Feb 9, 2026

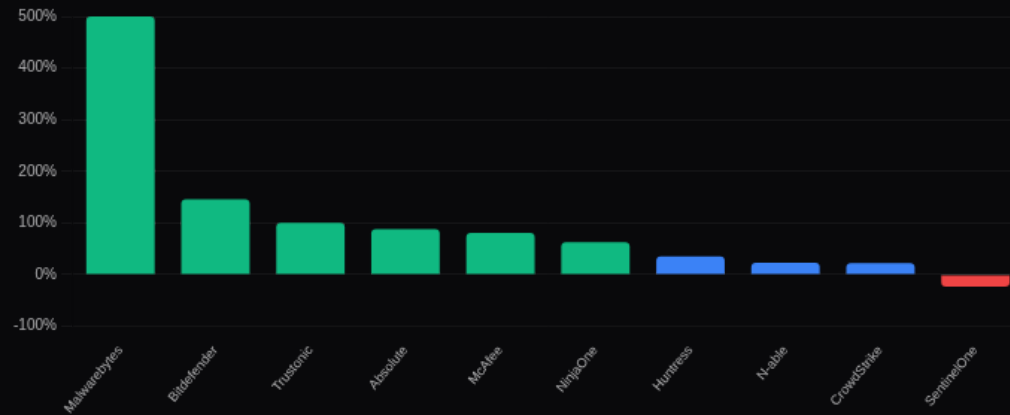
Source: CybersecTools MCP. Filtered to Endpoint Security parent category as EDR-tagged rounds inherit parent classification.

### TOP VENDORS BY TOTAL FUNDING RAISED (ALL-TIME)

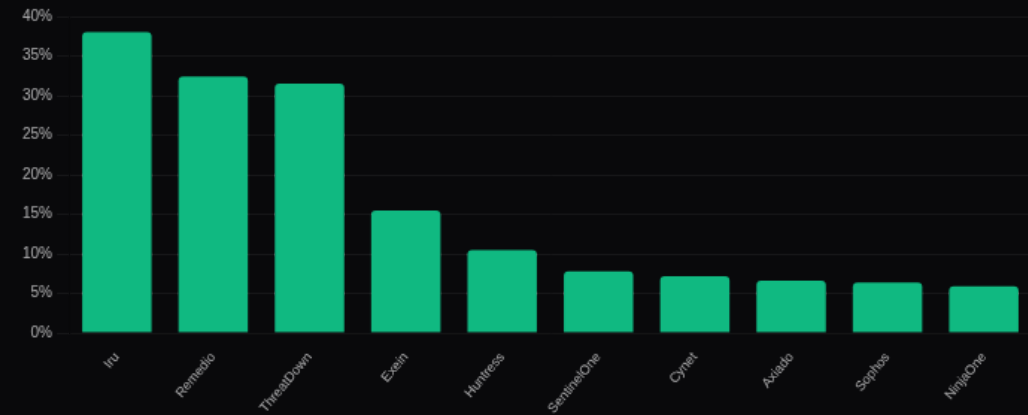


Red bar: acquired/distressed. Gray bar: parent-company rolup or PE-owned legacy, Green: independent venture-backed.

### HIRING MOMENTUM (Q/Q JOB GROWTH %)



### HEADCOUNT GROWTH (Q/Q %)



## M&A ACTIVITY

TARGET	ACQUIRER	STRATEGIC ANGLE	DATE
Koi	Palo Alto Networks	Agentic endpoint security	Apr 14, 2026
Cyber Advisors	Sterling Investment Partners	PE roll-up of MSP/MSSP	Mar 19, 2026
Jamf	Francisco Partners	PE take-private, Apple endpoint	Jan 31, 2026
Cybereason	LevelBlue	Distressed EDR absorbed into MSSP	Nov 25, 2025

**Read:** Two of four deals are PE take-privates (Jamf, Cyber Advisors), one is a strategic platform tuck-in (Koi to Palo Alto), and one is a distressed exit (Cybereason to LevelBlue at a fraction of its \$933M raise). Standalone EDR as a venture category is past peak; the next dollar in is more likely to be an acquirer's than a Series B lead's.

## MARKET HEALTH SCORE

Funding momentum

**Cooling**

14 to 6 rounds

Hiring signal (top tier)

**Expanding**

CrowdStrike, NinjaOne, Huntress

Consolidation pressure

**High**

PE + strategic acquirers active

Innovation pipeline

**Narrowing**

Bets shifting to firmware + agentic

### What the data is saying

The EDR category is bifurcating. At the top, CrowdStrike (78 momentum, +13% YoY headcount, 801 open jobs), NinjaOne (71 momentum, +50% YoY headcount), and Huntress (70 momentum, +49% YoY headcount) are widening their moat through hiring. In the middle, second-tier vendors are being absorbed: Cybereason raised \$933M lifetime, then exited to LevelBlue (an MSSP) after losing 19% of headcount in the past year. At the bottom, new entrants are pivoting away from pure EDR toward adjacent surfaces, firmware-level (Axiado \$100M, Exein \$109M) and agentic endpoint (Koi acquired by Palo Alto). The remaining venture money in the category is funding what comes after EDR, not more EDR.

## GEOGRAPHIC AND MATURITY CONTEXT (ALL-TIME)

Geographic concentration (24 EDR-pure companies)

United States	13 (54%)
France	2
New Zealand	2
Romania, India, Korea, Italy, Germany, Luxembourg, El Salvador	1 each

Funding skew (subcategory)

Total venture raised	\$4.04B
Median company funding	\$22.7M
Trimmed avg (excl. outliers)	\$128.6M
<b>P75 funding</b>	<b>\$235M</b>

Median is \$22.7M, top quartile starts at \$235M; the gap shows a winner-take-most market.

Data freshness: pulled live from CybersecTools MCP on May 10, 2026. Funding data filtered to Endpoint Security parent category since EDR rounds inherit parent classification in source data. Prior-period delta uses May 10 to Nov 9, 2025.