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ProductBeacon – State of Cyber Security Markets 2026, Front 3: The Data Posture Front

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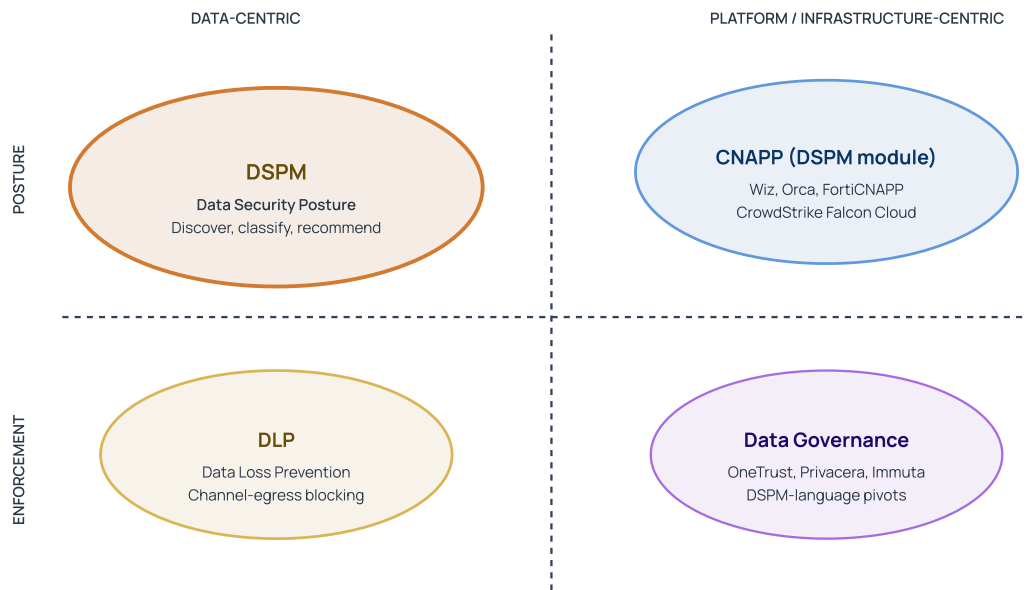
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3.1 The Playing Ground

Data Security Posture Management (DSPM) is the discipline of finding sensitive data wherever it lives across cloud, SaaS, on-prem, and AI-training surfaces; classifying it; mapping who and what can reach it; and recommending or executing posture changes to close exposure gaps. The buyer noun is *data at rest* – what exists, where it sits, who can touch it, and how exposed it is – not data flows (DLP) or people (IRM) ^{1 2}. The architectural anchor is a discovery-and-classification engine paired with an access-and-permissions graph, wired into the data estates the buyer cares about: object storage, managed databases, data warehouses and lakehouses, SaaS data tenants, AI training corpora, and (increasingly) the vector stores and embedding indexes feeding production LLM and agent workflows. The 2026 product narrative has shifted from regex-and-fingerprint classification toward AI-classifier substrates, and from cloud-storage-only coverage toward a multi-estate scope that explicitly includes AI training pipelines and unstructured SaaS data ^{3 4}.

Where the categories overlap. DSPM shares substrate with DLP on data classification, with IRM on access-pattern visibility, and with CNAPP on cloud asset discovery. Per the report's taxonomy ⁵, DSPM owns the *discovery* primitive – finding data, classifying it at rest, mapping access paths – while DLP owns the *enforcement* primitive (stopping egress) and IRM owns the *people* primitive (who is doing what, and why). The category test is which question a vendor's product actually answers: DSPM answers *what data exists and who can reach it*; DLP answers *what data is moving where, and should we stop it*; IRM answers *who is doing what, and why*; CNAPP answers *what is the security posture of this cloud workload*. When a vendor's hero page claims more than one, the practical test is which question their discovery scope, classification engine, and remediation defaults are actually built around.

Where DSPM Sits in the 2026 Cyber Stack



*DSPM's category boundary is contested from all three neighbors – CNAPP pulls right (bundling), DLP pulls down (convergence), Governance pulls diagonally (rebranding).
Author's read of public material, May 2026. Boundaries are conceptual, not data-derived.*

Where DSPM Sits in the Cyber Stack – DSPM, DLP, IRM, CNAPP, and AI Security positioned by Data-Estate Coverage Scope × Action Posture

The DSPM category sits in the data-at-rest discovery quadrant. DLP shares the data-classification substrate; IRM shares the access-pattern visibility surface. CNAPP claims data security as a sub-feature of cloud-workload protection – a boundary the chapter dissects below. AI Security entrants are extending DSPM into AI-training-pipeline and vector-store coverage.

What DSPM IS. A discovery-and-posture workflow for data at rest. Coverage scope spans cloud object storage (S3, Azure Blob, GCS), managed databases and warehouses (RDS, Aurora, Snowflake, BigQuery, Databricks), SaaS data tenants (M365, Salesforce, Workday, ServiceNow), increasingly on-prem and hybrid file shares, and – newly – AI-training pipelines (training data corpora, vector embeddings, RAG indexes) ^{6 1 3}. Classification is AI-classifier-led in 2026 vendor narratives, with regex-and-fingerprint relegated to fallback paths. The action posture spans pure visibility (recommendation-only, leave remediation to DLP and IAM controls), guided remediation (the platform proposes posture changes that the buyer approves and applies through downstream tools), and automated remediation (the platform applies posture changes inline – IAM tightening, encryption-at-rest enforcement, sensitive-data quarantine, or – in the most aggressive vendor positioning – automated DLP-style inline blocking on egress). The 2026 DSPM product surfaces commonly include: cloud-data-store connectors, SaaS-tenant API connectors, IAM and permissions-graph ingestion, sensitivity-classification

engines (LLM-based or trained ML), remediation workflows, and increasingly DDR (Data Detection and Response) for runtime data-access monitoring.

What DSPM IS NOT. Not a DLP alone (DLP enforces on egress; DSPM maps and recommends posture, with some vendors extending into enforcement primitives but most leaving that to DLP integration). Not a CNAPP (CNAPP secures the cloud workload – compute, network, identity, secrets – with data security as one feature among many; DSPM treats data-at-rest as the load-bearing primitive). Not a CSPM (CSPM checks cloud-configuration posture against benchmarks; DSPM checks data posture across cloud-stored data). Not an AI Security platform (AI App Sec governs the runtime of AI applications; DSPM governs the data feeding and produced by them – a separate scope ⁵). And not a data catalog or data governance tool (Collibra, Alation, OneTrust DataDiscovery) – those products lead with metadata management and governance workflows; DSPM leads with security posture and exposure reduction.

What is DSPM, and what is just CNAPP wearing a DSPM hat

The DSPM category is the muddiest of the data fronts in 2026 because four distinct vendor archetypes claim DSPM territory, each with different load-bearing primitives, and the term "DSPM" appears on product pages in ways that range from primary-category-anchor to feature-bullet-buried-in-CNAPP-taxonomy. The boundary commentary that follows uses verbatim pillars from each archetype's product surface to make the distinction concrete; the report's §3.2c scoping rule is that vendors whose primary product page leads with "DSPM" or "Data Security Posture Management" as the headline category are in §3.3 Contenders, while vendors that mention DSPM as a sub-feature of CNAPP or as one capability inside a broader platform appear in §3.4 Plays only.

Archetype 1: DSPM-native specialists. Cyera's dedicated DSPM product page leads with *"Modern DSPM. Complete data clarity. Actionable intelligence. Built for the AI era."*³. Sentra positions itself as a DSPM-led platform with adjacent Data Detection and Response⁷. Symmetry Systems self-identifies as a DSPM leader recognized in Gartner's Market Guide for DSPM (2025) and ships DataGuard as its core DSPM product⁸. Concentric AI similarly references its Gartner Market Guide recognition under the DSPM category and leads its homepage with data-security-governance framing⁹. These are the cleanest §3.3 placements – DSPM is the headline category, the product taxonomy is DSPM-anchored, and the rest of the platform is built outward from the DSPM primitive.

Archetype 2: Platform-incumbents-with-DSPM-module. Microsoft Purview ships DSPM as a dedicated module of the Purview compliance suite, with the documentation surface explicitly titled *"Learn about Data Security Posture Management (classic)"* and a successor "new DSPM" with expanded data-source coverage¹. BigID leads its homepage with *"The Only Platform Built for AI Risk at Every Layer"*¹⁰ and presents DSPM as the first sub-pillar under its Data Security product line – a "platform-led, DSPM-first" framing distinct from Cyera's DSPM-as-headline approach. Varonis, by contrast, leads varonis.com with *"Secure AI and the Data That Powers It"* and positions DSPM as a use-case module of its Data Security Platform (*"Improve your data security posture automatically"*)¹¹ – DSPM is a feature surface, not the lead category. The report's §3.2c rule resolves these by surface evidence: Microsoft and BigID have dedicated DSPM product surfaces that lead with DSPM-as-category, so they are in §3.3; Varonis's hero leads with AI+Data Security Platform and DSPM lives in the use-case nav, so Varonis is a §3.4 Plays / §3.6 Pattern Claims reference.

Archetype 3: CNAPP-extensions claiming DSPM. Wiz leads wiz.io with *"Protect Everything You Build and Run"* and positions data security inside its code-cloud-runtime CNAPP taxonomy¹²; DSPM is not a primary pillar on the homepage. Orca leads orca.security with platform-positioning copy and self-describes as "industry-leading CNAPP" in its meta-description¹³; DSPM is not mentioned on the homepage. CrowdStrike Falcon Cloud Security leads crowdstrike.com/platform/cloud-security with *"Stop cloud breaches from code to runtime"* and is positioned in IDC's MarketScape for Worldwide CNAPP and Frost Radar™ for CNAPPs¹⁴; the page taxonomy includes CSPM, ASPM, and AI-SPM, but DSPM is absent – even though CrowdStrike acquired Flow Security in 2024 for its DSPM-adjacent capability, the marketing surface continues to lead with CNAPP. FortiCNAPP, the post-acquisition rebrand of Lacework, leads with *"Cloud-Native Application Protection Platform (CNAPP)"*¹⁵ and similarly does not surface DSPM as a primary pillar. These four are §3.4-only references in this chapter; the §3.6 candidate Pattern Claim "The CNAPP-Absorbs-DSPM Thesis" examines whether their structural pull eventually displaces standalone DSPM specialists.

Archetype 4: Data-governance-and-privacy pivots to DSPM. Securiti.ai leads securiti.ai with *"Your Data Command Center™"*¹⁶ – an umbrella positioning that includes DSPM as one capability alongside Gencore AI (safe enterprise AI) and Agent Commander (agentic AI risk). Securiti's heritage is PrivacyOps; the 2024-2026 pivot is to Data Command Center framing that explicitly bundles DSPM but does not lead with it. The §3.2c rule places Securiti in §3.4 Plays. BigID's pivot from data-governance heritage to DSPM-first product taxonomy makes it a §3.3 inclusion despite the platform-led hero – the structural primitive is data discovery and classification, and DSPM is named as a

lead product surface even when the hero copy is platform-level. The two pivots are different vectors of the same underlying motion: legacy data-governance and privacy vendors are repositioning around DSPM language as the buyer term-of-art shifts.

The boundary problem is itself a load-bearing observation for §3.6 Pattern Claims. The §3.3 in-scope vendor list of eight names covers Archetypes 1 and 2; the §3.4 section covers Archetypes 3 and 4. Three candidate Pattern Claims emerge from this scope decision and are seeded for §3.6 authoring: *The CNAPP-Absorbs-DSPM Thesis* (Archetype 3 displaces Archetypes 1 and 2 on cloud workloads), *The Data-Governance-Pivot Thesis* (Archetype 4 – and BigID-style §3.3 vendors – reshape buyer expectations around DSPM as data-governance-with-security-teeth), and a third claim on AI-training-pipeline coverage as the emerging differentiator that separates Archetype 1 specialists from Archetype 3 CNAPP-extensions. This boundary discussion is methodological scaffolding the reader can interrogate; if the surface evidence shifts (a CNAPP vendor re-hero-positions DSPM, or a DSPM-native folds into a CNAPP suite), the §3.3-vs-§3.4 split reads differently and the Pattern Claims need to update with it.

Three common buyer misconceptions. First: *"DSPM is just a fancier CSPM – if I have Wiz or CrowdStrike for cloud security, I have DSPM coverage."* CSPM checks cloud-configuration posture against benchmarks; DSPM classifies the actual sensitive data sitting in those clouds and maps who can reach it. The two answer different questions, and 2026 vendor evidence shows that CNAPP-leading vendors materially de-prioritize DSPM on their hero surfaces (Wiz, Orca, CrowdStrike, FortiCNAPP all surface CNAPP/CSPM/CWPP first; DSPM appears as a sub-feature or not at all) ^{12 13 14 15} . Buyers who treat CNAPP-bundled DSPM as equivalent to a DSPM-native product are accepting a coverage-and-classification depth gap that surfaces during real-incident investigations. Second: *"DSPM is a discovery tool – I'll buy it once, build the inventory, and the data won't change."* The 2026 data estate changes weekly: SaaS connectors get added, AI training corpora grow, vector stores spin up for new agent workflows. Continuous discovery and re-classification is the actual job; one-time scans are the failure mode the 2018-era data-discovery products got wrong. Third: *"DSPM and DLP are the same product with two names – vendors are just renaming legacy DLP."* DLP enforces on egress; DSPM discovers and classifies at rest, with most §3.3 contenders surfacing remediation guidance rather than inline enforcement primitives. The convergence is real – Cyera, BigID, and Proofpoint DSPM all ship classify-and-protect bundles – but the buyer test is which primitive is load-bearing: a DSPM-led product makes posture-and-discovery decisions first and treats DLP as one of several enforcement options; a DLP-led product makes enforcement decisions first and treats discovery as setup. The §3.4 *DSPM-augments-DLP* Play (carried over from DLP Front 2

§2.2 Buyer Trends) is the structural motion that's blurring this line, but the buyer's evaluation question stays distinct.

3.2 The Terrain

DSPM is the youngest of the three data fronts and the one where "market size" is most clearly a category-boundary claim rather than a measurement. Three named forecasters reach 2026-vintage estimates that differ by approximately 80×. Frost & Sullivan places the 2024 baseline at USD 415M growing at 37.4% CAGR through 2029, under a narrow software-only "DSPM tool" definition^{17 18}. Sentra-cited material places the 2024 baseline at USD 1.86B growing to USD 22.5B by 2033 (~32% CAGR implied) under a multi-cloud DSPM platform definition¹⁹. Relyance AI's republication of InsightAce Analytic projects USD 34.2B by 2034 at 34.2% CAGR under a broader data-security-platform-including-AI-workloads definition²⁰. The spread is itself the finding: any vendor or buyer citing a single DSPM TAM should be asked which scope (tool, platform, data-security-broad) they are pricing against. Palo Alto Networks' own DSPM Market Size Guide surfaces four additional named forecasters with seven-estimate range wider than 80×¹⁸. Gartner's only publicly-citable DSPM figure is not a dollar amount but a penetration trajectory — below 1% in 2022, projected past 20% by 2026^{21 22}. That penetration framing may be the most defensible "size of the opportunity" claim in 2026 reporting.

Buyer trends. Three transactions in a six-month window reshape the DSPM buyer conversation from "buy a DSPM tool" to "evaluate the DSPM module of my cloud, identity, or data-resilience platform." Google closed its USD 32B Wiz acquisition on March 11, 2026 — the largest cloud-security deal in history; Wiz had previously absorbed DSPM into its CNAPP via the Gem Security acquisition, and the Google close embeds DSPM into the Google Cloud product surface^{23 24}. Veeam closed its USD 1.725B Securiti AI acquisition on December 11, 2025 — Securiti described in the press release as "the #1-ranked DSPM platform" by Veeam — and unveiled the DataAI Command Platform at VeeamON on May 13, 2026, mapping DSPM against 100+ regulatory frameworks including EU AI Act, DORA, GDPR, HIPAA, and NIST^{25 26}. Palo Alto Networks closed its USD 25B CyberArk acquisition on February 11, 2026, restructuring identity-led data security at scale with DSPM sitting adjacent to identity governance under the Prisma Cloud and Cortex XSIAM umbrellas²⁷. Standalone DSPM as a procurement category may be approaching its renewal-cycle limit. The Palo Alto Networks 2026 DSPM Adoption Report cites 92% of enterprises using multi-cloud architectures and 83% of IT and cybersecurity leaders identifying lack of data visibility as a primary security-posture weakness²⁸, and Sentra's 13-criteria 2026 CISO buying rubric codifies the procurement

reframe: agentless-everywhere deployment, in-environment operation, >98% unstructured-data classification accuracy, petabyte-scale cost efficiency, full remediation-workflow automation, and usage-based pricing ¹⁹ .

User trends. DSPM has a buyer/user-split problem unlike DLP. DLP has a relatively clean buyer-user mapping – security team buys, security team operates. DSPM's day-two operator is ambiguous across security, data, and privacy teams. The Wiz academy piece names "security and IT teams" as the operating unit ²⁹ ; BigID's 2026 guide describes a "data security, privacy, and compliance teams" multi-stakeholder operating model ³⁰ ; Cyera's platform documentation references "data owners" as in-scope remediation actors ³¹ . The buyer is the CISO; the operator is increasingly outside the CISO's direct org. Modern DSPM platforms route alerts to the right operator with context – Sentra's "issues routed directly to data owners" framing ¹⁹ is representative, and Forcepoint's February 2026 "Top 8 DSPM Trends" piece names trend #1 as "DSPM becomes an active security layer, not a reporting tool" ³² . A second user-side shift sits beneath this: as agentic AI moves from discovery (read-only) to action (read-write) on data, the operator question becomes "who approves the agent's read-write to sensitive data classes?" – historically a privacy / data-governance call, increasingly a security-team call when handled in real time ²⁸ .

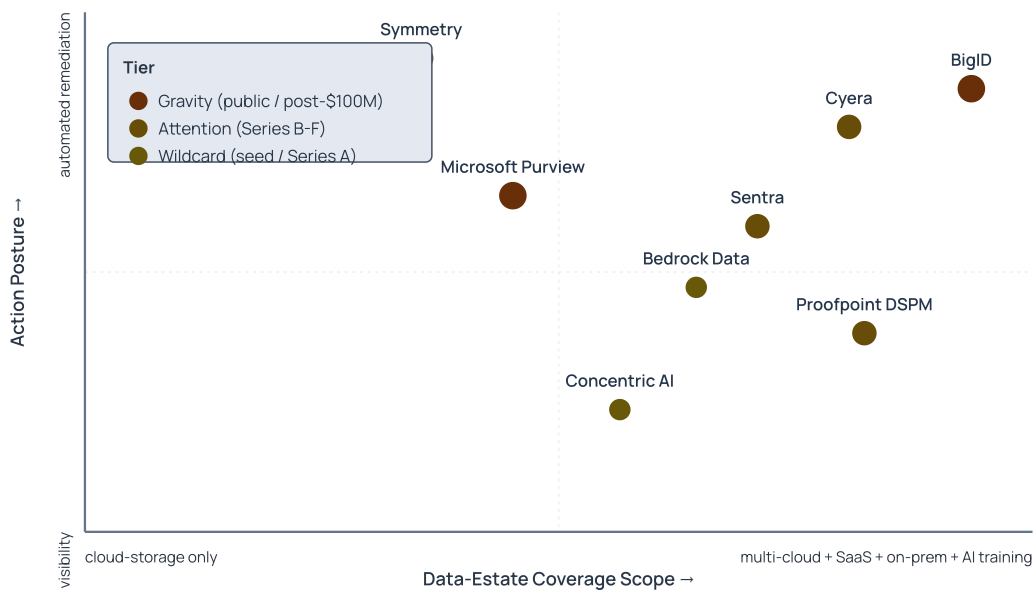
Tech trends. Four architectural shifts define the 2026 surface. First, AI training pipelines, model artifacts, vector databases, fine-tuning datasets, and RAG context stores are newly in-scope data classes. Thales, Zscaler, and Wiz all 2026-position AI-training-data as the primary new frontier for DSPM coverage ^{33 34 35} ; Zscaler explicitly markets "D(AI)-SPM" as the AI-extended DSPM category ³⁴ . Second, discovery is splitting into two camps – manifest-based scanning (catalog-and-inventory-driven) and semantic-AI-driven classification (LLM-based content classification including unstructured text). Forcepoint's 2026 trends piece names "AI-powered classification becomes table stakes" as trend #5 ³² ; Sentra's >98% unstructured-data classification accuracy threshold ¹⁹ is the semantic-AI camp's marketed bar. Third, inline enforcement – historically rare in DSPM – is emerging as the active-security-layer pivot. Veeam's DataAI Governance framing ("enforces control at the data source, not at the agent, so known and unknown agents cannot access sensitive data if that data is governed at the source" ²⁵) is the strongest 2026 named-vendor articulation. Fourth, DSPM/CNAPP convergence at the platform layer is the structural pattern post-Wiz: Wiz/Google, Palo Alto Prisma Cloud, Microsoft Defender for Cloud, CrowdStrike Falcon Cloud Security, and SentinelOne Singularity Cloud all embed DSPM within CNAPP by 2026. The standalone-DSPM category survives only where data-coverage breadth or AI-data-specific positioning materially exceeds what cloud-native CNAPP can offer.

Regulatory trends. EU AI Act Article 10 high-risk-system obligations take effect August 2, 2026 ^{36 37 38} and are the most-cited single 2026 regulatory deadline in DSPM buyer-facing material. Article 10 requires data-governance practices including "examination in view of possible biases," "appropriate data preparation processing operations," and traceability of training datasets – which maps directly onto DSPM's discovery + classification + lineage + access-governance surface. Thales, Zscaler, and Wiz all 2026-position DSPM as the compliance-evidence-generation layer for Article 10 ^{33 34 35}, and the Veeam DataAI Compliance product line maps explicitly against EU AI Act, DORA, GDPR, HIPAA, NIST, and AI RMF ²⁵. GDPR Article 30's records-of-processing requirement was historically a documentation exercise; in 2026, with AI training datasets as a new processing class, the burden is operationally infeasible without DSPM-native data inventory and lineage ³⁹. The Israeli Privacy Protection Law Amendment 13 took effect August 14, 2025 – the most significant reform of Israeli privacy law since 1981 ^{40 41 42} – substantially expanding Privacy Protection Authority enforcement powers, mandating DPO appointment, and strengthening the Protection of Privacy Regulations (Data Security) 5777 baseline. For the cluster of Israeli-headquartered DSPM vendors (Cyera, Sentra, BigID by heritage), Amendment 13 is both a home-market compliance driver and a positioning asset. The US state privacy law mosaic – CCPA / CPRA plus equivalents in CO, CT, UT, VA, TX, FL, OR, MT – extends through 2026 with jurisdiction-aware policy enforcement increasingly an RFP line item ^{43 44}.

3.3 The Contenders

Eight vendors evaluated across three tiers: **2 Gravity** (platform incumbents with structural distribution moats), **4 Attention** (DSPM-native or platform-flagship vendors with strong analyst and named-outlet sourcing), and **2 Wildcard** (Series B or earlier specialists with descriptive-only treatment per the chapter's published-material discipline).

DSPM Vendor Landscape – 2026



Author's read of public material, May 2026. Vendor positions are conceptual, not data-derived.

DSPM Vendor Landscape 2026 – 8 vendors plotted on Data-Estate Coverage Scope × Action Posture axes

*Reading the quadrants – **upper-left**: narrow-scope + automated-enforcement (depth-first specialists). **Upper-right**: broad-scope + automated-enforcement (platform vendors pushing past visibility into inline remediation). **lower-left**: narrow-scope + visibility-led (single-environment discovery tools). **lower-right**: broad-scope + visibility-led (multi-cloud DSPM-natives still maturing their remediation primitives). Tier colors mark Gravity (orange), Attention (amber), and Wildcard (pale amber).*

Author's read of public material, May 2026. Vendor positions are conceptual, not data-derived.

Gravity tier

Microsoft Purview Data Security Posture Management [cross-front: see IRM Front 1 + DLP Front 2]

"Microsoft Purview Data Security Posture Management (DSPM) enables you to quickly and easily monitor cross-cloud data and user risk through dynamic reports and trend analysis." – Microsoft Learn product docs, accessed 2026-05-14 ⁴⁵

Microsoft Purview DSPM is the volume leader by distribution reach, the same way Purview DLP is in Front 2 and Insider Risk Management is in Front 1. The buyer rarely makes a standalone DSPM purchase decision – DSPM activates as part of a broader Microsoft 365 E5 / E5 Compliance rollout or via the Microsoft Purview Suite. Microsoft now distinguishes "classic" DSPM (the surface the canonical Learn URL was first pulled from) from a "new" DSPM that "extends coverage to more data sources, introduces guided workflows for proactive risk management, and streamlines data security operations" – the new surface adds third-party SaaS and IaaS coverage via Microsoft Sentinel data-lake integrations and partner connectors (Google Cloud Platform, Snowflake, Databricks named explicitly), and integrates with partner solutions Varonis, Cyera, BigID, and OneTrust⁴⁶. The structural positioning is distinct from the standalone-DSPM cohort: Microsoft Purview DSPM is the *visibility-and-recommendation layer* on top of an enforcement estate Microsoft already sells (DLP + Insider Risk Management + Information Protection + Adaptive Protection), not a standalone discovery product. AI-and-agentic posture is the strongest sub-claim in the field for Microsoft-tenant cases: the new DSPM ships a dedicated **AI observability** page tracking agent-specific activities across Microsoft and third-party environments including the recently released Agent 365; the **Apps and agents** discovery page lists the top 20 most-recently-used agents with sensitive-data-access detail; and Activity Explorer's AI activities tab captures generative-AI prompts and responses against sensitivity-classification and DLP-rule matches⁴⁶. Stated USP: a correlation layer that processes signals from co-resident Purview solutions and surfaces recommendations to close policy-coverage gaps. Target buyer: Microsoft-standardized enterprise CISO with the M365 Purview admin as the operator. Pricing signal: bundled within M365 E5 / E5 Compliance and Microsoft Purview Suite (user-based); no standalone DSPM price disclosed. Architectural classification: SaaS-platform delivery, Microsoft-tenant-anchored with cross-cloud coverage via Sentinel and partner connectors; visibility + recommendation + guided/automated remediation for Microsoft sources, integration-mediated for non-Microsoft sources. Material tier: vendor-controlled heavy – Microsoft Learn documentation surface across both classic and new versions, Mechanics videos, FastTrack rollout playbooks, partner-integration documentation. Cross-front coherence: structurally consistent with Purview's IRM and DLP product surfaces; each module has its own product page and its own verbatim pillar.

BigID

"DSPM That Goes Beyond Visibility. Most DSPM tools stop at mapping your cloud data. BigID goes further: deep discovery, advanced classification, automated remediation, and continuous governance across every environment: not just a static snapshot." – BigID DSPM product page, accessed 2026-05-14 ⁴⁷

BigID is the data-governance-heritage vendor that pivoted to DSPM language as the buyer term-of-art shifted, and the only Gravity-tier vendor in the chapter whose product taxonomy leads with DSPM as a headline category. Stated USP per the verbatim DSPM-page pillar: DSPM that "goes beyond visibility" – deep discovery + advanced classification + automated remediation + continuous governance across multi-cloud, SaaS, IaaS, PaaS, hybrid, and AI environments ^{47 48}. The five named sub-pillars on the DSPM product page are "Agentic Risk Remediation," "Unmatched Coverage," "Identity-Aware Discovery," "Industry-Leading Classification," and "From Insight to Action," with the hero framing explicitly comparative – positioning BigID against the visibility-only DSPM-natives and against the CNAPP-extensions where DSPM is a static sub-feature ⁴⁷. Architectural lineage: BigID launched as data-discovery + privacy-ops (Series C–F era), pivoted to "data security platform" umbrella with DSPM as the first sub-pillar; the structural primitive remains data-classification-plus-context, now layered with "agentic, AI-guided prioritization and remediation" ⁴⁸. Action posture is the broadest in the field on paper – guided and automated remediation actions including "delete toxic data, redact secrets, revoke risky access, enforce retention" branded as "Agentic Risk Remediation" ⁴⁸. AI/agentic posture covers the model-side data lineage explicitly ("Govern training data, track lineage, remove toxic inputs, and detect shadow AI") plus identity-aware discovery linking data risk to real identities ⁴⁸, but the DSPM product page does not describe vector store inspection, LLM prompt classification at runtime, or agent-tool-call-boundary controls in the way Symmetry Systems or Bedrock Data do – placing BigID as broadest-coverage-with-data-governance-heritage rather than depth-first AI-runtime entrant. "Agentic" in BigID's 2026 messaging primarily refers to AI-assisted prioritization and remediation of discovered data risks, not to inline agent-runtime data-access governance. Target buyer per the verbatim DSPM-page framing: "enterprises who need more than dashboards – built to scale, take action, adapt, and stay ahead" ⁴⁷. Pricing: enterprise contract motion only, not publicly disclosed. Architectural classification: cloud-native agentless SaaS at petabyte scale, broad-but-visibility-led at the architectural primitive level despite the "Agentic Risk Remediation" pillar. Material tier: vendor-controlled heavy – dedicated DSPM product page, corporate homepage, seven-sub-pillar product taxonomy, Gartner-recognized DSPM Representative Vendor placement; Series E at \$60M led by Riverwood Capital in

March 2024 with \$1B+ post-money valuation and CEO disclosure of approaching \$100M ARR at round close ⁴⁹. The March 2024 round sits at the edge of the positioning-staleness window – flagged for refresh if a 2026 round surfaces.

Attention tier

Cyera [cross-front: see DLP Front 2]

"Modern DSPM. Complete data clarity. Actionable intelligence. Built for the AI era." – Cyera DSPM product page, accessed 2026-05-14 ⁵⁰

Cyera closed a USD 400M Series F at \$9B post-money in January 2026, a triple-up from \$3B in June 2025, with Blackstone joining the cap table alongside Accel, Coatue, Cyberstarts, Georgian, Greenoaks, Lightspeed, Redpoint, Sapphire, Sequoia, and Spark – anchored across Fortune, BusinessWire, Calcalist, and TechCrunch and the company press release ^{51 52 53}. The DSPM product page is a dedicated surface distinct from the Cyera corporate homepage and from the company's DLP-product framing in Front 2; the DSPM pillar emphasizes the foundational platform (classification + scale + signal-to-noise), the DLP pillar emphasizes the decisioning overlay above existing DLP enforcement (Front 2 row 8). The two are complementary, not contradictory – DSPM as the data-context layer; DLP as the alert-decisioning overlay above existing DLP tooling – and consistent with Cyera's umbrella positioning as an AI-native data security control plane. Stated USP per the DSPM-page architecture: three top-level pillars on the DSPM page – *"Fast deployment, limitless scale"* (agentless architecture, "Deploy in minutes and see immediate value... scan hundreds of petabytes"), *"Goodbye regex blind spots"* (AI-native classifier with 95%+ precision, no manual rules or tuning), *"Cut through the noise to prioritize real risk"* (contextual risk-prioritization) ⁵⁴. Architectural reality per the product surface: agentless cloud-native SaaS with documented support for in-cloud and on-prem deployment modes – "entirely within your cloud or on-prem environments so sensitive data remains in place" ⁵⁴ – though the on-prem mode is mid-broad on architectural disclosure and buyers evaluating sovereign-data or air-gapped DSPM should ask for an architectural diagram and named on-prem datastore connectors. Data-source coverage spans AWS, Azure, GCP, Snowflake, Databricks, Salesforce, ServiceNow, Microsoft 365 / Copilot, plus NetApp on-prem file systems (with a vendor-cited proof-point of "82M+ NetApp on-prem files scanned in under 40 days"). Action posture extends past visibility into automated remediation at scale: 30+ out-of-the-box actions including revoke access, mask sensitive data, trigger

predefined workflows, or route issues directly to data owners⁵⁴. AI/agentive posture has named product extensions – AI Guardian for shadow AI / LLM defense, AI-SPM for shadow AI / prompt monitoring⁵⁴ – and Cyera publishes an LLM-driven classifier research note that anchors the classifier substrate. Target buyer: enterprise CISO / data security director / Chief Data Officer at a multi-cloud organization with petabyte-scale data estates. Pricing: not publicly stated; demo-request is the primary motion. Architectural classification: agentless cloud-native, broad-multi-cloud-and-SaaS scope with mid-broad on-prem disclosure, mid-high action posture. Material tier: vendor-controlled heavy (dedicated DSPM product page) plus named-outlet heavy on the Series F cycle. Valuation trajectory: \$1.4B April 2024 → \$3B Series D November 2024 → \$6B Series E June 2025 → \$9B Series F January 2026 – four rounds in 21 months, the largest valuation-acceleration on record in the data-security-private cohort and the strongest discrete signal of where data-security capital is concentrating⁵⁵.

Sentra

"Prevent Data Security Catastrophes Before Copilot Rollouts. Sentra delivers unmatched AI-data governance and continuous compliance at speed and scale previously unimagined." – Sentra homepage, accessed 2026-05-14⁵⁶

Sentra is the most segment-specific positioning of the eight vendors – leading not with the DSPM category name (Cyera, BigID, Bedrock Data) or with a workflow definition (Microsoft Purview) but with a *use case* tied to a concrete enterprise buying trigger (Copilot adoption). The product taxonomy includes DSPM + Data Detection & Response (DDR) + Sentra for AI/ML + Sentra for M365 Copilot – four distinct product lines with DSPM as the foundational layer^{56 57}. Stated USP: agentless cloud-native DSPM as Copilot-readiness infrastructure, with the hybrid-intelligence classification approach explicitly described – "For structured data we use advanced statistical analysis" and "for unstructured data we use LLMs and ML to accurately understand the context of data"⁵⁷. The classifier substrate places Sentra in the same multi-paradigm AI-classifier camp as Cyera and Nightfall (Front 2), rather than the LLM-classifier-first or proprietary-substrate camps. Coverage spans AWS, Azure, GCP, M365 Copilot, AI/ML training assets, and on-prem environments via a dedicated offering⁵⁷; the homepage features comparative cost framing ("~\$40,000/yr to scan 100 PB" versus competitors at "\$400,000+/yr") – a cost-comparative signal disclosed at the homepage level without specific list pricing. Action posture progresses from visibility through recommendation and guided remediation into automated response, with Data Detection & Response as a distinct product capability that extends DSPM into a real-time data-event response

posture ⁵⁷. Target buyer: Fortune-500 enterprise security teams mid-rollout or pre-rollout on Copilot – “VP, Security Architecture” customer attribution at SoFi anchors the buyer narrative. Pricing: indirect cost-comparative signal stated; specific pricing not publicly disclosed. Architectural classification: agentless cloud-native SaaS with on-prem option, mid-scope on cloud-coverage (broad on AWS/Azure/GCP/M365 but lighter on the SaaS-tenant breadth Cyera and BigID emphasize), mid action posture with DDR as the differentiating remediation primitive. Material tier: vendor-controlled medium (homepage + DSPM product page + DDR / AI/ML / Copilot product pages). Series B at \$50M led by Key1 Capital in April 2025 with Bessemer, Zeev Ventures, Standard Investments, and Munich Re Ventures, cumulative funding \$100M+ ^{58 59}. Sentra’s deepest “AI pipeline” claims surface in blog and buying-criteria material rather than in product-page architectural documentation – vendor-controlled disclosure of vector-DB inspection at platform-product-page granularity was not surfaced during the snapshot pass, so the AI/ML coverage claim is broader than it is deep on the canonical surface.

Proofpoint Data Security Posture Management [cross-front: see IRM Front 1 + DLP Front 2]

“Proofpoint Data Security Posture Management. Proofpoint and Normalyze, a leader in data security posture management, have joined forces to discover, classify and protect data across SaaS, PaaS, multi-cloud, on-premises and hybrid environments.” – Proofpoint integration page, accessed 2026-05-14
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Proofpoint DSPM is the third Proofpoint product appearing in this report (after Proofpoint Insider Threat Management in Front 1 Gravity and Proofpoint Information Protection / Enterprise DLP in Front 2 Attention). The standalone `normalyze.ai` domain 301-redirects to the Proofpoint integration page as of access time, completing the absorption of the acquired Normalyze platform into the Proofpoint surface; the page preserves the Normalyze coverage scope claim (SaaS + PaaS + multi-cloud + on-prem + hybrid) and reframes it as a Proofpoint product, including explicit mention of Databases-as-a-Service (DBaaS) and CI/CD coverage ⁶⁰. Stated USP: discover, classify, and protect across all major data environments with “joined forces” framing positioning the integration as a partnership-of-equals narrative rather than an absorption, even though the standalone Normalyze domain has been retired. Action posture spans visibility (“Classify structured and unstructured data... using AI”), recommendation (“Prioritize human-centric risks... with recommended steps”), and guided/automated remediation (“Remediate security and compliance issues quickly with recommended

steps and automated IT workflows")⁶⁰. Inline blocking is not claimed at the DSPM surface – enforcement is recommendation-and-workflow-routed. The convergence story between Normalyze DSPM and Proofpoint Information Protection (cross-reference to Front 2 §2.3) is the load-bearing platform pitch: *"By combining Proofpoint's leading human-centric security platform with Normalyze's pioneering DSPM technology, we can provide you with comprehensive visibility and control"*⁶⁰. The page does not name a shared classifier substrate, a unified control plane, or specific data-flow handoffs between DSPM-discovered classes and Information Protection enforcement points – which makes the convergence read as a go-to-market claim more than a shipped architectural integration at the time of the snapshot. Buyers should ask for a reference architecture before assuming DSPM-to-DLP / DSPM-to-ITM enforcement integration is shipping at product-flagship maturity. Target buyer: email-security-led CISO at a Proofpoint-standardized organization rationalizing the data-security stack into the Proofpoint platform – same buyer narrative as the Front 1 ITM and Front 2 DLP products, extended to DSPM. Pricing: not publicly stated; bundled into Proofpoint platform pricing motion. Architectural classification: vendor-controlled medium on the integration page (vendor-controlled heavy at the parent Proofpoint platform), agentless cloud-native inherited from the Normalyze legacy though deployment-model granularity is not specified on the integration page itself; broad coverage scope, mid action posture. Material tier: vendor-controlled medium (integration page; standalone Normalyze domain retired); Proofpoint is a Thoma Bravo take-private (August 2021, USD 12.3B transaction value) that reportedly crossed \$2B ARR mid-2024 under Thoma Bravo ownership. The DSPM page reads as a recent-integration Normalyze-line, not as a mature Proofpoint-flagship like Information Protection – Attention tier holds at this snapshot. Move to Gravity at next refresh if the hero positioning shifts across the parent Proofpoint surface.

Symmetry Systems

*"Secure Data. Control Agents. Unleash AI. You can't truly secure your data or govern your AI without knowing who or what can reach both. Symmetry unifies identity, data, and AI risk into one view – so you can act, not just observe." – Symmetry Systems homepage, accessed 2026-05-14*⁶¹

Symmetry Systems is the most architecturally heterogeneous deployment story in the eight-vendor list and the candidate that most cleanly tests the chapter's Action Posture Y-axis. Five named deployment options – Managed SaaS (SOC 2 Type II certified), Outpost (classification compute inside customer VPC / on-prem), In-Your-Environment (self-managed IaC), Geographically Federated (separate instances per

region, "Data never crosses sovereign boundaries"), and Air-Gapped ("World's first air-gapped DSPM for defense, federal, and healthcare environments")⁶². Stated USP: the **Identity × Data Graph** as the structural differentiator – "The only unified graph connecting every identity to every data object" that fuses humans, service accounts, AI agents, and third-party vendors into one access-and-permissions view⁶². Two named product anchors: DataGuard (DSPM core with built-in enforcement) and AIGuard (AI agent identity and governance). Coverage spans AWS, GCP, Azure, OCI, on-prem infrastructure, SaaS applications, and AI/LLM data – with "every AI agent and copilot" access-governance positioning as the 2026 emphasis⁶². Action posture extends past visibility into automated remediation with built-in enforcement: "*DataEnforce automatically remediates misconfigurations, revokes excess permissions, and enforces policy*"⁶². AI/agent posture is the sharpest in the field – Symmetry positions AI agents as first-class principals "not retrofitted" and names the structural problem: agents "authenticate via shared service accounts your IAM treats as trusted infrastructure – no session, no MFA, no individual identity to inspect," to which Symmetry responds with native AI agent visibility giving agents "their own identity, access graph, scope policies, and audit trail"⁶². The control point is the data-store access boundary, not the LLM-or-agent-runtime boundary – architecturally cleaner than inline-prompt inspection but worth flagging for buyers who expect "control AI agents" to mean prompt-time or tool-call-time intervention. Target buyer: enterprise security leaders at organizations operating large-scale identity infrastructure (Active Directory / Entra / Okta-heavy estates) with AI agents emerging as first-class principals; customer types named on the page span Fortune 50 retailers, Big 4 consulting, healthcare RCM, biotech, and defense contractors. Pricing: not publicly stated; a "*Start free trial*" CTA appears alongside the standard "*Request a Demo*" – the only self-serve signal across the eight vendors, though no tier or price is shown. Architectural classification: hybrid SaaS / in-environment / air-gapped, mid-broad on cloud-coverage scope but broadest on deployment-architecture dimension, high action posture (DataEnforce remediation plus AI-agent identity enforcement at the data-store boundary). Material tier: vendor-controlled medium (homepage + product page); Gartner DSPM Representative Vendor 2025⁶³ and 2024 Strong Performer Peer Insights Voice of the Customer. Last named-outlet funding round is the July 2023 \$17.7M inside round led by ForgePoint Capital – ~34 months stale at access time, which fails the chapter's positioning-staleness window; per the snapshot policy this is a War Chest-row staleness, not a §3.3 positioning concern, and the product-page material is current and on-brand. The funding-staleness disposition is treated separately in §3.5.

Wildcard tier

Concentric AI

"Intelligent data security made easy. Governance for your data at rest, data in motion, and GenAI applications." – Concentric AI homepage, accessed 2026-05-14 ⁶⁴

Concentric AI is one of two Wildcard placements in the chapter, treated descriptively per the chapter's published-material discipline. Stated USP: Semantic Intelligence™ as the proprietary technology layer – vendor-named as "patented context-aware AI" with capabilities described as "precise labeling powered by categorization" ⁶⁴, though the technical substrate (deep-learning architecture, training corpus, fine-tuning approach) is not publicly disclosed at vendor-page granularity. The hero framing is the simplest, broadest, least segment-specific of all eight vendors – "made easy" is the structural marker of a vendor differentiating on deployment ease rather than on architectural primitive. The subhero names three coverage states (rest + motion + GenAI applications) placing Concentric on the multi-channel side of the chapter's coverage-scope X-axis. Coverage spans cloud (Snowflake, AWS S3, Google Workspace, Microsoft 365), on-prem (named natively), SaaS / collaboration (Slack, Confluence, Salesforce, Microsoft Exchange), GenAI applications (Claude, ChatGPT, Microsoft Copilot, Google Gemini, Perplexity named explicitly), and infrastructure (NetApp, Amazon RDS, Microsoft SQL Server) ⁶⁴. The differentiator claims are "Agentless" and "10 Minutes POC deployment time" – speed and friction are the primitives, targeting buyers frustrated with deployment-heavy DSPM tooling. Action posture spans visibility (foundational discovery and classification), recommendation (risk identification and insight generation), and automated remediation ("Centralized remediation" capability); inline blocking is not detailed on the homepage. GenAI posture is the strongest sub-claim – visibility into Claude / ChatGPT / Copilot / Gemini / Perplexity conversations plus named integrations for prompt monitoring – placing Concentric in the prompt-inspection sub-category alongside Cyera AI Guardian, with vector-store or agent-tool-call inspection not described at product-page granularity. Target buyer: enterprise CISO / CIO / VP of Infrastructure (named customer roles on the page). Pricing: usage-based model disclosed – "Prices are based on the amount of structured and unstructured data scanned" ⁶⁴ – the only vendor of the eight to publicly disclose its pricing model, even without disclosing the rates. Architectural classification: agentless API-based SaaS, mid-broad coverage scope, visibility-led with mid action posture. Material tier: vendor-

controlled medium; Gartner Recognized Vendor for DSPM per the page; Series B at \$45M led by Top Tier Capital Partners and HarbourVest Partners in October 2024, cumulative funding \$67M+ ⁶⁵ ⁶⁶ . The October 2024 Series B sits at the edge of the positioning-staleness window – flagged for refresh in next quarterly cycle.

Bedrock Data (formerly Bedrock Security)

"THE AI-NATIVE DSPM. Prevent data leakage and misuse as your data accelerates across cloud and on-premise. Bedrock Data autonomously classifies petabytes in hours to drive native policy enforcement." – Bedrock Data homepage, accessed 2026-05-14 ⁶⁷

Bedrock Data is the second Wildcard, treated descriptively. The company rebranded from "Bedrock Security" to "Bedrock Data" in mid-2026 – the `bedrock.security` domain now 301-redirects to `bedrockdata.ai`, no rebrand-announcement banner appears on the page, and the wordmark shifted from `.security` TLD positioning to `.ai` TLD positioning. The product still leads with DSPM as the headline category, so the chapter scoping discipline holds: Bedrock is in §3.3 on product-positioning grounds. Stated USP: AI-native DSPM with autonomous classification at petabyte scale and native policy enforcement as the structural primitive ⁶⁷ . The opening sentences make three claims – AI-native classification, petabyte-scale-in-hours speed, and native policy enforcement (not just visibility) – backed by a comparative claim of "25x lower infrastructure cost" versus competitors, the only explicit cost-comparative claim among the chapter's Wildcards. Architectural primitive: the **Metadata Lake** and **Serverless Outpost** – "serverless Outpost scans SaaS, IaaS, and on-premise environments" under a "Zero Data Access architecture" that keeps scanning "entirely within your perimeter" ⁶⁷ . Coverage spans SaaS, IaaS, and on-prem at "petabyte" scale; the page makes named claims about AI training pipelines – "Confidently deploy assistants, RAG systems, and autonomous agents" via the ArgusAI module – but does not explicitly enumerate vector stores or embedding databases at product-page granularity ⁶⁷ . Action posture progresses from visibility through assessment to guided and automated remediation, plus native enforcement that "syncs granular sensitivity tags and labels directly to data stores" and enforces "least privilege access... automating policy controls" ⁶⁷ . AI/agent posture has named claims – "Model consumption of sensitive datasets is audited, preventing AI assistants from surfacing restricted content" and ArgusAI "connects the Metadata Lake to AI applications to trace data flow and user interaction" – these are RAG-pipeline-anchored claims, distinct from Symmetry's identity-graph-anchored AI-agent control and from Cyera / Concentric's prompt-inspection claims. The Zero-Data-Access metadata-only architecture is

structurally attractive for sovereign-data and regulated-industry buyers but creates a trade-off – RAG-pipeline visibility and AI-inference-time auditing depend on what metadata gets indexed and how completely the Metadata Lake mirrors the underlying data store, so buyers should ask for a clear scope-of-coverage document before assuming RAG inference monitoring is comprehensive. The deeper architectural disclosure – Metadata Lake schema, classifier training methodology, ArgusAI integration depth with the named integration targets (Microsoft Purview, Snowflake, AWS) – is not yet in publicly-citable form, so the AI-data-flow claims read as a forming category-extension rather than a fully-shipped architecture. Target buyer per the page: enterprise organizations managing sensitive data across multi-cloud environments, with a customer quote attributed to “*Sr. Director Product Security, Fastest Growing US Fintech Co.*” anchoring financial services as a key target. Pricing: not publicly stated; comparative cost claim disclosed without absolute pricing. Architectural classification: agentless / serverless hybrid, mid-broad coverage scope, mid-high action posture with native enforcement. Material tier: vendor-controlled medium (homepage is current and on-brand; product page leads with DSPM as headline); Series A at \$25M led by Greylock Partners in November 2025 (prior \$10M seed from Greylock in 2024), 2024 RSA Conference Innovation Sandbox Finalist ^{68 69}. Brand transition is a positioning fact, not an M&A indicator.

3.4 Their Plays

Five strategic moves shape the DSPM front through H2 2026 and into 2027.

Play 1: CNAPP-Absorbs-DSPM Suite Bundling

- **Observation.** Five CNAPP-led vendors – Wiz (now Google, post-USD-32B close March 11, 2026 ^{23 24}), Orca Security ⁷⁰, CrowdStrike Falcon Cloud Security (with the acquired Flow Security 2024 DSPM-adjacent capability) ⁷¹, FortiCNAPP (post-Fortinet’s acquisition of Lacework) ⁷², and Aqua – position DSPM as a sub-feature inside the code-cloud-runtime CNAPP taxonomy. None of the five leads with DSPM as a primary pillar on the homepage. Wiz had previously absorbed DSPM into its CNAPP via the Gem Security acquisition; the Google close embeds that bundle into the Google Cloud product surface. CrowdStrike’s page taxonomy includes CSPM, ASPM, and AI-SPM but not DSPM – even though Flow Security was acquired for the DSPM-adjacent capability.
- **Participants.** Wiz / Google Cloud, Orca, CrowdStrike Falcon Cloud Security (Flow Security inside), FortiCNAPP (Lacework inside), Aqua – versus the standalone DSPM-natives (Cyera, BigID, Sentra, Symmetry Systems, Bedrock Data,

Concentric AI) and the platform-incumbents-with-DSPM-module (Microsoft Purview, Proofpoint DSPM).

- **Conditional outcome.** *If Q3-Q4 2026 earnings disclosures from Wiz/Google Cloud, CrowdStrike, Palo Alto Networks, or Microsoft segment results cite "CNAPP-bundled DSPM" or "DSPM-as-platform-module" as a named contributor to enterprise growth – AND Gartner's next Market Guide for DSPM (or equivalent Forrester / IDC publication) reclassifies CNAPP-extension vendors into the primary DSPM table – the bundling motion has reorganized the cloud-data-security buying process and standalone DSPM-natives face structural pricing pressure inside cloud-workload accounts. If H2 2026 earnings cycles produce no such DSPM-bundle disclosures and the next Gartner/Forrester DSPM cycle keeps CNAPP-extensions in a secondary segment, the standalone DSPM-natives hold their lane and CNAPP-bundled DSPM remains a sub-feature competitive disadvantage.*
- **Evidence.** Google-Wiz \$32B close cleared Nov 2025 (TechCrunch), close confirmed early 2026 ²³ ²⁴ ; CrowdStrike Falcon Cloud Security product page taxonomy and Flow Security acquisition coverage ⁷¹ ; FortiCNAPP product page (post-Lacework absorption) ⁷² ; Orca platform-positioning copy and CNAPP self-description ⁷⁰ .

Play 2: Data-Privacy-Ops Pivot to Data Command Center

- **Observation.** Securiti AI repositioned its PrivacyOps heritage into a "Your Data Command Center™" umbrella that bundles DSPM as one capability alongside Gencore AI (safe enterprise AI) and Agent Commander (agentic AI risk) ⁷³ . Veeam closed its USD 1.725B Securiti AI acquisition on December 11, 2025 ⁷⁴ and unveiled the DataAI Command Platform at VeeamON on May 13, 2026, mapping the platform against 100+ regulatory frameworks including EU AI Act, DORA, GDPR, HIPAA, NIST, and AI RMF ⁷⁵ . Veeam's DataAI Governance framing – "enforces control at the data source, not at the agent, so known and unknown agents cannot access sensitive data if that data is governed at the source" ⁷⁵ – completes the pivot from PrivacyOps to data-source-enforcement-anchored DSPM.
- **Participants.** Veeam (data-resilience-led parent), Securiti AI (absorbed DSPM platform), Rehan Jalil (Securiti founder, now Veeam President of Security and AI). Adjacent: BigID's parallel data-governance-pivot to DSPM-first product taxonomy.

- **Conditional outcome.** *If Veeam's DataAI Command Platform wins enterprise data-resilience-anchored buying cycles by H2 2026 with DSPM as a load-bearing module, the data-privacy-ops-pivot vector has produced a viable third platform-absorption path alongside CNAPP-bundled DSPM and identity-led DSPM. If the platform remains a positioning narrative without flagship deployments through 2027, the pivot is marketing-tier and Veeam returns to a backup-and-resilience-led pitch.*
- **Evidence.** Securiti.ai homepage and "Your Data Command Center" framing ⁷³; Veeam-Securiti close December 11, 2025 (Veeam PR, BusinessWire, Bloomberg, TechCrunch) ⁷⁴; Veeam DataAI Command Platform launch May 13, 2026 (Veeam PR via Morningstar, SiliconAngle) ⁷⁵.

Play 3: AI-Training-Pipeline Coverage as the Standalone-DSPM Survival Path

- **Observation.** Zscaler explicitly markets "D(AI)-SPM" as the AI-extended DSPM category ⁷⁶. Cyera, Sentra, BigID, and Bedrock Data all 2026-ship AI-training-data discovery, model-output classification, and vector-DB / RAG-pipeline coverage as the differentiator separating them from CNAPP-bundled DSPM ⁷⁷. Microsoft Purview's new DSPM ships a dedicated AI observability page tracking Agent 365 and Apps-and-agents discovery surface ⁴⁶. The structural read: standalone DSPM vendors that frame primarily as "discover and classify sensitive data" face platform-absorption pressure (Play 1); standalone DSPM vendors that frame primarily around AI-training data, model artifacts, vector DBs, and AI access capture an under-served frontier where CNAPP-embedded DSPM has not caught up yet.
- **Participants.** Cyera (AI Guardian + AI-SPM extensions), Sentra (Sentra for AI/ML + Copilot product lines), BigID (training data lineage + shadow AI detection), Bedrock Data (ArgusAI + RAG-pipeline framing), Zscaler (D(AI)-SPM trade name), Microsoft Purview (Agent 365 + AI observability). Watch: Wiz academy publishes "DSPM for AI Best Practices" ⁷⁷ – CNAPP catching up at the marketing layer if not yet at the product layer.
- **Conditional outcome.** *If by Q4 2026 at least three of the eight §3.3 DSPM contenders publicly add vector-store inspection, embedding-database posture, or agent-tool-call access as headline product-page capabilities (snapshot-comparable to today's pages) – AND at least two of those vendors publish named reference deployments via press release or named-outlet coverage – the*

AI-data-positioned subset of the standalone DSPM cohort has a durable survival path through 2027. If CNAPP vendors (Wiz, Orca, CrowdStrike Falcon Cloud Security, FortiCNAPP) ship competitive AI-pipeline DSPM modules with public product-page hero claims and named customer-win coverage within a renewal cycle, the standalone window closes.

- **Evidence.** Zscaler D(AI)-SPM page ⁷⁶ ; Wiz DSPM for AI Best Practices academy piece ⁷⁷ ; Cyera AI Guardian product framing ⁵⁴ ; Sentra AI/ML and Copilot product lines ⁵⁷ ; BigID training-data lineage claims ⁴⁸ ; Bedrock Data ArgusAI / RAG framing ⁶⁷ ; Microsoft Purview new DSPM AI observability ⁴⁶ .

Play 4: Varonis AI-Native Repositioning

- **Observation.** Varonis (NASDAQ: VRNS) leads varonis.com with “*SECURE AI AND THE DATA THAT POWERS IT*,” with the opening “*Confidently adopt AI, reduce data exposure, and stop AI-powered threats, automatically*” – repositioning the broader Varonis Data Security Platform around AI-data-security as the hero category rather than DSPM ⁷⁸ . The DSPM use-case page is a module of the platform, not the lead category; module language reads “*Improve your data security posture automatically.*” Varonis Q1 2026 results released April 28, 2026 (revenue \$173.1M, +27% YoY; SaaS ARR ex-conversions \$522.6M, +29%; total SaaS ARR \$683.2M including conversions) ⁷⁹ show the public-vendor side of the story; the cross-front context from the IRM Front 1 chapter (October 28, 2025 stock drop, ~5% layoff, securities class action filed January 2026) frames the repositioning push.
- **Participants.** Varonis (lead actor) plus the broader legacy-data-security cohort repositioning around AI-data-security framing. Adjacent: Microsoft Purview’s new DSPM with Varonis named as a partner-integration target.
- **Conditional outcome.** *If Varonis’s AI-Native repositioning shows in named-outlet enterprise reference wins through H2 2026 as DSPM-platform-replace deals against legacy estates, the repositioning has translated from messaging into pipeline. If Q3-Q4 2026 earnings cycles show flat-or-declining new-logo DSPM-attributed bookings, the repositioning is positioning-tier without buying-process traction and the platform-bundle motion remains a narrative move.*
- **Cross-reference.** This play is the fourth absorption vector in the chapter – alongside CNAPP-bundled DSPM (Play 1), data-privacy-ops-pivot (Play 2), and identity-led DSPM (Play 5), legacy-data-security AI repositioning is the fourth

way DSPM-as-line-item arrives inside a larger platform purchase. Pattern Claim 1 documents the cumulative effect.

- **Evidence.** Varonis homepage and DSPM use-case page (accessed 2026-05-14)⁷⁸; Varonis Q1 2026 earnings (April 28, 2026)⁷⁹; cross-reference to the IRM Front 1 chapter for the Q4 2025 / Q1 2026 platform-context events.
- *Not investment advice. See Disclosures.*

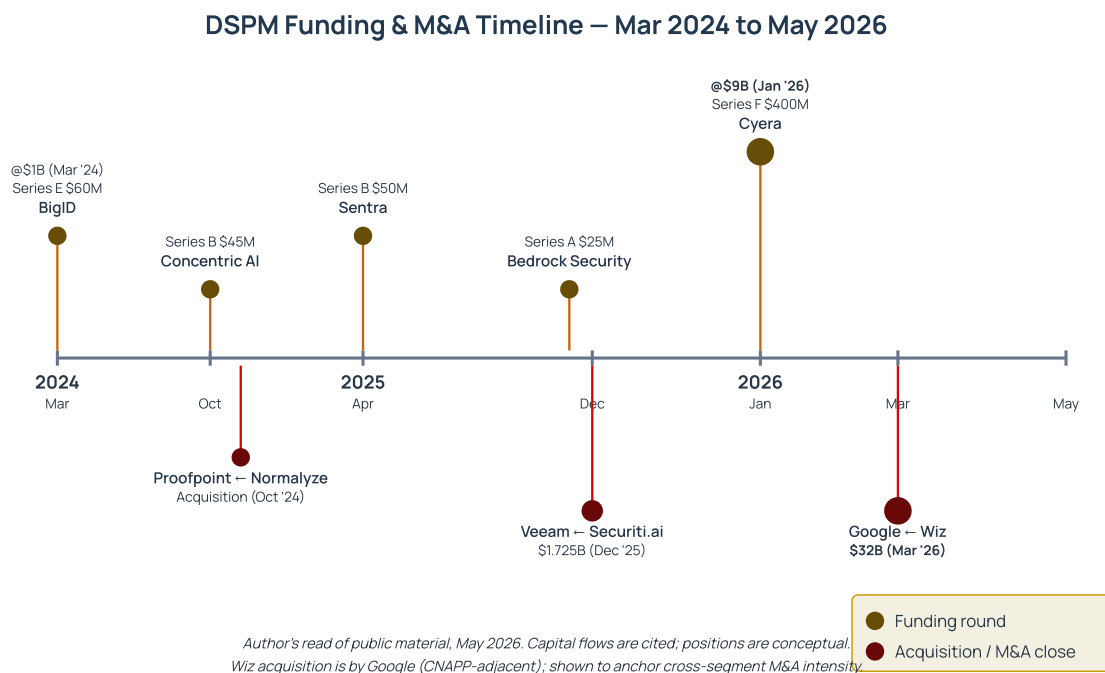
Play 5: Identity-Led DSPM via Symmetry's Identity × Data Graph

- **Observation.** Symmetry Systems positions the Identity × Data Graph as the structural primitive – "The only unified graph connecting every identity to every data object" that fuses humans, service accounts, AI agents, and third-party vendors into one access-and-permissions view⁶². The framing intersects with the Palo Alto Networks / CyberArk close (USD 25B, February 11, 2026) which restructures identity-led data security at scale and cites an 80-to-1 machine-vs-human identity ratio²⁷. The play is a category-level architectural claim that DSPM enforcement increasingly anchors at the identity-and-data-graph layer rather than at the content-classification-only layer.
- **Participants.** Symmetry Systems (lead architectural articulator); Palo Alto Networks / CyberArk (largest identity-led platform consolidator); adjacent: Microsoft Purview (Entra-bundled identity-aware DSPM), BigID (identity-aware discovery sub-pillar)⁴⁸.
- **Conditional outcome.** *If by Q4 2026 either (a) Palo Alto Networks earnings disclosures cite the Cortex XSIAM + Prisma Cloud + CyberArk integration with DSPM-attached wins as a named contributor; OR (b) Microsoft Purview DSPM publicly adds "Entra ID identity-graph DSPM" as a headline capability with named reference customers; OR © Gartner's next Market Guide for DSPM reclassifies identity-graph integration as a baseline DSPM capability rather than a feature, the identity-led DSPM pitch has reorganized the enforcement primitive and content-classification-only DSPM specialists face structural displacement at the architectural layer. If none of those three signals materialize through 2027 and vendor product pages continue marketing identity-integration as a discrete adjacent feature, the identity-led pitch is platformization narrative rather than enforcement-architecture change.*

- **Evidence.** Symmetry Systems homepage and product page (Identity × Data Graph framing) ^{61 62}; Palo Alto Networks / CyberArk close release with 80-to-1 machine-vs-human ratio ²⁷; BigID DSPM page identity-aware discovery pillar ⁴⁸.

3.5 War Chests & Casualties

Snapshot of recent funding events, valuations, strategic investors, and any documented distress signals across the DSPM front. All figures trace to vendor-controlled surfaces, SEC filings, or named-outlet journalism (Fortune, TechCrunch, Reuters, Bloomberg, Calcalist, BusinessWire, GlobeNewswire, PRNewswire, SecurityWeek, Times of Israel, SiliconAngle). Executive transitions appear as positioning facts when corroborated by company PR plus a named outlet; LinkedIn-only signals are not used.



DSPM Funding Events – 2023 to 2026, by date, magnitude, and event type

A three-year compression of the DSPM money story: Symmetry Systems' July 2023 \$17.7M inside round; BigID's March 2024 Series E at \$1B+ valuation; Concentric's October 2024 Series B; Proofpoint's October 2024 absorption of Normalyze; Sentra's April 2025 Series B; Bedrock Data's November 2025 Series A; Veeam's December 2025 close of Securiti AI at \$1.725B; Cyera's January 2026 Series F at \$9B post-money; and Google's \$32B close of Wiz in early 2026 as the cross-front anchor for the CNAPP-Absorbs-DSPM thesis.

VENDOR	MOST RECENT ROUND	VALUATION (IF PUBLIC)	STRATEGIC INVESTOR	DISTRESS SIGNAL
Microsoft (Purview Data Security Posture Management – module within Microsoft Purview / Microsoft 365 E5 / E5 Compliance) ⁸⁰	n/a – bundled within M365 E5 + Defender for Cloud licensing	Public parent (NASDAQ: MSFT); FY25 total revenue \$281.7B (+15% YoY); Purview DSPM revenue not broken out separately	n/a – platform parent	<i>(empty – no public distress event)</i>
BigID (private; legacy data-governance vendor repositioned to DSPM + AI-data-security) ⁴⁹	Series E – \$60M led by Riverwood Capital with Silver Lake Waterman and Advent, announced March 20, 2024; cumulative funding \$320M	\$1B+ post-money valuation; CEO disclosed approaching \$100M ARR at round close	Riverwood Capital; prior rounds: Silver Lake Waterman, Advent, Tiger Global, Bessemer	<i>(empty – no public distress event; March 2024 Series E is at the 24-month positioning window edge; flagged for refresh if a 2026 round surfaces before chapter publication)</i>
Cyera (private; DSPM-native; cross-front to DLP Front 2) ⁵⁵	Series F – \$400M led by funds managed by Blackstone with Accel, Coatue, Cyberstarts, Georgian, Greenoaks, Lightspeed, Redpoint, Sapphire, Sequoia, Spark, announced January 8, 2026; cumulative funding \$1.7B+	\$9B post-money valuation (Jan 2026 Series F); trajectory \$1.4B Apr 2024 → \$3B Series D Nov 2024 → \$6B Series E Jun 2025 → \$9B Series F Jan 2026	Blackstone (NYSE: BX) – new strategic investor in Series F; prior round leads: Sequoia, Accel, Coatue, Lightspeed, Greenoaks, Georgian	<i>(empty – no public distress event)</i>
Sentra (private; DSPM-native, AI-data-security positioning) ⁵⁸	Series B – \$50M led by Key1 Capital with Bessemer Venture Partners, Zeev Ventures, Standard Investments, Munich Re	Private – not disclosed	Key1 Capital; prior rounds: Bessemer Venture Partners, Zeev Ventures, Standard Investments,	<i>(empty – no public distress event)</i>

VENDOR	MOST RECENT ROUND	VALUATION (IF PUBLIC)	STRATEGIC INVESTOR	DISTRESS SIGNAL
	Ventures, announced April 22, 2025; cumulative funding \$100M+		Munich Re Ventures	
Concentric AI (Wildcard – private; DSPM with semantic deep-learning classification) ⁶⁵	Series B – \$45M led by Top Tier Capital Partners and HarbourVest Partners with Ballistic Ventures, Engineering Capital, Clear Ventures, Citi Ventures, CyberFuture, announced October 23, 2024; cumulative funding \$67M+	Private – not disclosed	Top Tier Capital Partners; HarbourVest Partners; Citi Ventures	<i>(empty – no public distress event; Wildcard descriptive treatment per chapter discipline)</i>
Bedrock Data (formerly Bedrock Security; Wildcard – private; AI-native DSPM with Metadata Lake / ArgusAI) ⁸¹	Series A – \$25M led by Greylock Partners, announced November 19, 2025; prior \$10M seed from Greylock 2024; cumulative funding \$35M	Private – not disclosed	Greylock Partners	<i>(empty – no public distress event; 2024 RSA Innovation Sandbox Finalist; brand transition from Bedrock Security to Bedrock Data is positioning fact, not distress)</i>

The DSPM funding cycle is the loudest of the three data fronts in this report. Cyera’s January 8, 2026 Series F at \$9B post-money is the single largest data-security-private mark on the table and the strongest discrete signal in the pilot – Blackstone joining the cap table on a triple-up from \$3B (November 2024) → \$6B (June 2025) → \$9B (January 2026) inside fourteen months ⁵⁵. Sentra’s \$50M Series B (April 2025) and Concentric’s \$45M Series B (October 2024) cluster a second tier of well-capitalized DSPM-natives ^{58 65}; Bedrock Data’s \$25M Series A (November 2025, led by Greylock) sits at the early-Wildcard band ⁸¹. Vendor absorption is the second pattern – Proofpoint absorbed Normalyze (October 2024) ⁸², Veeam closed its \$1.725B Securiti AI acquisition (December 2025) ⁸³, and Google’s \$32B Wiz close (early 2026) puts DSPM-adjacent CNAPP behind a hyperscaler ⁸⁴. Two vendors evaluated for vendor-card inclusion above

but treated separately here: Symmetry Systems' last named-outlet round is the July 2023 \$17.7M inside round (ForgePoint Capital), ~34 months stale against the chapter's freshness window – Symmetry remains an in-scope Attention vendor on product-positioning grounds but does not carry funding-side material at the named-outlet sourcing bar ⁶⁶. Securiti AI (Veeam absorption) and Normalyze (Proofpoint absorption) are no longer independent vendors and appear as M&A absorption anchors in the strategic-moves and pattern-claim sections rather than as standalone rows. Varonis is a public-company cross-reference to the IRM Front 1 chapter – the October 28, 2025 single-day stock drop, ~5% layoff, and January 2026 securities class action are all anchored in IRM and not duplicated here; the DSPM-front positioning is platform-relevant (the broader Varonis Data Security Platform reframed around AI-data-security), not distress-relevant. See Phase 3 Venture Landscape chapter for deep analysis.

Not investment advice. See Disclosures.

3.6 Winning & Losing

Two themes shape what's winning and losing in DSPM in 2026. Each is anchored to public evidence, framed explicitly as opinion, and stated as a falsifiable prediction the next twelve to eighteen months will either confirm or refute.

Pattern Claim 1 – The DSPM Absorption Chain

Observation. Six DSPM-relevant M&A events across roughly two years restructure DSPM as a category that platform-incumbents absorb rather than DSPM-natives consolidate. IBM acquired Polar Security (May 2023, folded into Guardium); Palo Alto Networks acquired Dig Security (November 2023, folded into Prisma Cloud); CrowdStrike acquired Flow Security (March 2024, folded into Falcon Cloud Security); Rubrik acquired Laminar Security (June 2024); Proofpoint absorbed Normalyze (October-November 2024, now Proofpoint DSPM) ⁸⁵; Veeam closed its USD 1.725B acquisition of Securiti AI on December 11, 2025 ⁸⁶; and Google closed its USD 32B acquisition of Wiz in early 2026 ⁸⁷. The DSPM-pure-play vendor population has thinned materially across this window – three categories of acquirer have entered the absorption (legacy-data-security platforms like IBM Guardium and Rubrik, identity/CNAPP platforms like Palo Alto and CrowdStrike, data-resilience and cloud-hyperscaler platforms like Veeam and Google). At the same time, Cyera's January 2026 Series F at \$9B post-money ⁸⁸ is the strongest counterweight – the standalone DSPM leader is the largest pure-play data-security private mark in the pilot, but the company's own platform-extension messaging (AI Guardian, AI-SPM, DLP overlay) signals it sees the same gravity its acquired peers folded into.

My read. I read this as DSPM moving from a standalone procurement category to a *line item inside larger data-security, cloud-security, or data-resilience platform RFPs* – the structural pattern documented across three platform-absorption vectors (CNAPP-bundled, data-privacy-ops-pivot, identity-led). The Cyera \$9B counterweight is real but does not refute the thesis; it confirms that the standalone-DSPM lane has narrowed to a small number of vendors with enough AI-data-specific differentiation and capital depth to resist absorption. The lane is narrow, not closed: \$9B is wallet-bounded against hyperscaler and data-resilience platform M&A budgets that already routinely clear that mark, and the Veeam-Securiti close at sub-\$2B is a reminder that absorber-willingness is not the constraint. The mid-tier DSPM-natives (Sentra, BigID, Symmetry Systems, Concentric AI, Bedrock Data) face the same gravity, with the survival path running through AI-training-pipeline coverage rather than through generalist DSPM positioning (Play 3).

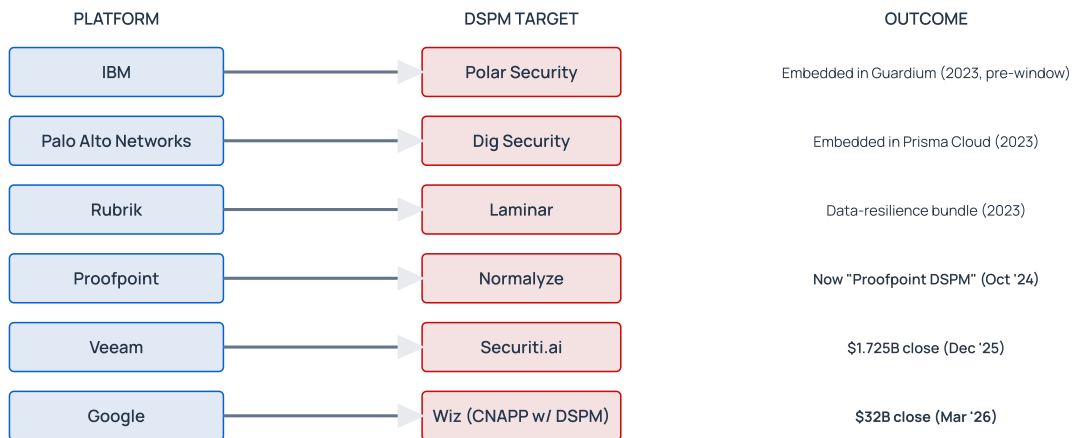
Conditional prediction. *If at least one of the mid-tier DSPM-natives (Sentra, BigID, Symmetry Systems, Concentric AI, Bedrock Data) announces an*

acquisition by a platform incumbent within the next twelve months – AND Q3-Q4 2026 earnings calls from CrowdStrike, Wiz/Google Cloud, Palo Alto Networks, or Microsoft segment disclosures cite "DSPM-bundled" or "DSPM-platform-replace" wins as a named contributor to enterprise growth – AND Gartner's next Market Guide for DSPM (or equivalent Forrester / IDC publication) reclassifies CNAPP-extension vendors into the primary DSPM table, the absorption thesis is structurally durable through 2027 and standalone DSPM-natives face renewal-cycle pricing pressure. If H2 2026 produces a fresh Series E-or-larger raise for a standalone DSPM-native without a platform-acquisition narrative – AND at least two named-outlet (Bloomberg, Reuters, Fortune, TechCrunch, Calcalist, SecurityWeek, Dark Reading) 2026-2027 enterprise reference wins for that DSPM-native surface as platform-replace deals against CNAPP-bundled DSPM – the standalone lane is wider than the absorption pattern suggests and the thesis weakens.

Sources. ^{85 86 87 88}

Pattern Claim 1: The DSPM Absorption Chain

Six platform absorptions in 14 months; Cyera \$9B is the strongest counter-thesis



⚡ Counter-thesis: Cyera Series F \$9B
Backstone-led, Jan 2026 – DSPM-native standalone trajectory

FALSIFIABLE TEST – H1 2026 through Q1 2027

1+ mid-tier DSPM-native acquired by platform incumbent, AND CNAPP/data-resilience vendor earnings disclose "DSPM-bundled" wins, AND Gartner Market Guide for DSPM reclassifies CNAPP-extensions into primary table, Cyera Series G+ counter-signal.

The DSPM Absorption Chain – H2 2026 test: standalone-DSPM RFP versus DSPM-as-line-item-inside-platform RFP

Not investment advice. See Disclosures.

Pattern Claim 2 – Agentic AI Pulls Enforcement Back to the Data Source

Observation. Veeam's DataAI Command Platform – unveiled at VeeamON on May 13, 2026 with the Securiti AI DSPM core – articulates the architectural thesis cleanly: *"enforces control at the data source, not at the agent, so known and unknown agents cannot access sensitive data if that data is governed at the source"*⁸⁹. Symmetry Systems positions AI agents as first-class principals in the Identity × Data Graph and addresses the structural problem that agents "authenticate via shared service accounts your IAM treats as trusted infrastructure – no session, no MFA, no individual identity to inspect"⁹⁰. Microsoft Purview's new DSPM ships AI observability tracking Agent 365 activities across Microsoft and third-party environments⁹¹. Bedrock Data's ArgusAI module connects the Metadata Lake to AI applications to trace data flow and user interaction⁹². The Palo Alto Networks / CyberArk close cites an 80-to-1 machine-vs-human identity ratio⁹³ – the load-bearing number behind the architectural pivot.

My read. I read this as the most consequential 2026 architectural finding in the entire data-security report. As machine identities scale and agentic AI moves from read-only discovery to read-write action on enterprise data, the only enforcement point that scales is the data store itself – agent runtimes are too many, too fast, and too autonomous to control reliably at the agent layer. DSPM is the category claiming naming-rights to the data-source-enforcement architecture, and the strongest 2026 vendor articulations (Veeam DataAI, Symmetry's Identity × Data Graph, Bedrock's ArgusAI, Microsoft Purview's AI observability) all converge on the same structural primitive. The standalone DSPM-natives that ship this architecture credibly have a durable differentiator against CNAPP-bundled DSPM and against legacy DLP-led data security; the DSPM-natives that ship visibility-only data discovery face displacement pressure from both directions.

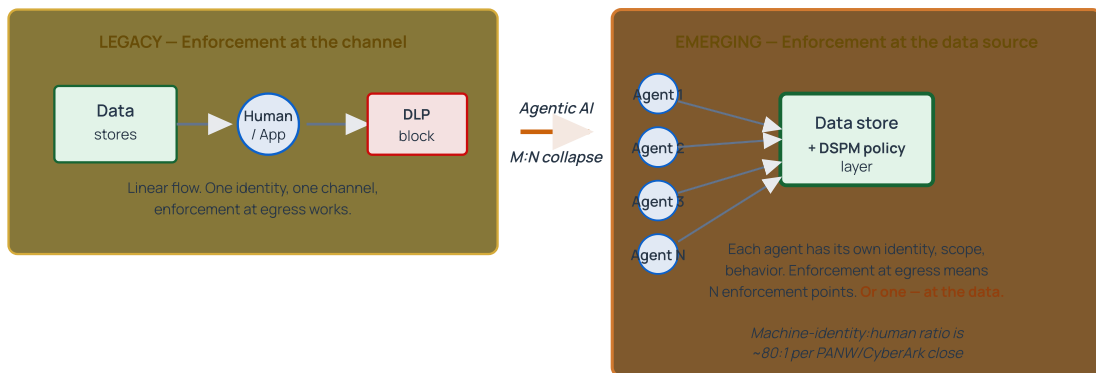
Conditional prediction. *If by Q4 2026 at least three of the eight §3.3 DSPM contenders publicly add to their product pages a headline capability for vector-store inspection, agent-identity governance at the data-store boundary, or machine-identity-aware data access – AND at least two vendors beyond the current architectural articulators (Veeam, Symmetry, Bedrock, Microsoft Purview, Cyberhaven) publish named reference deployments via vendor press releases or named-outlet coverage – AND Gartner / IDC / Forrester publish a new analyst category or sub-category*

around "data-source AI enforcement" – the architectural pivot is real and DSPM (or its successor category) becomes the primary data-side security control through 2027. If Q4 2026 vendor product pages and earnings disclosures continue treating agent-runtime governance as the primary AI-security enforcement primitive – and AI-application-security and AI-runtime-security vendors capture the budget line via funding rounds, customer-win disclosures, and analyst category creation rather than DSPM-natives – the thesis weakens and DSPM stays a discovery-and-classification-led category with enforcement deferred to DLP, IAM, and AI-runtime tools.

Sources. ^{89 90 91 92 93}

Pattern Claim 2: Agentic AI Pulls Enforcement Back to the Data Source

Veeam DataAI Command thesis – "data governed at the source, not at the agent"



My read: DSPM is claiming naming-rights to the new enforcement-at-source architecture.

thesis holds, DSPM becomes load-bearing for AI-era data security; if it doesn't, DSPM stays a discovery-only category and platform vendors absorb the function via CNAPP / data-resilienc

FALSIFIABLE TEST – Q4 2026 vendor pages + analyst categories

Do 3+ of the eight DSPM contenders publicly add vector-store / agent-identity-at-data-store as headline product-page capabilities, AND 2+ vendors publish named reference deployments, AND Gartner/IDC/Forrester publish a new analyst category around "data-source AI enforcement"? If yes: claim confirmed. If AI-runtime captures budget line: shift is slower.

Agentic AI Pulls Enforcement Back to the Data Source – Q4 2026 test: three or more DSPM contenders adding vector-store / agent-identity capabilities as product-page headlines versus AI-runtime governance capturing the budget line

Winners.

- **BigID.** The Gravity-tier vendor with the most segment-specific 2026 positioning across the eight contenders, with the DSPM-page hero "DSPM That Goes Beyond Visibility" explicitly comparative against the visibility-only DSPM cohort. The seven-sub-pillar product taxonomy – DSPM, AISP, Cloud DLP, Insider Risk, Access Governance, Privacy Ops, Data Catalog – gives BigID a structurally broad platform footprint, and the "Agentic Risk Remediation" framing positions BigID

for the data-source-enforcement architectural pivot named in Pattern Claim 2^{47 48}. Series E at \$1B+ post-money (March 2024) with the CEO's near-\$100M-ARR disclosure⁴⁹ anchors the funding-side credibility. The Winners label is opinion-labeled: I read BigID's position as winning the *broadest-coverage* default slot in enterprise data-governance-led DSPM evaluations, particularly where the buyer already has BigID for data-discovery or privacy-ops and the DSPM pillar is an extension purchase rather than a greenfield decision.

- **Cyera.** Series F at \$9B post-money in January 2026 with Blackstone joining the cap table on a triple-up from \$3B in fourteen months — the single largest valuation-acceleration on record in the data-security-private cohort⁵⁵. The DSPM-page architecture (Modern DSPM hero, three pillar tiles around deployment / classification / signal-to-noise) plus the AI Guardian and AI-SPM extensions^{50 54} position Cyera at the intersection of standalone-DSPM-leadership and the AI-training-pipeline coverage play (Play 3) that is the standalone-DSPM survival path. The Winners label here reflects funding depth, named-outlet sourcing density, and structural positioning at the intersection of the chapter's two Pattern Claims; it does not call a long-term outcome against the absorption gravity Pattern Claim 1 documents.
- **Microsoft Purview Data Security Posture Management.** Distribution moat via Microsoft 365 E5 / E5 Compliance and Microsoft Purview Suite is structural. The new DSPM surface (third-party SaaS and IaaS via Sentinel data-lake integrations; partner connectors including Varonis, Cyera, BigID, OneTrust; dedicated AI observability tracking Agent 365 activities)⁴⁶ gives Microsoft the broadest *cross-cloud-and-AI-agent* DSPM positioning of any vendor in the chapter when scoped to Microsoft-tenant data. The Winners label is opinion-labeled: I read Microsoft's position as winning the *default-choice* slot in Microsoft-standard enterprises where Copilot and Agent 365 are in scope, not winning every DSPM deal on cloud-storage-native breadth against Cyera or BigID.
- **Symmetry Systems.** The cleanest architectural test of the chapter's Action Posture Y-axis — five named deployment options including air-gapped, the Identity × Data Graph as structural primitive, DataEnforce for automated remediation, and the sharpest AI-agent-as-first-class-principal positioning in the eight-vendor list^{61 62}. Funding-staleness is the watch signal: the July 2023 \$17.7M inside round⁶⁶ is ~34 months out and fails the chapter's freshness window. A fresh round announcement in H2 2026 — or a named-outlet platform-acquisition signal — would resolve the watch in either direction. The Watch

placement reflects funding-side visibility, not product-side positioning, which is current and on-brand.

- **Bedrock Data (formerly Bedrock Security)**. Series A at \$25M led by Greylock in November 2025, brand transition from Bedrock Security to Bedrock Data in mid-2026 ⁸¹. Product-page architecture (Metadata Lake, Serverless Outpost, ArgusAI for RAG-pipeline coverage, Zero Data Access architecture) ⁶⁷ is structurally aligned with the data-source-enforcement architectural pivot of Pattern Claim 2, but the deeper architectural disclosure (Metadata Lake schema, ArgusAI integration depth with the named integration targets) is not yet in publicly-citable form. Watch signal: product-page maturation (named integration-depth claims, named reference customers, scope-of-coverage documents for the Metadata Lake), Series B announcement cadence, and analyst inclusion in the next Gartner DSPM Market Guide refresh.
- **Concentric AI**. Wildcard descriptive treatment per chapter discipline. Series B at \$45M (October 2024) with Top Tier Capital Partners and HarbourVest ⁶⁵; Gartner-recognized DSPM vendor; usage-based pricing model publicly disclosed (the only vendor of the eight to publish its pricing model). Watch signal: 2026 funding-event cadence — the October 2024 round sits at the edge of the positioning-staleness window; any 2026-2027 round announcement (or its absence) is the load-bearing watch indicator.

No standalone DSPM contender in The Contenders earns a Losers label in this chapter. A vendor reaches this section only when a cited public event — layoff, missed quarter, down-round, named executive departure, or customer-churn disclosure — is specific to that vendor's DSPM business, not a parent-company-wide action. As of May 2026, no contender meets that bar in the public record reviewed for this chapter. Two acquired vendors warrant a closing note. **Normalyze** (now Proofpoint DSPM) was absorbed by Proofpoint in October-November 2024 ⁹⁴ — this is a category-structure absorption, treated in Pattern Claim 1 as evidence of the DSPM Absorption Chain, not as a vendor-specific casualty ⁹⁴. The Normalyze product line continues to ship inside Proofpoint, the Normalyze domain redirects to the Proofpoint integration page, and the cumulative ~\$26.6M Normalyze funding base translates into a Proofpoint-portfolio asset rather than a closing event. **Securiti AI** was acquired by Veeam for USD 1.725B (close December 11, 2025) ⁹⁵ — the largest DSPM-pure-play exit on record; CEO Rehan Jalil joined Veeam as President of Security and AI; the Securiti DSPM platform is now the core of Veeam's DataAI Command Platform announced at VeeamON on May 13, 2026. Both transactions are absorption events at favorable terms, not distress events, and are framed as Pattern Claim 1 anchors rather than as the sentinel kind of casualty signal War Chests &

Casualties reserves for cited distress ⁹⁵. Quarterly refreshes will populate this section if DSPM-specific distress signals emerge.

3.7 The Campaign Ahead

Five watchlist items for H2 2026 and into 2027.

1. **CNAPP-bundled DSPM versus standalone-DSPM RFP shift.** Signal to monitor: enterprise DSPM RFP language in named-outlet vendor-win disclosures, Gartner Market Guide refresh, and Forrester Wave / IDC MarketScape DSPM cycles. Threshold for re-assessment: two or more 2026 Q3-Q4 enterprise DSPM wins disclosed as "CNAPP platform that includes DSPM" platform-replace deals against standalone DSPM-natives → Pattern Claim 1 first branch realized. Primary source: vendor earnings transcripts (Wiz / Google Cloud, CrowdStrike, Palo Alto Networks), named-outlet customer-win coverage, Gartner Market Guide for DSPM next refresh.
1. **DSPM-pure-play mid-tier acquisition event.** Signal: any platform-incumbent announcement of an acquisition of Sentra, BigID, Symmetry Systems, Concentric AI, or Bedrock Data, OR any named-outlet rumor of one matching the Securiti AI / Normalyze cadence (named-outlet sourcing from Bloomberg, Reuters, Fortune, TechCrunch, Calcalist). Threshold: one mid-tier DSPM-native acquired by a CNAPP, data-resilience, or identity-led platform → Pattern Claim 1 second branch realized; absorption thesis is structurally durable through 2027. Primary source: BusinessWire, Bloomberg, Reuters, TechCrunch, Calcalist.
1. **Vector-store and agent-identity-at-data-store as headline product capabilities.** Signal: DSPM vendor product pages publicly adding vector-database posture, embedding-index inspection, or agent-identity governance at the data-store boundary as headline capabilities rather than as feature checkboxes under "AI runtime." Threshold for re-assessment: three or more §3.3 DSPM contenders publishing these as product-page hero claims (snapshot-comparable) AND a second vendor beyond the current architectural articulators (Veeam, Symmetry, Bedrock Data, Microsoft Purview) ships data-source-enforcement primitives with named reference deployments → Pattern Claim 2 first branch realized. Primary source: named-outlet customer-win coverage, vendor product-page architecture updates, analyst category coverage (Gartner Market Guide for DSPM; Forrester DSPM Wave).
1. **Cyera valuation-and-platform-extension cadence.** Signal: Cyera's next funding event, any Series G or larger announcement, named-outlet ARR disclosure, and

the cadence of Cyera platform extensions (AI Guardian, AI-SPM, DLP overlay) into named-outlet enterprise wins. Threshold for re-assessment: ARR disclosure crossing \$200M with sustained 80%+ growth OR a fresh Series G mega-round, AND named-outlet enterprise reference wins as DSPM-platform-replace deals against legacy DSPM and CNAPP-bundled DSPM → Cyera holds standalone-DSPM-leadership credibility through 2027 and Pattern Claim 1's counterweight strengthens. Acquisition signal or a flat-or-down round would trigger a Pattern Claim 1 re-assessment in the opposite direction. Primary source: Fortune, TechCrunch, Calcalist, BusinessWire, Cyera press page.

1. **Microsoft Purview new DSPM platform-displacement cadence.** Signal: documented Microsoft Purview DSPM deployments displacing DSPM-natives in mid-market and enterprise accounts, particularly in Microsoft-standard environments where Copilot and Agent 365 are in scope; partner-integration depth into Varonis, Cyera, BigID, and OneTrust as evidenced by joint case studies; Microsoft Sentinel data-lake adoption as the third-party SaaS / IaaS coverage substrate. Threshold for re-assessment: Microsoft Purview DSPM cited as the displacement vendor in named-outlet enterprise reference wins by H1 2027, particularly against Cyera or BigID → distribution-moat thesis holds across DSPM as it holds across DLP and IRM. Primary source: Microsoft FastTrack case studies, Microsoft Mechanics videos, Gartner Market Guide for DSPM next refresh, named-outlet enterprise customer-win coverage.

Keep reading

Three companion artefacts. Same research, three formats.

NEXT CHAPTER

Convergence

Where IRM, DLP, and DSPM collapse into a single buying motion.

COMPANION

Pre-Call Briefing Pack

Three Pattern Claims and the falsifiable tests behind each.

COMPANION

Report Digest

14-page chapter-by-chapter synthesis of all four fronts.

[Read the methodology](#) →

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Disclosures

DISCLOSURE

Disclosure: The author is Head of Product (Fractional) at AXIA, which competes in the Data Loss Prevention segment, adjacent to but not within Data Security Posture Management. This chapter uses only publicly available material and reflects the author's personal view, not AXIA's position.

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