UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
WASHINGTON, D.C. 20549

FORM 8-K

CURRENT REPORT
Pursuant to Section 13 or 15(d)
of the Securities Exchange Act of 1934

Date of Report (Date of earliest event reported): November 12, 2026

Smartbird, Inc.

(Exact name of registrant as specified in its charter)

Delaware	**001-40963**	**47-3999983**
(State or other jurisdiction of incorporation)	**(Commission File Number)**	**(IRS Employer Identification No.)**

425 Page Mill Rd.
Suite 200
Palo Alto, CA94306
(Address of principal executive offices, including zip code)

(628) 225-4848
(Registrant's telephone number, including area code)

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions (see General Instructions A.2. below):

☐ Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
☐ Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
☐ Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
☐ Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Securities registered pursuant to Section 12(b) of the Act:

Title of each class	**Trading Symbol(s)**	**Name of each exchange on which registered**
Class A common stock, $0.0001 par value	**BIRD**	**The Nasdaq Stock Market LLC**

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (§230.405 of this chapter) or Rule 12b-2 of the Securities Exchange Act of 1934 (§240.12b-2 of this chapter).

Emerging growth company ☒

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act. ☐

Item 8.01 Other Events.

On November 13, 2026, Smartbird, Inc. (the "Company") issued a letter to shareholders from Nadia Carlsten, the Chief Executive Officer of the Company, discussing certain business updates of the Company. A copy of the letter to shareholders is filed as Exhibit 99.1 to this Current Report on Form 8-K and is incorporated herein by reference.

On November 12, 2026, the Company issued a press release, announcing that it secured data center capacity to accelerate deployment of AI infrastructure. A copy of the press release is filed as Exhibit 99.2 to this Current Report on Form 8-K and is incorporated herein by reference.

Item 9.01 Financial Statements and Exhibits

(d) Exhibits.

Exhibit	Description
99.1	Letter to Shareholders, dated November 13, 2026
99.2	Data Center Capacity Press Release, dated November 12, 2026
104	Cover Page Interactive Data File (embedded within the Inline XBRL document)

SIGNATURES

Pursuant to the requirements of the Securities Exchange Act of 1934, as amended, the Registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

Smartbird, Inc.

Dated: November 13, 2026

By: /s/ Nadia Carlsten
Nadia Carlsten
Chief Executive Officer

November 13, 2026

Letter to Shareholders from Smartbird CEO Nadia Carlsten

PALO ALTO, Calif., November 13, 2026 (GLOBE NEWSWIRE) -- Smartbird, Inc. (NASDAQ: BIRD), an AI infrastructure provider, has issued the following letter from Nadia Carlsten, CEO:

In August, I shared our vision for Smartbird. Three months later, we are rapidly moving from vision to execution.

We have established key technology relationships, secured data center capacity, and advanced commercial opportunities with prospective customers. Each represents an important milestone in its own right. Together, they are laying the foundation for Smartbird to deliver AI infrastructure at scale.

Building with the Best

In my first letter, I shared several principles guiding how we build Smartbird. One of them was *Build with the best*. This principle is particularly relevant today as we establish the relationships needed to deliver for our customers.

AI infrastructure is increasingly complex, and no single company has all the answers. Our approach is to combine the expertise of leading technology and infrastructure providers with our own capabilities to deliver complete solutions to our customers. This allows us to move faster, adapt as technology evolves, and focus our resources where we can create the most value.

On that front, we recently announced two important relationships:

Our collaboration with Supermicro gives us access to a broad portfolio of computing platforms and rack-scale systems, providing flexibility across processor architectures, system configurations, and deployment sizes. This flexibility is increasingly important as customer requirements diversify and new technologies enter the market.

Additionally, our partnership with WEKA brings advanced data and memory infrastructure to our managed AI offerings. McKinsey expects inference will supplant training as the dominant workload in AI data centers by 2030, while advancements in AI agents continue to accelerate. And as inference and agentic AI workloads become more demanding, efficient data access and movement are increasingly critical to system performance and cost. WEKA's technology helps us address these requirements as part of an integrated solution.

These relationships mark the beginning of a broader technology partner network, bringing together proven technologies and specialized expertise, with Smartbird taking responsibility for designing, integrating, deploying, and operating the complete infrastructure stack.

Commercial Progress

Through my conversations with prospective customers, one observation stands out: customers are becoming more sophisticated in how they evaluate AI infrastructure. Their focus is shifting beyond GPU availability and headline pricing to the performance and economics of the entire system.

Simply, buyers want to understand how infrastructure will support their workloads, how quickly it can be deployed, and who will be responsible for operating it securely. They want a partner who can translate storage, networking, power and cooling, and software requirements into an integrated system that meets their performance, deployment, and operating-cost objectives.

My conversations at The Wall Street Journal's recent Tech Live event reinforced this broader shift: attention is moving beyond the promise of AI toward the practical challenges of putting it to work. For us, this reinforces the growing importance of technical expertise and end-to-end accountability. Customers are not simply purchasing computing capacity; they are making long-term infrastructure decisions that will shape their ability to deploy AI and make it useful.

We are seeing the value of our focus on complete infrastructure solutions. Our commercial pipeline continues to develop across opportunities of varying sizes and requirements. Several discussions have advanced into detailed technical and commercial planning, including system configurations, deployment locations, financing structures, and delivery schedules. We are encouraged by the scale and maturity of these opportunities and remain focused on converting them into customer commitments and revenue.

Securing Data Center Capacity

As commercial discussions advance, securing suitable data center capacity becomes a prerequisite for converting opportunities into customer commitments. AI-ready facilities with the required power, cooling, and connectivity are increasingly difficult to secure globally, and availability directly affects deployment timelines. Securing capacity gives customers greater confidence in our ability to meet their requirements and deliver on schedule, helping move commercial opportunities toward execution.

Our agreement with Expedient secures U.S. data center capacity to support opportunities in our pipeline. Expedient is an established data center operator with experience supporting enterprise infrastructure, providing the facilities and operational environment needed for demanding AI deployments. The agreement provides a concrete foundation for deployment planning and represents an important step toward delivering infrastructure for our customers.

We intend to continue to secure capacity selectively, aligned with specific customer opportunities and their requirements. This allows us to advance commercial opportunities while managing capital commitments and execution risk.

Building in a Changing Market

The AI infrastructure market continues to attract extraordinary investment, driven by growing demand for computing capacity. At the same time, investors are paying closer attention to how projects are financed, when they will generate revenue, and whether returns will justify the capital committed.

I believe this scrutiny is a natural and necessary evolution of the market. The long-term opportunity remains substantial, but strong demand alone does not guarantee attractive returns. In a capital-intensive industry with rapidly evolving technology, success depends on carefully managing financing costs, deployment timelines, operating expenses, and equipment lifecycles. As the industry matures, the ability to manage these tradeoffs while delivering reliably will become a critical measure of success.

For Smartbird, this reinforces our approach to building the business. We intend to align major purchases and financing commitments with customer contracts, rather than invest heavily in speculative capacity. We also recognize that the right commercial and financing structure will differ by customer. Some may prefer to own their infrastructure while relying on Smartbird to design and operate it; others may favor a fully managed capacity model. This flexibility allows us to pursue opportunities based on their underlying economics while managing our capital requirements.

Looking Ahead

Our priorities for the coming quarters are clear: convert commercial opportunities into customer commitments, execute our initial deployments, and build the operational capabilities needed to support sustainable growth. We cannot control the broader financing environment, but we can control how we evaluate opportunities, commit resources, and execute. The milestones we have achieved give me confidence in our direction, and I look forward to sharing what comes next.

Sincerely,
Nadia Carlsten
CEO
Smartbird

Access the CEO letter on our website or as a PDF

Investor Contact:
ir@smartbird.ai

Media Contact:
Press@smartbird.ai

November 12, 2026

Smartbird Secures Data Center Capacity to Accelerate Deployment of AI Infrastructure

Multi-year colocation agreement with Expedient secures nearly 4 megawatts of data center capacity to support planned infrastructure deployments in the first half of 2027

PALO ALTO, Calif. – Nov. 12, 2026 – Smartbird, Inc. (NASDAQ: BIRD), the AI infrastructure company, today announced that it has signed a multi-year colocation agreement to secure more than 3.7 megawatts (MW) of IT capacity at a U.S.-based data center owned and operated by Expedient, a data center and cloud service provider delivering intelligent infrastructure for the AI era. The available capacity is intended to support the deployment of dedicated AI infrastructure targeted for the first half of 2027.

Securing this capacity marks another important milestone in Smartbird's progress toward delivering dedicated, fully managed AI infrastructure to enterprise customers. The colocation agreement represents a concrete step toward establishing the physical infrastructure required for customer deployments. The capacity will support opportunities within Smartbird's active customer pipeline as the company continues to develop solutions tailored to enterprise workloads.

This announcement follows Smartbird's recent collaborations with WEKA and Supermicro, reflecting continued progress in assembling the technology stack, and operational capabilities required to support enterprise AI deployments.

As enterprises move AI applications from experimentation into production, access to suitable data center infrastructure has become an increasingly important requirement. Power availability, cooling capabilities, physical space, and deployment timelines can create significant challenges for organizations seeking to operate high-performance AI systems at scale.

Smartbird addresses these challenges by bringing together the infrastructure, technology, and operational capabilities required for each customer.

"We're moving from building the foundation of Smartbird to putting the pieces in place for customer deployments," said Nadia Carlsten, Ph.D., president and CEO of Smartbird. "Access to power and AI-ready data center capacity is one of the most important requirements for delivering infrastructure at scale. Securing capacity through this agreement with Expedient is a tangible step forward in our execution plans, strengthening our ability to serve customers and advancing our progress toward planned 2027 deployments."

The data center facility will support Smartbird's model of delivering dedicated AI infrastructure, providing customers with the performance, control, and security required for their workloads. It is able to accommodate high-density AI computing systems, including liquid-cooled racks, supporting a range of enterprise AI workloads and hardware configurations.

Expedient’s network of data centers provides points of delivery in strategic locations across the U.S. for cloud, colocation, and AI in facilities with 24x7x365 support. Expedient operates data centers in multiple U.S. cities and regions, including Boston, Baltimore, Cleveland, Columbus, Indianapolis, Pittsburgh, Memphis, Phoenix, Denver, Milwaukee, San Jose, Ashburn, and Chicago.

“The next phase of enterprise AI will be won on power, cooling, and the people who keep it running,” said Bryan Smith, CEO of Expedient. “Our role is to provide organizations with a ready place to run AI at scale, backed by U.S.-based engineers 24/7. We’re proud to support Smartbird as it prepares for its planned 2027 deployments.”

About Smartbird

Smartbird, Inc. (NASDAQ: BIRD) is an AI infrastructure company focused on making enterprise AI deployment simpler, more secure, and more cost-effective. Smartbird designs, deploys, and operates dedicated, fully managed AI infrastructure tailored to customers’ workloads and business requirements. With flexible deployment and ownership models, Smartbird enables enterprises, governments, and research organizations to run AI at production scale while maintaining control over their infrastructure, data, and costs. Learn more at www.smartbird.ai.

About Expedient

Expedient is a cloud service provider that guides organizations through every era of technology change. For 25 years, organizations have trusted Expedient to act as an extension of their team, helping them stabilize, optimize, and modernize without the complexity of doing it alone. Expedient unifies cloud, data, and AI into one seamless managed service, so teams can focus on what drives the business forward. Expedient is the first Nutanix Premier Service Provider, a two-time Nutanix Service Provider Partner of the Year, Americas, and one of 14 Broadcom Pinnacle tier VMware Cloud Service Providers in the U.S. Every solution is backed by a 100% SLA with 24/7 access to our U.S.-based engineers. Learn more at expedient.com.

Forward-Looking Statements

This press release contains forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995, including statements regarding Smartbird's strategy, anticipated partnerships, expected data center and equipment availability and cluster deployments, anticipated customers, capital resources, and market opportunity. These statements are subject to risks and uncertainties that could cause actual results to differ materially from those expressed or implied. Discussion of these and other factors that could cause our financial results and performance to differ materially from any results or performance anticipated, expressed, or implied by these forward-looking statements is included in the filings we make with the SEC, including our most recent Quarterly Report on Form 10-Q and our Annual Report on Form 10-K for the year ended December 31, 2025, and other reports we may file with the SEC from time to time. These forward-looking statements speak only as of the date of this press release, and we undertake no obligation to update them except as required by law.

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