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Luminary Strategies Expands Prosperous Infrastructure Platform with Pre-Seed Advisement of V-Wire

Whole-of-grid architecture company builds on ERCOT's PCLR framework to make private firming attributable and financeable while keeping generation, storage, and flexible load visible and useful to the Texas grid.

WASHINGTON, D.C. & AUSTIN, TEXAS, SEPT. 15, 2026—Luminary Strategies LLC today announced its pre-seed advisement of V-Wire, a whole-of-grid architecture company founded by Jesse Gossett. V-Wire joins Luminary's Prosperous Infrastructure platform to build market and operating architecture that makes privately financed power resources useful to both the loads that support them and the wider ERCOT system.

The engagement extends a market architecture already led by Luminary founder **Arushi Sharma Frank**. In 2025 and 2026, Sharma Frank [originated the PCLR architecture](#) and galvanized the stakeholder coalition that brought it into the ERCOT market, creating a pathway for large loads to energize before completion of long-lead transmission upgrades by accepting real-time dispatch obligations and privately managing part of their delivery risk. Her technical paper, [PCLR Builds the Moat for AI Loads](#), documents that architecture and the broader principle: the grid provides the floor; the private sector firms the rest.

"Prosperous infrastructure is infrastructure that compounds. The point is to build infrastructure whose private value grows because it also makes the whole grid stronger. PCLR opened that door for large loads. V-Wire is building the next layer so the batteries, generators, and flexible loads financed to support those obligations can remain visible, useful, and financeable as grid resources."

— Arushi Sharma Frank, Founder, Luminary Strategies

From PCLR to a Whole-of-Grid Architecture

PCLR establishes a five-minute, grid-facing operating obligation for provisional large loads. V-Wire's first market deployment, Front-of-the-Meter (FTM) Netting, addresses the next problem: the **attributability gap** between a PCLR and the separately metered Generation Resource or Energy Storage Resource built or contracted to mitigate its congestion exposure. Under the proposed construct, the paired resources remain separately registered and visible to ERCOT; the QSE manages the PCLR operating envelope through telemetry, and every temporary MW of load protection must be backed one-for-one by qualifying paired Resource capability.

FTM Netting is designed to keep privately financed firming **inside the ERCOT market**, with those Resources separately metered, visible to SCED, and available to the wider system.

V-Wire's First Market Deployment: Attribution That Makes Flexibility Financeable

- **Bounded native load flexibility.** FTM Netting can divide congestion responsibility between a paired Resource and a measurable residual amount of native load flexibility, turning an open-ended curtailment exposure into something that can be engineered, contracted, insured, and financed.
- **More Resources remain in SCED.** Large Loads gain a commercial reason to finance co-located batteries and generation as separately metered ERCOT Resources rather than putting the entire firming solution behind the meter.
- **One-for-one reliability substitution.** A MW of PCLR curtailment temporarily removed from the dispatchable range must be backed by a MW of qualifying paired Resource capability; if that capability disappears, the load flexibility automatically returns.
- **Scarcity capability returns to ERCOT.** During system scarcity, the temporary protection yields and the PCLR's native curtailment capability returns while the paired Resource remains independently available to ERCOT.
- **Private capital can finance the reliability slice a customer actually needs.** The same architecture can support batteries or dispatchable generation with a bankable customer revenue layer while preserving broader market participation for the remainder of the asset.

"V-Wire is building for the whole of the grid. FTM Netting is our first deployment because it solves the attribution gap directly: the load can buy the reliability slice it needs while the paired Resource remains visible to ERCOT and useful to the wider market."

— Jesse Gossett, Founder, V-Wire

Prosperous Infrastructure: Infrastructure That Compounds

V-Wire expands Luminary's **Prosperous Infrastructure** platform: technical, regulatory, commercial, financial, software, hardware, and operating architectures designed so private returns and public value reinforce each other through stronger infrastructure. The platform documents and extends market architectures originated or orchestrated by Luminary and the ventures it advises, together with the stakeholder coalitions Luminary has galvanized to bring them into practice.

The premise is simple: technology infrastructure should create private returns by increasing the capability, resilience, and prosperity of the public systems and communities around it. In power, that means solutions that respect grid physics, preserve reliability authority, and create more useful infrastructure for all consumers.

In a September 10 [Rebellionaire conversation](#), Sharma Frank explained the principle directly: "The word prosperous belongs before infrastructure in people's minds." The conversation traces the same logic across distributed batteries, PCLR, grid-aware compute, and V-Wire: "Everything is grid aware. Everything has to be customer aware."

Next: ERCOT Large Load Working Group

On September 17, 2026, V-Wire founder Jesse Gossett will present the [FTM Netting](#) construct at [ERCOT's Large Load Working Group](#). The proposed architecture is designed around a narrow operational principle: the pair remains separate in ERCOT systems, while QSE-managed telemetry and ex-post verification create a temporary operating envelope that recognizes verified paired-resource capability without asking SCED to enforce a private contract path.

Why Luminary Backs the Architecture

Luminary is an infrastructure venture platform that builds technical policy while backing companies developing the next generation of power infrastructure. The firm originates market architecture and works alongside founders, utilities, grid operators, investors, and public institutions to co-create the technical, commercial, regulatory, and financial foundations that allow new technologies to become infrastructure.

PCLR established a new way for large loads to accept and privately manage delivery risk. FTM Netting can make that architecture stronger by giving privately financed generation and storage an attributable role in carrying that risk while preserving ERCOT visibility and reliability authority. The result is a larger investable market for load flexibility, batteries, generation, grid controls, and compute orchestration, with private investment reinforcing the public grid rather than bypassing it.

About Luminary Strategies

Luminary Strategies LLC is an infrastructure venture platform that builds technical policy while backing companies developing the next generation of power infrastructure. The firm works alongside entrepreneurs and builds their partnerships with utilities, grid operators, investors, and public institutions to co-create the technical, commercial, regulatory, and financial foundations of critical infrastructure. Luminary believes that prosperous infrastructure is infrastructure that compounds: well-designed markets attract capital; capital accelerates innovation; innovation strengthens infrastructure; and stronger infrastructure creates new opportunities for investment, capability, and economic growth.

About Arushi Sharma Frank

Arushi Sharma Frank is the Founder of Luminary Strategies and a Category Creator and Tech and Grids Architect specializing in [first-principles grid-to-consumer architecture](#). She originated the PCLR architecture and galvanized the stakeholder coalition that brought it into the ERCOT market. Her earlier category-creation work includes Aggregated [Distributed Energy Resource \(ADER\)](#) dispatch in ERCOT, [utility-scale battery](#) market-entry architecture, and [virtual power plant](#) programs. Earlier in her career, she [led Tesla's strategic market entry](#) for its first U.S. wholesale and retail energy businesses, built Exelon-Constellation's multi-market operator compliance program, and directed commodities, energy and environmental policy at the American Gas Association and Electric Power Supply Association. She is an Adjunct Lecturer at Johns Hopkins SAIS, a Senior Associate (Non-resident) at CSIS, an Advisory Board Member of C3 Solutions, an Executive Council Member of the University of Texas Kay Bailey Hutchison Energy Center, and a former appointee to the CFTC Energy and Environmental Markets Advisory Council.

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PCLR Technical Paper: [PCLR Builds the Moat for AI Loads](#)

Recent Podcasts: [Rebellionaire - Rewriting AI Power Policy with Arushi Sharma Frank](#) [Can Data Centers Earn Their Power?](#)

Luminary: [Luminary Strategies](#) [Prosperous Infra Platform](#)