SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

SCHEDULE 13G

UNDER THE SECURITIES EXCHANGE ACT OF 1934

(Amendment No. 2)*

KODIAK AI, INC.

(Name of Issuer)

Common Stock, par value $0.0001 per share

(Title of Class of Securities)

(CUSIP Number)

09/30/2026

(Date of Event Which Requires Filing of this Statement)

Check the appropriate box to designate the rule pursuant to which this Schedule is filed:

- ☐ Rule 13d-1(b)
- ☑ Rule 13d-1(c)
- ☐ Rule 13d-1(d)

SCHEDULE 13G

CUSIP No.

1	Names of Reporting Persons SIP Global Tech Fund I, L.P.
2	Check the appropriate box if a member of a Group (see instructions) ☐ (a) ☑ (b)
3	Sec Use Only
4	Citizenship or Place of Organization CAYMAN ISLANDS

Number of Shares Beneficially Owned by Each Reporting Person With:	5	Sole Voting Power 0.00
	6	Shared Voting Power 2,990,929.00
	7	Sole Dispositive Power 0.00
	8	Shared Dispositive Power 2,990,929.00
9		Aggregate Amount Beneficially Owned by Each Reporting Person 2,990,929.00
10		Check box if the aggregate amount in row (9) excludes certain shares (See Instructions) ☐
11		Percent of class represented by amount in row (9) 1.5 %
12		Type of Reporting Person (See Instructions) PN

SCHEDULE 13G

CUSIP No.

1		Names of Reporting Persons SIP Global Tech Fund I, Inc.
2		Check the appropriate box if a member of a Group (see instructions) ☐ (a) ☑ (b)
3		Sec Use Only
4		Citizenship or Place of Organization CAYMAN ISLANDS
Number of Shares Beneficially Owned by Each Reporting Person With:	5	Sole Voting Power 0.00
	6	Shared Voting Power 2,990,929.00
	7	Sole Dispositive Power 0.00
	8	Shared Dispositive Power 2,990,929.00
9		Aggregate Amount Beneficially Owned by Each Reporting Person 2,990,929.00
10		Check box if the aggregate amount in row (9) excludes certain shares (See Instructions) ☐

11	Percent of class represented by amount in row (9)	1.5 %
12	Type of Reporting Person (See Instructions)	CO

SCHEDULE 13G

CUSIP No.

1	Names of Reporting Persons	SIP Global Tech Opportunity LLC
2	Check the appropriate box if a member of a Group (see instructions)	☐ (a) ☑ (b)
3	Sec Use Only	
4	Citizenship or Place of Organization	DELAWARE
Number of Shares Beneficially Owned by Each Reporting Person With:	5 Sole Voting Power	0.00
	6 Shared Voting Power	1,003,888.00
	7 Sole Dispositive Power	0.00
	8 Shared Dispositive Power	1,003,888.00
9	Aggregate Amount Beneficially Owned by Each Reporting Person	1,003,888.00
10	Check box if the aggregate amount in row (9) excludes certain shares (See Instructions)	☐
11	Percent of class represented by amount in row (9)	0.5 %
12	Type of Reporting Person (See Instructions)	OO

SCHEDULE 13G

CUSIP No.

1	Names of Reporting Persons	SIP Global Tech Opportunity 3 LLC
2	Check the appropriate box if a member of a Group (see instructions)	

☐ (a)
☑ (b)

3 Sec Use Only

4 Citizenship or Place of Organization

DELAWARE

Number of Shares Beneficially Owned by Each Reporting Person With:

5 Sole Voting Power

0.00

6 Shared Voting Power

232,710.00

7 Sole Dispositive Power

0.00

8 Shared Dispositive Power

232,710.00

9 Aggregate Amount Beneficially Owned by Each Reporting Person

232,710.00

10 Check box if the aggregate amount in row (9) excludes certain shares (See Instructions)

☐

11 Percent of class represented by amount in row (9)

0.1 %

12 Type of Reporting Person (See Instructions)

OO

SCHEDULE 13G

CUSIP No.

1 Names of Reporting Persons

SIP Global Tech Opportunity 4 LLC

2 Check the appropriate box if a member of a Group (see instructions)

☐ (a)
☑ (b)

3 Sec Use Only

4 Citizenship or Place of Organization

DELAWARE

Number of Shares Beneficially Owned by Each Reporting Person With:

5 Sole Voting Power

0.00

6 Shared Voting Power

10,293.00

7 Sole Dispositive Power

0.00

8 Shared Dispositive Power

10,293.00

Aggregate Amount Beneficially Owned by Each Reporting Person

9

10,293.00

Check box if the aggregate amount in row (9) excludes certain shares (See Instructions)

10

☐

Percent of class represented by amount in row (9)

11

0.0 %

Type of Reporting Person (See Instructions)

12

OO

SCHEDULE 13G

CUSIP No.

Names of Reporting Persons

1

SIP Global Opportunity Manager LLC

Check the appropriate box if a member of a Group (see instructions)

2

☐ (a)
☑ (b)

3 Sec Use Only

Citizenship or Place of Organization

4

DELAWARE

Number of Shares Beneficially Owned by Each Reporting Person With:

5 Sole Voting Power

0.00

6 Shared Voting Power

1,246,891.00

7 Sole Dispositive Power

0.00

8 Shared Dispositive Power

1,246,891.00

Aggregate Amount Beneficially Owned by Each Reporting Person

9

1,246,891.00

Check box if the aggregate amount in row (9) excludes certain shares (See Instructions)

10

☐

Percent of class represented by amount in row (9)

11

0.6 %

Type of Reporting Person (See Instructions)

12

OO

SCHEDULE 13G

CUSIP No.

1	Names of Reporting Persons Shigeki Saitoh	
2	Check the appropriate box if a member of a Group (see instructions) ☐ (a) ☑ (b)	
3	Sec Use Only	
4	Citizenship or Place of Organization JAPAN	
Number of Shares Beneficially Owned by Each Reporting Person With:	5	Sole Voting Power 0.00
	6	Shared Voting Power 2,990,929.00
	7	Sole Dispositive Power 0.00
	8	Shared Dispositive Power 2,990,929.00
9	Aggregate Amount Beneficially Owned by Each Reporting Person 2,990,929.00	
10	Check box if the aggregate amount in row (9) excludes certain shares (See Instructions) ☐	
11	Percent of class represented by amount in row (9) 1.5 %	
12	Type of Reporting Person (See Instructions) IN	

SCHEDULE 13G

CUSIP No.

1	Names of Reporting Persons Matthew Salloway	
2	Check the appropriate box if a member of a Group (see instructions) ☐ (a) ☑ (b)	
3	Sec Use Only	
4	Citizenship or Place of Organization UNITED STATES	
Number of Shares Beneficially Owned by Each	5	Sole Voting Power 0.00
	6	Shared Voting Power

Reporting Person With:		1,246,891.00
	7	Sole Dispositive Power 0.00
	8	Shared Dispositive Power 1,246,891.00
9		Aggregate Amount Beneficially Owned by Each Reporting Person 1,246,891.00
10		Check box if the aggregate amount in row (9) excludes certain shares (See Instructions) ☐
11		Percent of class represented by amount in row (9) 0.6 %
12		Type of Reporting Person (See Instructions) IN

SCHEDULE 13G

CUSIP No.

1		Names of Reporting Persons Jeffrey Smith
2		Check the appropriate box if a member of a Group (see instructions) ☐ (a) ☑ (b)
3		Sec Use Only
4		Citizenship or Place of Organization UNITED STATES
Number of Shares Beneficially Owned by Each Reporting Person With:	5	Sole Voting Power 0.00
	6	Shared Voting Power 2,990,929.00
	7	Sole Dispositive Power 0.00
	8	Shared Dispositive Power 2,990,929.00
9		Aggregate Amount Beneficially Owned by Each Reporting Person 2,990,929.00
10		Check box if the aggregate amount in row (9) excludes certain shares (See Instructions) ☐
11		Percent of class represented by amount in row (9) 1.5 %
12		Type of Reporting Person (See Instructions)

IN

SCHEDULE 13G

CUSIP No.

1	Names of Reporting Persons Justin Turkat	
2	Check the appropriate box if a member of a Group (see instructions) ☐ (a) ☑ (b)	
3	Sec Use Only	
4	Citizenship or Place of Organization UNITED STATES	
Number of Shares Beneficially Owned by Each Reporting Person With:	5	Sole Voting Power 0.00
	6	Shared Voting Power 4,237,820.00
	7	Sole Dispositive Power 0.00
	8	Shared Dispositive Power 4,237,820.00
9	Aggregate Amount Beneficially Owned by Each Reporting Person 4,237,820.00	
10	Check box if the aggregate amount in row (9) excludes certain shares (See Instructions) ☐	
11	Percent of class represented by amount in row (9) 2.1 %	
12	Type of Reporting Person (See Instructions) IN	

SCHEDULE 13G

Item 1.

(a) Name of issuer:

KODIAK AI, INC.

(b) Address of issuer's principal executive offices:

1049 Terra Bella Avenue, Mountain View, CA, 94043.

Item 2.

(a) Name of person filing:

The names of the persons filing this report (collectively, the "Reporting Persons") are: SIP Global Tech Fund I, L.P. ("SIP GTF I") SIP Global Tech Fund I, Inc. ("SIP GTF I GP") SIP Global Tech Opportunity LLC ("SIP GTO") SIP Global Tech Opportunity 3 LLC ("SIP GTO 3") SIP Global Tech Opportunity 4 LLC ("SIP GTO 4") SIP Global Opportunity Manager LLC ("SIP GO Mgr") Shigeki Saitoh ("Saitoh") Matthew Salloway ("Salloway") Jeffrey Smith ("Smith") Justin Turkat ("Turkat") The Reporting Persons expressly disclaim status as a "group" for purposes of this Schedule 13G/A.

Address or principal business office or, if none, residence:

(b) SIP GTF I and SIP GTF I GP C/O Conyers Trust Company (Cayman) Limited Cricket Square, Hutchins Dr., P.O. Box 2681 George Town, Grand Cayman KY1-1111 Cayman Islands SIP GTO, SIP GTO 3, SIP GTO 4, SIP GO Mgr, Saitoh, Salloway, Smith and Turkat 16192 Coastal Hwy Lewes, DE 19958

Citizenship:

(c) SIP GTF I Cayman Islands SIP GTF I GP Cayman Islands SIP GTO Delaware SIP GTO 3 Delaware SIP GTO 4 Delaware SIP GO Mgr Delaware Saitoh Japan Salloway United States Smith United States Turkat United States

Title of class of securities:

(d) Common Stock, par value $0.0001 per share

CUSIP No.:

(e)

Item 3. If this statement is filed pursuant to §§ 240.13d-1(b) or 240.13d-2(b) or (c), check whether the person filing is a:

(a) ☐ Broker or dealer registered under section 15 of the Act (15 U.S.C. 78o);

(b) ☐ Bank as defined in section 3(a)(6) of the Act (15 U.S.C. 78c);

(c) ☐ Insurance company as defined in section 3(a)(19) of the Act (15 U.S.C. 78c);

(d) ☐ Investment company registered under section 8 of the Investment Company Act of 1940 (15 U.S.C. 80a-8);

(e) ☐ An investment adviser in accordance with § 240.13d-1(b)(1)(ii)(E);

(f) ☐ An employee benefit plan or endowment fund in accordance with § 240.13d-1(b)(1)(ii)(F);

(g) ☐ A parent holding company or control person in accordance with § 240.13d-1(b)(1)(ii)(G);

(h) ☐ A savings associations as defined in Section 3(b) of the Federal Deposit Insurance Act (12 U.S.C. 1813);

(i) ☐ A church plan that is excluded from the definition of an investment company under section 3(c)(14) of the Investment Company Act of 1940 (15 U.S.C. 80a-3);

(j) ☐ A non-U.S. institution in accordance with § 240.13d-1(b)(1)(ii)(J). If filing as a non-U.S. institution in accordance with § 240.13d-1(b)(1)(ii)(J),
please specify the type of institution:

(k) ☐ Group, in accordance with Rule 240.13d-1(b)(1)(ii)(K).

Item 4. Ownership

Amount beneficially owned:

(a) Row 9 of each Reporting Person's cover page to this Schedule 13G/A sets forth the aggregate number of shares of common stock of the Issuer beneficially owned by such Reporting Person as of September 30, 2026 and is incorporated by reference. The Reporting Persons' ownership of the Issuer's securities consists of (i) 2,990,929 shares of the Issuer's common stock directly held by SIP GTF I; (ii) 1,003,888 shares of the Issuer's common stock directly held by SIP GTO; (iii) 232,710 shares of the Issuer's common stock directly held by SIP GTO 3; and (iv) 10,293 shares of the Issuer's common stock directly held by SIP GTO 4. The decrease in beneficial ownership reported in this Schedule 13G/A resulted solely from pro rata in-kind distributions, for no additional consideration, of shares of the Issuer's common stock by SIP GTO, SIP GTO 3 and SIP GTO 4 to their respective members. SIP GTF I GP is the general partner of SIP GTF I and Smith, Turkat, and Saitoh are directors of SIP GTF I GP. Each of SIP GTF I GP, Smith, Turkat and Saitoh may be deemed to share voting and dispositive power with respect to the shares held by SIP GTF I. SIP GO Mgr is the manager of each of SIP GTO, SIP GTO 3 and SIP GTO 4. Salloway and Turkat are managing members of SIP GO Mgr. Each of SIP GO Mgr, Salloway and Turkat may be deemed to share voting and dispositive power with respect to the shares held by each of SIP GTO, SIP GTO 3 and SIP GTO 4.

Percent of class:

(b) Row 11 of each Reporting Person's cover page to this Schedule 13G/A sets forth the percentage of the shares of common stock of the Issuer beneficially owned by such Reporting Person as of September 30, 2026 and is incorporated by reference. The percentage set forth in each row 11 is based upon 202,614,000 shares of common stock outstanding as of September 30, 2026, as reported in the Issuer's Quarterly Report on Form 10-Q filed with the Securities and Exchange Commission (the "SEC") on November 6, 2026. %

(c) Number of shares as to which the person has:

(i) Sole power to vote or to direct the vote:

Row 5 of each Reporting Person's cover page to this Schedule 13G/A sets forth the sole power to vote or to direct the vote of securities of the Issuer beneficially owned by such Reporting Person as of September 30, 2026 and is incorporated by reference.

(ii) Shared power to vote or to direct the vote:

Row 6 of each Reporting Person's cover page to this Schedule 13G/A sets forth the shared power to vote or to direct the vote of securities of the Issuer beneficially owned by such Reporting Person as of September 30, 2026 and is incorporated by reference.

(iii) Sole power to dispose or to direct the disposition of:

Row 7 of each Reporting Person's cover page to this Schedule 13G/A sets forth the sole power to dispose or to direct the disposition of securities of the Issuer beneficially owned by such Reporting Person as of September 30, 2026 and is incorporated by reference.

(iv) Shared power to dispose or to direct the disposition of:

Row 8 of each Reporting Person's cover page to this Schedule 13G/A sets forth the shared power to dispose or to direct the disposition of securities of the Issuer beneficially owned by such Reporting Person as of September 30, 2026 and is incorporated by reference.

Item 5. Ownership of 5 Percent or Less of a Class.

☑ Ownership of 5 percent or less of a class

Item 6. Ownership of more than 5 Percent on Behalf of Another Person.

Not Applicable

Item 7. Identification and Classification of the Subsidiary Which Acquired the Security Being Reported on by the Parent Holding Company or Control Person.

Not Applicable

Item 8. Identification and Classification of Members of the Group.

Not Applicable

Item 9. Notice of Dissolution of Group.

Not Applicable

Item 10. Certifications:

By signing below I certify that, to the best of my knowledge and belief, the securities referred to above were not acquired and are not held for the purpose of or with the effect of changing or influencing the control of the issuer of the securities and were not acquired and are not held in connection with or as a participant in any transaction having that purpose or effect, other than activities solely in connection with a nomination under § 240.14a-11.

SIGNATURE

After reasonable inquiry and to the best of my knowledge and belief, I certify that the information set forth in this statement is true, complete and correct.

SIP Global Tech Fund I, L.P.

Signature: /s/ Jeffrey Smith
Name/Title: By SIP Global Tech Fund I, Inc., its General Partner, By Jeffrey Smith, Director
Date: 11/13/2026

SIP Global Tech Fund I, Inc.

Signature: /s/ Jeffrey Smith
Name/Title: By Jeffrey Smith, Director
Date: 11/13/2026

SIP Global Tech Opportunity LLC

Signature: /s/ Matthew Salloway
Name/Title: By SIP Global Opportunity Manager LLC., its Manager, By Matthew Salloway, Managing Member
Date: 11/13/2026

SIP Global Tech Opportunity 3 LLC

Signature: /s/ Matthew Salloway
By SIP Global Opportunity Manager LLC., its
Name/Title: Manager, By Matthew Salloway, Managing Member
Date: 11/13/2026

SIP Global Tech Opportunity 4 LLC

Signature: /s/ Matthew Salloway
By SIP Global Opportunity Manager LLC., its
Name/Title: Manager, By Matthew Salloway, Managing Member
Date: 11/13/2026

SIP Global Opportunity Manager LLC

Signature: /s/ Matthew Salloway
Name/Title: By Matthew Salloway, Managing Member
Date: 11/13/2026

Shigeki Saitoh

Signature: /s/ Shigeki Saitoh
Name/Title: Shigeki Saitoh
Date: 11/13/2026

Matthew Salloway

Signature: /s/ Matthew Salloway
Name/Title: Matthew Salloway
Date: 11/13/2026

Jeffrey Smith

Signature: /s/ Jeffrey Smith
Name/Title: Jeffrey Smith
Date: 11/13/2026

Justin Turkat

Signature: /s/ Justin Turkat
Name/Title: Justin Turkat
Date: 11/13/2026

Exhibit Information

Exhibit 99.1 Joint Filing Agreement (incorporated by reference to Exhibit 99.1 to the Reporting Persons' Schedule 13G filed with the SEC on September 30, 2025).