
SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

SCHEDULE 13G

UNDER THE SECURITIES EXCHANGE ACT OF 1934
(Amendment No. 1)*

Ares Acquisition Corp II

(Name of Issuer)

Common stock, par value \$0.0001 per share

(Title of Class of Securities)

G33033104

(CUSIP Number)

09/30/2025

(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. G33033104

Names of Reporting Persons

1

Fort Baker Capital Management LP

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

	Sole Voting Power
5	0.00
Number of Shares Beneficially Owned by Each Reporting Person With:	Shared Voting Power
6	0.00
	Sole Dispositive Power
7	0.00
	Shared Dispositive Power
8	0.00
9	Aggregate Amount Beneficially Owned by Each Reporting Person
	0.00
10	Check box if the aggregate amount in row (9) excludes certain shares (See Instructions)
	<input type="checkbox"/>
11	Percent of class represented by amount in row (9)
	0 %
12	Type of Reporting Person (See Instructions)
	IA

SCHEDULE 13G

CUSIP No. G33033104

1	Names of Reporting Persons
	Steven Patrick Pigott
	Check the appropriate box if a member of a Group (see instructions)
2	<input type="checkbox"/> (a)
	<input checked="" type="checkbox"/> (b)
3	Sec Use Only
4	Citizenship or Place of Organization
	UNITED STATES
	Sole Voting Power
5	0.00
Number of Shares Beneficially Owned by Each Reporting Person With:	Shared Voting Power
6	0.00
	Sole Dispositive Power
7	0.00
	Shared Dispositive Power
8	0.00
9	Aggregate Amount Beneficially Owned by Each Reporting Person
	0.00
10	Check box if the aggregate amount in row (9) excludes certain shares (See Instructions)
	<input type="checkbox"/>

11 Percent of class represented by amount in row (9)
0 %
Type of Reporting Person (See Instructions)
12 IN

SCHEDULE 13G

CUSIP No. G33033104

Names of Reporting Persons

1 Fort Baker Capital, 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

Sole Voting Power

5 0.00

Number of Shares Beneficially Owned by Each Reporting Person With:

6 Shared Voting Power 0.00

Sole Dispositive Power

7 0.00

8 Shared Dispositive Power 0.00

Aggregate Amount Beneficially Owned by Each Reporting Person

9 0.00

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

Percent of class represented by amount in row (9)

11 0 %

Type of Reporting Person (See Instructions)

12 HC

SCHEDULE 13G

Item 1.

Name of issuer:

(a) Ares Acquisition Corp II

Address of issuer's principal executive offices:

(b) 245 Park Avenue, 44th Floor, New York, New York, 10167

Item 2.

Name of person filing:

- (a) Fort Baker Capital Management LP Steven Patrick Pigott Fort Baker Capital, LLC

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

- (b) The principal business address of each reporting person is 700 Larkspur Landing Circle, Suite 275, Larkspur, CA 94939.

Citizenship:

- (c) Fort Baker Capital Management LP: Delaware Limited Partnership Steven Patrick Pigott: Citizen of the United States
Fort Baker Capital, LLC: Delaware Limited Liability Company

Title of class of securities:

- (d) Common stock, par value \$0.0001 per share

CUSIP No.:

- (e) G33033104

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:

Reference is hereby made to Items 5-9 of this Schedule, which Items are incorporated by reference herein. Fort Baker Capital Management LP directly holds 0 Class A Ordinary Shares. Steven Patrick Pigott acts as Limited Partner/Chief Investment Officer for Fort Baker Capital Management LP. Fort Baker Capital, LLC acts as General Partner for Fort Baker Capital Management LP. The Reporting Persons are filing this Schedule 13G jointly, but not as members of a group, and each disclaims membership in a group. Each also disclaims beneficial ownership of the securities reported herein except to the extent of that person's pecuniary interest therein. On September 24, 2025, Ares Acquisition Corp II consummated a business combination. In connection with the business combination, Ares Acquisition Corp II changed its name to Kodiak AI, Inc., and each Class A Ordinary Share of Ares Acquisition Corp II was converted into a share of Kodiak AI, Inc. Common Stock on a 1-for-1 basis. Following the business combination, the Reporting Persons ceased to be the beneficial owners of any Class A Ordinary Shares of Ares Acquisition Corp II.

Percent of class:

- (b) Fort Baker Capital Management LP: 0% Steven Patrick Pigott: 0% Fort Baker Capital, LLC: 0% %

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

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

Fort Baker Capital Management LP: 0 Steven Patrick Pigott: 0 Fort Baker Capital, LLC: 0

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

Fort Baker Capital Management LP: 0 Steven Patrick Pigott: 0 Fort Baker Capital, LLC: 0

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

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

Fort Baker Capital Management LP: 0 Steven Patrick Pigott: 0 Fort Baker Capital, LLC: 0

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 acquired and are held in the ordinary course of business and 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.

Fort Baker Capital Management LP

Signature: /s/ Steven Patrick Pigott

Name/Title: Steven Patrick Pigott, Chief Investment Officer

Date: 11/14/2025

Steven Patrick Pigott

Signature: /s/ Steven Patrick Pigott

Name/Title: Steven Patrick Pigott

Date: 11/14/2025

Fort Baker Capital, LLC

Signature: /s/ Steven Patrick Pigott

Name/Title: Steven Patrick Pigott, Chief Investment Officer

Date: 11/14/2025