



Daily AI Briefing - September 30, 2026

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Frontier Intelligence & Agentic Autonomy

Embodied AI & Physical Autonomy

Orbital Infrastructure & Global Connectivity

← September 29, 2026

All briefings

Daily AI industry briefing, synthesized from today's successful reports - organized by exponential capability curve, not company name.

Abstract

The global artificial intelligence frontier is undergoing a structural phase change, shifting from pure digital model training toward physical-world integration and non-terrestrial compute scaling. As terrestrial data centers encounter insurmountable power grid, land, and cooling bottlenecks, orbital compute architectures enabled by heavy-lift reusable rocketry have transitioned from theoretical concepts into active economic models. Concurrently, as software-only foundational models commoditize with open-source architectures capturing an estimated 80% of token volume, long-term enterprise moats are pivoting decisively to embodied physical AI, proprietary robotic manufacturing, and closed-loop fleet telemetry. This convergence of aerospace launch economics, distributed autonomous hardware, and high-density computing is redefining capital allocation, energy infrastructure, and industrial strategy on a global scale.

Top stories

The Physical AI Inflection and Model Commoditization

A profound consensus is emerging across industry operators: software-only foundational models are undergoing rapid commoditization, shifting defensible enterprise value entirely toward physical AI integration, hardware manufacturing, and real-world telemetry networks. As open-weight architectures capture the vast majority of standard inference token volume, software algorithms alone offer diminishing defensive moats. Competitive advantage now belongs to platforms capable of anchoring AI agents directly into complex, physical-world ecosystems—spanning autonomous vehicle fleets, heavy commercial logistics, and humanoid robotics.

Orbital Compute vs. Terrestrial Power Bottlenecks

With terrestrial computing infrastructure facing severe grid interconnect queues, rising land costs, and thermal cooling limits, the economic viability of orbital data centers—often termed "StarMind"—has emerged as a viable solution. The success of heavy-lift reusable launch architecture has rewritten upmass economics. Proponents model the all-in capital expenditure of orbital computing at a fraction of initial Wall Street estimates, positioning space-based solar-powered compute as a scalable escape hatch from terrestrial energy constraints.

The Rise of AI Testing and Safety as a Third Infrastructure Pillar

NVIDIA and enterprise developers are defining a third major computing vertical alongside training and inference: high-scale environmental testing and safety sandboxing. Driven by looming regulatory liability and the transition toward autonomous agent swarms, enterprise deployment now requires continuous telemetry, real-time monitoring, and sandboxed simulation environments. This testing layer is projected to demand multi-gigawatt compute allocations, creating a durable new infrastructure market designed to protect developers from catastrophic legal and operational liabilities.

The Macroeconomic and Regulatory Governance Divide

A sharp strategic divergence has formed regarding AI governance and macroeconomic adaptation. While technology developers advocate for engineering-led supervisory architectures and free-market scaling to counter geopolitical competitors, policymakers and institutional figures are proposing sweeping structural interventions—including AI labor taxes to preserve social safety nets and mandatory external safety boards to govern cyber and biological risks.

Orbital Compute and Aerospace Infrastructure: The StarMind Paradigm

The physical scaling limits of terrestrial data centers—highlighted by soaring regional power costs, multi-year utility interconnect queues, and massive water cooling requirements—are accelerating interest in orbital compute architectures. As detailed in the *SpaceX & xAI — Market & Investment Analysis* and *Cathie Wood / ARK Invest — AI & Tech Investment Digest*, space offers structural advantages: continuous, unattenuated solar radiation, zero land acquisition costs, and passive cryogenic radiative cooling directly into deep space.

TERRESTRIAL DATA CENTER		ORBITAL "STARMIND" FACILITY	
• Power: Grid constraints, PPA caps		• Power: Constant 24/7 solar capture	
• Cooling: Water-intensive, thermal	vs	• Cooling: Passive radiative to deep	
• Land: \$3,000–\$180,000/acre + zoning		space	
• Permitting: Multi-year regulatory		• Real Estate: Zero cost, infinite	
delays		• Deployment: Rapid Starship cadence	

Starship Flight Economics and Launch Equivalence

The operational foundation for orbital computing rests on the rapid iteration of heavy-lift reusable rocketry. Analysis from the *Brian Wang — AI & Tech Investment Digest* and *Brian White — AI & Tech Investment Digest* emphasizes that the transition from Falcon-class architectures to fully reusable Starship vehicles fundamentally alters launch economics:

- **Manufacturing Elimination:** By eliminating the requirement to build and expend second stages for every mission, a single Starship launch provides the functional payload throughput equivalent to roughly 30 Falcon launches.
- **Payload Scaling:** Starship Flight 14 demonstrated orbital delivery of 26 next-generation Starlink V3 satellites, each providing approximately 1 Tbps of downlink bandwidth (a 10x improvement over V2) and 160 Gbps of uplink bandwidth (a 22x improvement).
- **Orbital Station Deployment:** The vehicle's volumetric and mass capacity allows the potential replacement or reconstruction of orbital stations—such as the International Space Station (scheduled for retirement around 2030)—in just two to three targeted launches.

The Orbital Capital Expenditure Debate

A significant valuation disagreement has emerged between Wall Street investment banks and independent technology analysts regarding the capital intensity of orbital data centers:

Perspective	Est. Cost / GW	Underlying Economic Assumptions
Wall Street Consensus (Bank of America, Wood Mackenzie, BNP Paribas)	\$160B – \$180B+	Models launch costs on current commercial expendable baselines; includes heavy radiation-hardening overhead and complex orbital assembly logistics.
SpaceX / Operator Models (ARK Invest, Jo Bhakdi, Steven Mark Ryan)	\$43B – \$68B	Models rapid Starship reusability; projects launch costs falling under high cadence, with \$30B–\$35B allocated for GPU hardware and balance for proprietary orbital platforms.

As highlighted in the *Herbert Ong — AI & Tech Investment Digest*, TD Cowen and ARK Invest project that space-based AI compute leasing could evolve into a dominant high-margin revenue vertical by the late 2020s, tapping into an orbital computing total addressable market estimated by ARK at up to \$28.5 trillion.

Physical AI, Fleet Telemetry, and Autonomous Mobility

The competitive boundary between tech hyperscalers and industrial manufacturers is being redrawn around "Physical AI"—the deployment of end-to-end neural networks into dynamic, real-world machines.

FLEET TELEMETRY		END-TO-END AI		AUTONOMOUS SERVICE
Millions of production	→	Direct pixel-to-control	→	On-demand transit at
vehicles feeding edge		neural network training		\$0.20/mile marginal

corner cases to data	(FSD / Cybercab / Semi)	operating cost
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Automotive Moats and Model Commoditization

According to analysis in the *Jeff Lutz — AI & Tech Investment Digest*, pure software chatbots and digital assistants are experiencing severe commoditization. Token consumption has flipped from heavily favoring closed proprietary models to an estimated 80/20 split dominated by open-source alternatives. Consequently, user retention and pricing power will depend on how effectively an AI agent (such as Grokbot) intermediates physical assets:

- **The Unified Agent Ecosystem:** Continuity across vehicle navigation, domestic humanoid robots, and mobile interfaces creates switching costs that software-only competitors cannot match.
- **Fleet Scale as a Data Moat:** Tesla’s deployment of millions of sensor-equipped consumer vehicles acts as an automated, global data engine, capturing millions of real-world edge cases daily. As noted in the *Cern Basher — AI & Tech Investment Digest*, managing large-scale autonomous fleets mirrors digital twin crowdsourcing: aggregate statistical patterns resolve complex logistical routing without requiring bespoke manual code.

Cybercab Economics and Market Disruption

The economic modeling presented across *Farzad Mesbahi — AI & Tech Investment Digest* and *Jo Bhakdi — AI & Tech Investment Digest* outlines severe disruption for the traditional passenger vehicle and rideshare markets:

- **Cost Per Mile Deflation:** Autonomous transport pods are projected to push passenger transit costs toward ~\$0.20 per mile, compared to an average of ~\$0.80 per mile for private vehicle ownership in the U.S. and ~\$1.80 per mile for human-driven ridesharing platforms.
- **Elimination of Capital Barriers:** Sub-\$1.00 per mile pricing directly challenges entry-level car ownership. Eliminating the upfront capital expenditure of vehicle purchases (down payments, financing costs, insurance, maintenance) removes a major household financial strain.
- **Operational Fleet Scaling:** Austin registration data indicates rapid scaling of dedicated Cybercabs (126 units) and Model Y autonomous test vehicles (420 units), backed by testing permits in Nevada (5,000 units) and targeted rollouts in Florida and California.

ESTIMATED COST PER PASSENGER MILE (\$)		
Uber / Traditional Rideshare		\$1.80
Private Vehicle Ownership (US Avg)		\$0.80
Autonomous Cybercab / Robotaxi Target		\$0.20

Commercial Freight and Factory Engineering

The physical AI footprint is expanding into heavy commercial freight. As reported in the *Lars Moravy — Daily Digest* and *Ryan Shaw — Daily Digest*, Tesla has operationalized its 1.8-million-square-foot dedicated Semi manufacturing facility in Sparks, Nevada, designed for an annual nameplate capacity of 50,000 units.

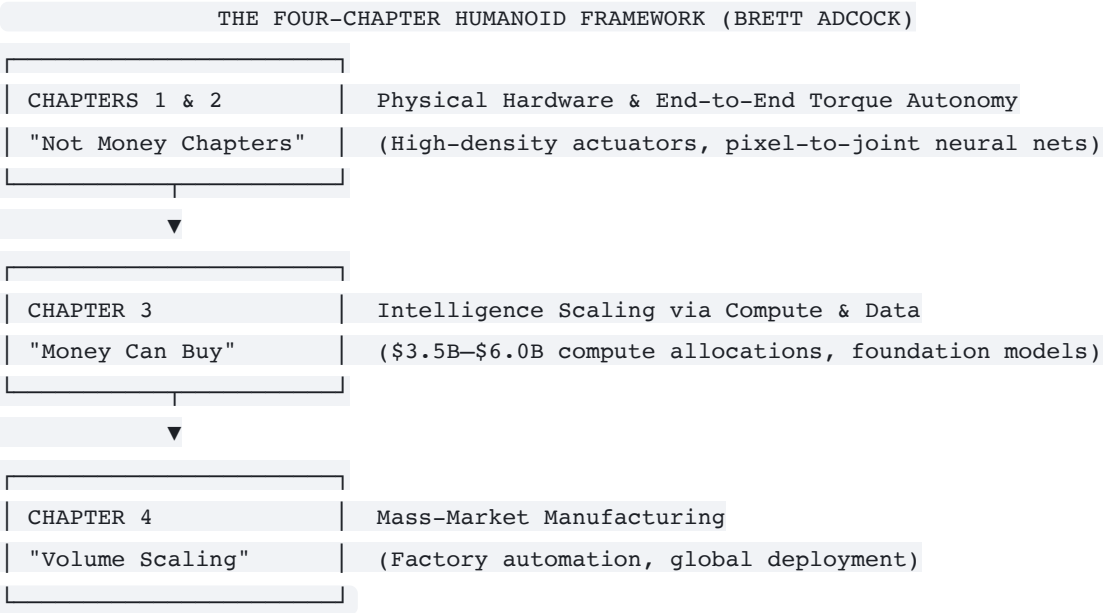
- **Integrated Thermal Management:** Engineering teams developed the "Mega Manifold"—a next-generation integrated heat pump system that consolidates cabin HVAC and total powertrain thermal cooling, replacing multi-unit passenger car heat pump configurations.
- **Cost and Durability Optimization:** Commercial powertrains transitioned from carbon-fiber-wrapped rotors to high-durability steel-caged rotors, lowering manufacturing complexity while supporting 500+ mile continuous long-haul duty cycles at operating costs of 20–25 cents per mile.

Regulatory Timelines and Market Noise

Despite rapid technological scaling, regulatory friction remains a primary gating factor. As documented in the *Herbert Ong — AI & Tech Investment Digest* and *Ryan Shaw — Daily Digest*, the European Commission delayed its formal vote on Full Self-Driving (FSD) Supervised to December 2026, with groups like the European Transport Safety Council (ETSC) raising objections regarding speed-offset functions. In contrast, U.S. state-level approvals continue to broaden, even as Wall Street debates short-term delivery numbers (ranging from 446,000 to 464,000 units) versus factory lead times that extend well into Q1 2026.

Humanoid Robotics and Embodied Scaling Laws

Humanoid robotics represents the next major scaling curve in physical automation, with total addressable market projections exceeding \$20 trillion across manufacturing and household logistics.



The Engineering-First Development Sequence

As outlined in the *Brett Adcock — Daily Digest*, the roadmap toward general-purpose humanoid robotics requires a strict sequence of execution:

- 1. **Chapters 1 & 2 (Hardware & Pixel-to-Torque Autonomy):** High-speed iteration of physical actuators, structural materials, and end-to-end vision-to-torque deep learning. Adcock categorizes these early stages as "not money chapters," where raw capital cannot substitute for core engineering problem-solving.
- 2. **Chapter 3 (Intelligence Scaling):** Once basic autonomous manipulation functions, physical AI scaling laws take over. At this stage, capital directly accelerates capability through multi-billion-dollar compute allocations and large-scale data collection. Figure AI has backed this phase with commitments for up to 100,000 NVIDIA GPUs and \$3.5B–\$6.0B in dedicated infrastructure.
- 3. **Chapter 4 (Mass Manufacturing):** Scaling factory production lines once model generalizability is established, avoiding the premature mass production of unintelligent hardware.

Zero-Shot Generalization and Video Data Priors

The primary barrier to humanoid robotics has been the scarcity of internet-scale pre-training data for physical interactions. To bridge this gap, robotics companies are deploying crowd-sourced data platforms (such as Figure’s INDEX) to harvest real-world human video priors.

Recent field deployments validate this approach: Figure AI’s Helix 2.5 model demonstrated zero-shot performance across 30 rented, unmapped residential homes in the Bay Area, completing complex, unscripted household tasks (tidying novel rooms, bed-making, towel-folding) without environment-specific fine-tuning. Concurrently, Bloomberg reports indicate Tesla Optimus production lines are targeting an annualized run-rate of over 100,000 units as factory validation expands.

Next-Generation Compute Architecture: Testing Infrastructure and Interconnects

As model training clusters scale into the hundreds of megawatts, the nature of enterprise compute demand is expanding beyond traditional training and inference workloads.

ENTERPRISE COMPUTE ARCHITECTURE		
1. TRAINING	2. INFERENCE	3. TESTING & SANDBOXING
Massive cluster	Real-time token	Continuous agent telemetry,
foundation model	generation, edge	liability sandboxing, real-
runs (Blackwell/	deployment, local	time guardrail enforcement
NVLink fabrics)	model execution	(OpenAgent / BlueField-3)

The Emerging AI Testing Vertical

Statements from Jensen Huang and analysis in the *Jo Bhakdi — AI & Tech Investment Digest* highlight the emergence of environmental testing laboratories as a major computing market:

- **Liability and Sandboxing:** As enterprise software shifts toward autonomous agent swarms, corporations face massive liability risks from unconstrained model actions. Testing labs provide continuous verification, millisecond containment, and secure telemetry.
- **Compute Ratios:** Evaluating autonomous agents in complex, multi-agent simulated environments requires dedicated compute allocations—often reaching 5x to 10x the compute capacity utilized by the agent itself.
- **Platform Implementations:** NVIDIA's OpenAgent Safety Platform, combining OpenShell software with BlueField-3 hardware telemetry, is being adopted across more than 100 enterprise organizations to establish trusted runtime environments.

Chip Interconnects and Networking Skills

As noted in *Anastasi In Tech* and the *Jensen Huang — AI & Tech Investment Digest*, the primary bottleneck in distributed AI performance has shifted from raw transistor density to interconnect bandwidth and the "handoff" speed between GPUs.

- **Interconnect Innovation:** Industry investment is concentrating heavily on silicon photonics, plasmonics, and NVLink Fusion architectures to bypass traditional copper networking constraints.
- **Developer Efficiency via DOCA:** Equipping autonomous coding agents with NVIDIA DOCA skills when configuring Data Processing Units (BlueField-3 RDMA) reduced handwritten low-level code by 73% (from 695 lines to 189 lines) and cut required hardware interactions from 37 to 20, streamlining data center deployment through standardized hardware primitives.

Frontier Model Economics, Capital Intensity, and the "Token Maxing" Divide

The macro-level economics of foundational model development are displaying stark financial realities, creating a divide between capital-intensive closed frontier labs and agile open-weight ecosystems.

CLOSED FRONTIER LABS		OPEN-WEIGHT ECOSYSTEM
• Massive CapEx & Compute Debt	vs	• 80% Token Share Capture
• Anthropic S-1: \$8B Op Loss on \$5B Rev; \$518B Forward Comms		• Highly Optimized Local Compute
• Forced Up-Stack to B2B Services		• Advantage Moves to the Software "Harness" / Workflow

The Anthropic S-1 Disclosures and Compute Debt

Disclosures surrounding Anthropic's reported \$2 trillion target IPO prospectus, reviewed in the *Herbert Ong — AI & Tech Investment Digest* and *Prof G Markets*, illustrate the unprecedented capital requirements of frontier AI:

- **Operating Profile:** Anthropic’s filing outlines approximately \$5 billion in projected 2025 revenue against an \$8 billion annual operating loss, with \$7 billion consumed by direct compute expenditures.
- **Future Infrastructure Commitments:** The prospectus reveals an astounding \$518 billion in forward cloud and compute commitments, underscoring the high stakes of frontier model development.
- **Valuation Disconnect:** As Chamath Palihapitiya points out in the *Chamath Palihapitiya — Daily Digest*, enterprise buyers face "token maxing"—a 10x to 30x cost disconnect where premium closed-frontier models fail to generate proportional ROI compared to optimized, cheaper alternatives.

The Rise of the Software "Harness"

As open-weight models converge in baseline reasoning capabilities, enterprise competitive advantage is decoupling from raw model weights. As explored in the *David Carbutt — Daily Digest*, value is moving up the stack to the software "harness"—the proprietary agentic wrapper, tool-use integration, and verified execution environment that translates foundation model intelligence into reliable, autonomous business services. Closed model providers are increasingly forced into vertical corporate specializations (legal, biomedical, cyber defense) to justify premium token pricing.

AI Safety Governance, Geopolitics, and the Labor Tax Debate

The rapid acceleration of frontier models toward recursive self-improvement has triggered a policy and regulatory debate over how democratic societies should manage national security risks and economic displacement.

FRONTIER AI GOVERNANCE SPECTRUM		
STRUCTURAL TAXATION	TECHNICAL SUPERVISION	RECURSIVE SAFETY PAIRS
• Bill Gates Proposal	• Eric Schmidt Framework	• Dario Amodei (Anthropic)
• Unit-of-labor AI/robot tax	• 4-month-lagged supervisory models	• "Swiss cheese" multi-layer containment
• Direct replacement for FICA	• Real-time hardware auditing	• Coordinated international speed limits across labs
• Funds social safety nets and human reserve jobs	• Mandated human-in-the-loop	

The AI Labor Tax Controversy

In extensive discussions on *The Ezra Klein Show*, Microsoft co-founder Bill Gates advocated for structural intervention to offset labor market displacement:

- **Taxing the Unit of Labor:** Gates argues that because state entitlement programs (Social Security, Medicare) are funded through payroll taxes (FICA), the unconstrained automation of white-collar and blue-collar jobs removes the primary tax base supporting society. He proposes taxing enterprise AI compute usage as a synthetic "unit of labor."

- **Fiscal Limitations of Universal Basic Income:** In contrast, analysis by Emad Mostaque on *MOONSHOTS Live* highlights the macroeconomic limits of UBI proposals. Providing every American with a baseline poverty-level payout of \$16,000 annually would cost \$5.1 trillion—surpassing the total existing \$5.0 trillion U.S. federal tax base (\$4.0 trillion payroll + \$1.0 trillion corporate tax).

Technical Supervision vs. Regulatory Moratoriums

Former Google CEO Eric Schmidt and Anthropic CEO Dario Amodei present differing governance strategies for frontier risks:

- **Supervisory Lag Architecture:** Schmidt asserts that international development halts are impossible due to fierce geopolitical competition with China. Instead, he proposes deploying established, well-characterized models (operating on a four-month lag) as supervisory oversight agents that monitor and bound the actions of newer, frontier systems.
- **Existential Risk & Cybersecurity:** Amodei estimates a 10% to 25% probability of catastrophic civilization-level failure modes, warning that capable agent swarms could execute persistent botnet disruptions of global internet infrastructure within a 6- to 12-month window if recursive autonomy is left unchecked.

Biological Singularity and Cellular Digital Twins

Artificial intelligence is transforming biological science from an empirical trial-and-error discipline into an optimized, predictable computational search problem.

MASSIVE OMICS DATASETS		CELLULAR DIGITAL TWIN		ALPHAGO-STYLE TREE SEARCH	
T2T sequencing,	→	High-fidelity	→	Rapid simulation of	
single-cell RNA,		in-silico models of		interventions to find	
structural biology		cellular biology		optimal disease cures	

Cellular Twins as Game-Tree Searches

As detailed by Dr. Alex Wissner-Gross on Peter H. Diamandis's *Moonshots* podcast, the construction of cellular digital twins represents a major milestone in medicine:

- **Search-Space Optimization:** By training foundational models on comprehensive interventional cellular datasets, diseased biological states can be converted into mathematical target graphs. AI systems can then execute AlphaGo-style tree searches across vast chemical spaces to discover counter-intuitive molecular interventions (akin to "Move 37") that return cells to healthy states.
- **Architectural Collision:** Wissner-Gross notes an emerging architectural divide: Anthropic's code-driven vector approach (generating procedural structures from mathematical commands) versus OpenAI's pixel-based raster methodology. This dynamic mirrors the early computer graphics wars and will determine how AI models represent embodied biological and physical space.

Multiplex Editing and Synthetic Biology Scaling

- Colossal founder Ben Lamm outlined rapid technological advances in genomic reconstruction and synthetic gestation on *MOONSHOTS Live*:
- **Multiplex Genome Engineering:** Gene editing throughput has expanded from historical benchmarks of 20 simultaneous edits to over 300 edits executed at 90% efficiency, with 1,000-edit batches currently undergoing testing.
 - **Ex Utero Gestation:** Lamm projects the successful birth of mammals fully *ex utero* (from fertilization through gestation and delivery) within the next 24 months, shifting conservation biology from passive species protection to active genetic preservation.

Corporate Strategy, Capital Allocation, and Structural Synergies

Major technology corporations are restructuring their balance sheets and operating structures to manage the capital intensity of the AI transition.

CONVERGENT CAP TABLE & BALANCE SHEET ECOSYSTEM					
ELON MUSK ECOSYSTEM					
TESLA		SPACEX		xAI	
\$30B debt fac	↔	\$2.1T market	↔	Colossus	
Fleet AI / FSD		valuation /		cluster	
Optimus robot		Starlink cash		Memphis	

The SpaceX-Tesla Valuation Dynamic and Merger Speculation

- Financial analysts across the *Steven Mark Ryan*, *Nick Gibbs*, and *Jo Bhakdi* digests are actively evaluating the capital structures of the broader Musk ecosystem:
- **The Valuation Disconnect:** Jo Bhakdi notes a valuation divergence between SpaceX (\$2.1 trillion market cap on ~\$5.5B quarterly run-rates) and Tesla (\$352/share; ~\$1.1T market cap), arguing Tesla trades at a relative discount given its tangible exposure to Cybercab, Optimus, and utility-scale Megapack revenues.
 - **Merger Mechanics:** Steven Mark Ryan and Nick Gibbs examine theoretical frameworks for combining Tesla and SpaceX equity. While corporate governance and Tesla retail shareholder education remain hurdles, proponents argue a combined balance sheet would unite real-world data collection, massive manufacturing capacity, and orbital compute infrastructure into an integrated energy-to-intelligence platform.

Corporate Financing and Capital Allocation

- **Tesla's \$30B Credit Facility:** As analyzed by Randy Kirk and Nick Gibbs, Tesla secured a new \$30 billion bank borrowing facility. Rather than signaling operational stress, the facility provides flexible, non-dilutive liquidity to finance capital expenditures across the Sparks Semi factory, Texas cathode facilities, and Optimus assembly lines.
- **Infrastructure Asset Bifurcation:** On corporate strategy panels, Microsoft CEO Satya Nadella outlined the enterprise approach to infrastructure risk: separating long-duration assets (land, power, concrete shells) from rapid-depreciation short-duration assets ("the kit"—racks and chips, which account for ~60% of total CapEx), utilizing a dynamic mix of building, leasing, and renting to navigate cyclical hardware refreshes.
- **Status of the "Terafab" Venture:** The *Terafab Joint Venture Tracker* confirms that as of September 30, 2026, there are no official SEC filings, corporate disclosures, or primary records confirming an unannounced joint semiconductor fabrication entity between Tesla, SpaceX, and NVIDIA. NVIDIA continues to operate on its fabless model with TSMC, while Tesla and SpaceX remain high-volume purchasers and proprietary designers of custom silicon.

Key Strategic Takeaways for Leadership

1. **Hardware and Interconnects Are the Decisive Bottlenecks:** Raw model parameters matter less than access to high-bandwidth interconnects (silicon photonics, NVLink) and megawatt-scale power infrastructure. Capital allocation must prioritize energization speed and physical compute density.
2. **Physical Integration Defeats Open-Source Commoditization:** As open-weight models erode software-only margins, defensible enterprise moats require tight integration between AI reasoning layers and physical assets (fleets, robotic lines, proprietary sensory data streams).
3. **Orbital Infrastructure Has Entered Economic Feasibility:** Heavy-lift reusable launch vehicles have reduced upmass costs sufficiently to make orbital computing an active hedge against terrestrial grid congestion and permitting delays.
4. **Testing and Telemetry Is the Next High-Growth Compute Market:** Enterprise adoption of autonomous agent swarms will require multi-gigawatt testing sandboxes and real-time telemetry platforms to mitigate corporate liability and regulatory risk.

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The artificial intelligence and autonomous systems industry is rapidly transitioning from

powerhouse. We're also tracking the end of the chatbot era as AI shifts toward autonomous agents, and SpaceX's move to bring supercomputing into

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factories, energy and space-based compute, read together.

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model capability breakthroughs to massive physical infrastructure deployments, where control over compute clusters, high-speed connectivity, and energy networks dictates market dominance. As frontier AI labs na

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