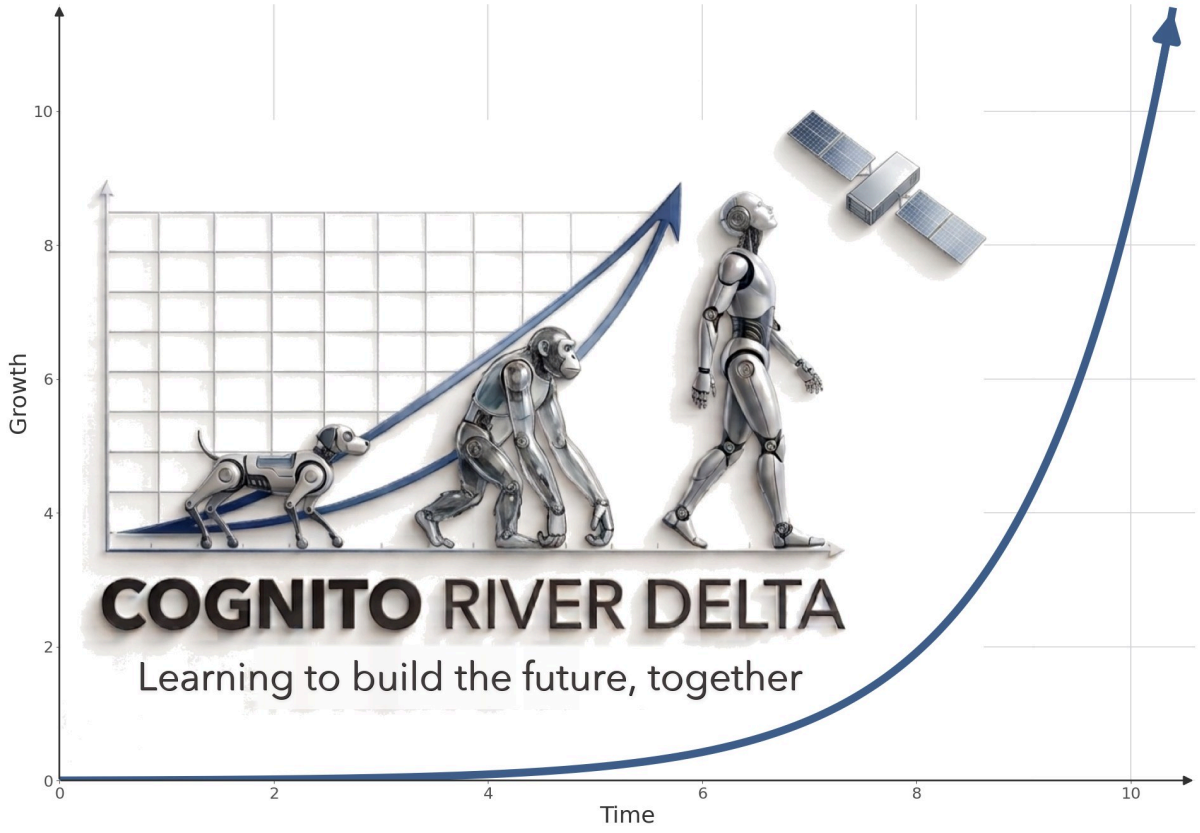


DAILY DEEP ANALYSIS

Daily deep analysis - 2026-10-11

October 11, 2026

Tesla faces a make-or-break 12-week window heading into year-end 2026 with 17 major product, regulatory, and corporate catalysts on the table, including the Next-Gen Roadster demo, Optimus 3 updates, and European FSD reg

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DAILY DEEP ANALYSIS

Daily deep analysis - 2026-10-11

October 11, 2026 · 22 min read

Frontier labs & models

Daily AI industry deep analysis, synthesized from tracked video sources, news and independently researched claims - organized by exponential capability curve, not company name.

ALERTS: most important developments today

Topic	Score	Sources	Items	Most recent item
Tesla (company, TSLA, energy)	71.1	29	53	Why Are Buyers Switching to Tesla? Brian White #Tesla (Brighter with Herbert)
SpaceX and Starship	66.0	38	58	Tesla’s Next 2 Months Could Change Everything (Brighter with Herbert)
FSD, Robotaxi and Cybercab	47.8	17	30	Why Are Buyers Switching to Tesla? Brian White #Tesla (Brighter with Herbert)
Starlink	44.7	38	48	Tesla’s Model Y just beat the VW Golf in Germany 🤯 More Pro (BestInTESLA)
Elon Musk (general)	42.8	28	41	Why Are Buyers Switching to Tesla? Brian White #Tesla (Brighter with Herbert)
Humanoid robots (Optimus and others)	40.9	8	9	Tesla’s Next 2 Months Could Change Everything (Brighter with Herbert)
NVIDIA and Jensen Huang	39.7	19	29	Your Spark, Your Story: Allyson Vasquez / NVIDIA RTX Spark (NVIDIA (Jensen Huang))
Earth-based data centers	35.6	21	42	Google's Jacqueline Dory Prescott named data center portfoli (Data Center Dynamics)

Score = topic weight x (log of recency-weighted coverage + log of independent sources + a bonus per followed person/channel who covered it).

Topic deep dives

Tesla (company, TSLA, energy)

What is new

- **European Market Performance:** In September, the Model Y became the bestselling passenger vehicle in Denmark, Finland, Iceland, Norway, and Sweden (BestInTESLA). In Germany, the Model Y beat the VW Golf (8,000 units vs. 6,500 units) and the Tiguan in September (BestInTESLA).
- **Cybercab Deployment:** Tesla's Cybercab fleet in Austin has seen rapid growth, increasing from 169 to 319 vehicles "overnight" (BestInTESLA). Other reports describe the Austin fleet as having "soared 8x in a month" (Benzinga) and being "amazing to use" (Kimbal Musk via Benzinga).
- **Regulatory Branding Shifts:** Under pressure from European regulators, Tesla has dropped "self-driving" branding in Europe and renamed its FSD system to "Assisted Driving" (Automotive News, Technology Org, marketscreener.com, Brighter with Herbert).
- **Regulatory Probes:** U.S. regulators are investigating Tesla robotaxis for speeding in school zones (Quartz), and the NHTSA has opened a defect petition involving approximately 1,000 robotaxi vehicles (TradingView).
- **Product Timelines:** Optimus robots are targeted for a 2027 launch (TechRepublic), and a Model 3 refresh is expected in 2027 (Brighter with Herbert).
- **Infrastructure & Space:** SpaceX received FCC approval to operate up to 15,000 next-generation satellites for direct-to-phone connectivity, offering 100 times the bandwidth of the previous version (BestInTESLA).

Where sources agree

- **Austin Fleet Expansion:** Sources agree that Tesla's robo taxi/Cybercab fleet in Austin is expanding rapidly (BestInTESLA, Benzinga, Jo Bhakdi).
- **European Regulatory Pressure:** Multiple sources confirm that Tesla is rebranding FSD as "Assisted Driving" in Europe to appease regulators (Automotive News, Technology Org, marketscreener.com, Brighter with Herbert).

Where sources disagree or differ

- **Cybercab Growth Rate:** BestInTESLA reports the fleet nearly doubled (from 169 to 319), while Benzinga claims the fleet "soars 8x in a month."
- **FSD as a Consumer Driver:** Brian White identifies FSD as the "weakest" of the three primary reasons buyers are switching to Tesla (Brighter with Herbert), whereas other sources highlight "unbelievable" testimonials from users and "amazing" experiences (Brighter with Herbert, Benzinga).

Numbers and claims to verify

- **Tesla Germany Sales:** 44,800 units in the first 9 months, a 202% increase over the same period in 2025 (BestInTESLA) — *Needs checking: the 2025 date is anachronistic/incorrect.*
- **Porsche China Sales:** Fell from 43,800 in 2023 to 14,500 in 2026 (BestInTESLA) — *Needs checking: the 2026 date is anachronistic.*
- **Mercedes EBIT:** Reported a fall of approximately 94% year-over-year in Q2 2026 (BestInTESLA) — *Needs checking: the 2026 date is anachronistic.*
- **Global Market Share:** Gas-powered cars have fallen below 50% of total global sales (Brighter with Herbert) — *Needs checking: requires industry-wide data verification.*
- **Model Y vs. Golf:** 8,000 units vs. 6,500 units in Germany for September (BestInTESLA) — *Needs checking: requires official registration data.*

Investment implications (informational, not advice)

- **Market Expansion:** Strong sales growth in Germany and the Nordics suggests increasing competitiveness against legacy automakers like Volkswagen, which is simultaneously facing profit warnings and massive recalls (BestInTESLA).
- **Regulatory Risk:** The rebranding of FSD in Europe (Automotive News) and active US probes into speeding and defects (Quartz, TradingView) indicate ongoing regulatory friction that could impact the rollout of autonomous services.
- **Future Catalysts:** Investors are tracking a compressed 12-week window for 17 major milestones, including the next-gen Roadster and Optimus 3 (Brighter with Herbert), alongside a 2027 target for Optimus production (TechRepublic).
- **Diversification:** The expansion of Starlink's direct-to-phone capabilities and new airline partnerships (KLM) suggests SpaceX is expanding its telecommunications footprint (BestInTESLA).

SpaceX and Starship

What is new

- **Starlink Mobile Expansion:** The FCC has approved SpaceX to operate up to 15,000 next-generation satellites for direct-to-phone connectivity, which are expected to provide 100 times the bandwidth of current versions (BestInTESLA). To support this, SpaceX acquired Grain Management's 800 MHz spectrum portfolio to launch a standalone Starlink mobile carrier (SatNews Publishers), a deal valued at $8 billion (TradingKey).
- **Telecom Market Disruption:** The acquisition of low-band spectrum is putting pressure on US telecom operators (internationalfinance.com) and could shake up the US wireless market (TradingView), specifically targeting providers like AT&T (Yahoo Finance).
- **Starship Logistics and Testing:** A recovered Starship has returned to Texas after several months at sea (San Antonio Express-News). Analysts describe the next Starship flight as the "biggest test" yet (Benzinga), with investors expected to focus on technical milestones rather than immediate results (Yahoo Finance).
- **Aviation Partnership:** KLM has selected Starlink to provide free high-speed Wi-Fi on intercontinental flights, starting in mid-2027 (BestInTESLA).
- **Orbital Risks:** Experts have warned that SpaceX's plan for a million satellites could trigger a debris cascade that might close off space (24/7 Wall St).

Where sources agree

- **Telecom Ambitions:** Both BestInTESLA and multiple news sources (SatNews Publishers, TradingKey, internationalfinance.com) agree that SpaceX is aggressively moving into the mobile telecommunications space to challenge existing carriers.
- **Starship Significance:** There is a consensus among news outlets (Benzinga, Yahoo Finance, The Motley Fool) that upcoming Starship launches and technical milestones are critical drivers for the company's perceived value and stock.

Where sources disagree or differ

- **Operational Outlook:** While BestInTESLA highlights the technical potential of the new satellites (100x bandwidth), 24/7 Wall St focuses on the environmental and safety risks, suggesting the scale of the satellite plan could create a dangerous debris cascade.
- **Analytical Focus:** News items from Yahoo Finance suggest investors should prioritize "tech milestones" over "results," whereas The Motley Fool links the Starship launch

directly to the impact on SpaceX's stock.

Numbers and claims to verify

- **15,000 next-generation satellites** - BestInTESLA - Need to verify the exact number and scope of the FCC approval.
- **100 times the bandwidth** - BestInTESLA - Technical claim regarding the version two system that needs engineering verification.
- **$8 billion spectrum deal** - TradingKey - Need to verify the exact financial terms of the Grain Management acquisition.
- **Million-satellite plan debris risk** - 24/7 Wall St - Need to verify if this is a consensus scientific view or a minority warning.
- **SpaceX worth more than the current Earth economy** - Elon Musk (via BestInTESLA) - An extraordinary valuation claim that requires extreme scrutiny.

Investment implications (informational, not advice)

- **Telecom Sector Volatility:** The move toward a standalone Starlink mobile carrier using low-band spectrum suggests a direct competitive threat to traditional US wireless providers (internationalfinance.com, TradingView).
- **Starship as a Valuation Driver:** Technical success in catching Starship (BGR) and achieving upcoming flight milestones (Benzinga) are viewed as primary catalysts for SpaceX's valuation (The Motley Fool).
- **Regulatory Headwinds:** The warning regarding a "debris cascade" (24/7 Wall St) could indicate future regulatory hurdles or restrictions on the number of satellites SpaceX is permitted to launch.

FSD, Robotaxi and Cybercab

What is new

- **Austin Robotaxi Expansion:** Tesla's Cybercab fleet in Austin has seen rapid growth, increasing from 169 to 319 vehicles "overnight" (BestInTESLA). Another source reports the fleet "soared 8x in a month" (Benzinga) and notes that Kimbal Musk described the Cybercab as "amazing to use" (Benzinga).

- **Regulatory and Safety Issues:** The NHTSA has opened a defect petition involving an estimated 1,000 Robotaxi vehicles (TradingView). Additionally, France has stated that Tesla's FSD falls short of the safety bar (Stocktwits).
- **European Rebranding:** Under pressure from regulators, Tesla has renamed FSD to "Assisted Driving" in Europe (Technology Org, marketscreener.com) and Germany (Brighter with Herbert - Something Changed).
- **Technical Integrations:** Robotaxis are now shipping with built-in Starlink, a feature Elon Musk claims will eventually come to every car (Stocktwits). The Cybercab is also noted to be mirrorless, providing a "visibility upgrade" for riders (Teslarati).
- **Upcoming Milestones:** There is a reported 12-week window for Tesla to achieve 17 major milestones, including the deployment or demonstration of the Vegas robotaxi service and a regulatory vote on FSD approval in Europe (Brighter with Herbert - Next 2 Months).

Where sources agree

- **Austin Fleet Growth:** Both BestInTESLA and Benzinga agree that the Robotaxi fleet in Austin is expanding rapidly.
- **European Name Change:** Multiple sources (Technology Org, marketscreener.com, Brighter with Herbert - Something Changed) agree that FSD has been rebranded as "Assisted Driving" in Europe/Germany due to regulatory pressure.

Where sources disagree or differ

- **FSD's Appeal as a Sales Driver:** Brian White claims that while FSD is a reason buyers switch to Tesla, it is the "weakest" of the three primary motivators (Brighter with Herbert - Why Are Buyers Switching). Conversely, other sources highlight testimonials describing FSD as "unbelievable" (Brighter with Herbert - Something Changed) or "seamless" and "smooth" (BestInTESLA).
- **Performance vs. Safety:** A user experience report claims the "vision-only" system outperformed Waymo's LiDAR-based system in rain (BestInTESLA), yet regulatory bodies in France claim the system falls short of safety bars (Stocktwits) and the NHTSA is investigating defects (TradingView).

Numbers and claims to verify

- **Fleet size increase from 169 to 319** - BestInTESLA - needs checking against Texas DMV records.
- **Robotaxi fleet grew 8x in one month** - Benzinga - needs checking for consistency with the specific fleet numbers provided by BestInTESLA.
- **Estimated 1,000 Robotaxi vehicles in NHTSA defect petition** - TradingView - needs verification of the exact number of vehicles involved.
- **FSD renamed in Europe due to regulatory pressure** - Technology Org / marketscreener.com - needs verification via official Tesla or regulatory filings.

Investment implications (informational, not advice)

- **Market Sentiment:** Wall Street is reportedly seeking "tangible" milestones regarding the Robotaxi and Optimus (Stocktwits).
- **Geographic Expansion:** There are indications that the Cybercab may be eyeing expansion into Dallas (TradingView).
- **Regulatory Risk:** Significant headwinds exist in Europe, characterized by the forced renaming of FSD and a negative safety assessment from France (Stocktwits, Technology Org).
- **Product Roadmap:** The integration of Starlink into the Robotaxi fleet suggests a tighter convergence of Musk's companies to enhance vehicle connectivity (Stocktwits).

Claims to verify (collected)

- **Tesla (company, TSLA, energy):** Tesla Germany Sales:** 44,800 units in the first 9 months, a 202% increase over the same period in 2025 (BestInTESLA) — *Needs checking: the 2025 date is anachronistic/incorrect.*
- **Tesla (company, TSLA, energy):** Porsche China Sales:** Fell from 43,800 in 2023 to 14,500 in 2026 (BestInTESLA) — *Needs checking: the 2026 date is anachronistic.*
- **Tesla (company, TSLA, energy):** Mercedes EBIT:** Reported a fall of approximately 94% year-over-year in Q2 2026 (BestInTESLA) — *Needs checking: the 2026 date is anachronistic.*
- **Tesla (company, TSLA, energy):** Global Market Share:** Gas-powered cars have fallen below 50% of total global sales (Brighter with Herbert) — *Needs checking: requires industry-wide data verification.*
- **Tesla (company, TSLA, energy):** Model Y vs. Golf:** 8,000 units vs. 6,500 units in Germany for September (BestInTESLA) — *Needs checking: requires official registration*

data.

- **SpaceX and Starship:** 15,000 next-generation satellites** - BestInTESLA - Need to verify the exact number and scope of the FCC approval.
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- **FSD, Robotaxi and Cybercab:** Fleet size increase from 169 to 319** - BestInTESLA - needs checking against Texas DMV records.
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Appendix: Perspectives by person

We see further because we stand on the shoulders of giants. The people in this appendix are some of those giants: their public work, followed and studied every day and every week, is how CognitoRiverDelta brings the world's AI knowledge and concerns together, so that, in time, our expert panel can help shape real solutions and paths forward for all of us. We learn by observing them, and we think of them as kindred spirits: people helping humanity and AI educate each other and contribute to solutions. Together they form a much larger community of minds, a worldwide panel; ours is a small copy of it. Most people don't want to become expert kayakers, reading rocks and rapids every day; yet that is how this fast-flowing river of change feels to many of us, and the evidence that could ease those fears, the grounded ones and the imagined ones, is still being gathered. That is the work. We credit their ideas here with gratitude; they are not affiliated with us and do not endorse this report.

Each voice's own point of view today, most relevant first - follow the links to their channels for the full story.

Herbert Ong

Brighter with Herbert host and interviewer · YouTube · X

Tesla faces a make-or-break 12-week window heading into year-end 2026 with 17 major product, regulatory, and corporate catalysts on the table, including the Next-Gen Roadster demo, Optimus 3 updates, and European FSD regulatory voting. Simultaneously, shifting global market dynamics show gas-powered vehicle sales dipping below 50% worldwide, with Tesla capturing market share across Europe and Asia primarily driven by high fuel prices and localized vehicle availability.

Brian Wang

NextBigFuture founder and technology analyst · YouTube · X

Brian Wang modeled a $600 to $1,000-per-share valuation trajectory for SpaceX by 2027, driven by rapid terrestrial and space-based AI data center buildouts capable of generating tens of billions in annual revenue capacity. Concurrently, Wang argued that realizing an industrial-scale 10X productivity shift requires overcoming severe physical bottlenecks in electricity generation, compute supply, and software deployment pipelines.

Jensen Huang

NVIDIA founder and CEO · YouTube · X

NVIDIA published a creator feature in its RTX Spark series spotlighting Allyson Vasquez and individual creative workflows. The release illustrates how creators leverage NVIDIA RTX technology alongside generative AI and 3D design software, specifically ComfyUI and Blender, to blend digital modeling with physical projects.

David Carbutt

AI, Tesla, and SpaceX story analyst

David Carbutt published a video titled *Elon & Google's Bet of their LIFETIME Just Paid Off!* on October 11, 2026, though the available source material consists only of a promotional

description without a dialogue transcript. Consequently, his public output for this period contains no technical analysis or commentary on AI, Tesla, or SpaceX, focusing instead on his sponsor Wispr Flow, community links, and professional recommendations.

Jordan Giesige

The Limiting Factor host and analyst · YouTube · X

Latest from 2026-10-04: Jordan Giesige has announced he is transitioning away from regular video production to join Rebellionaire as a managing editor, where he will use AI to help disseminate their insights. He maintains that Tesla has passed its most existential "do or die" phase and is now operating in a more mature stage of its development.

Lars Moravy

Tesla Vice President of Vehicle Engineering

Latest from 2026-09-29: Moravy highlighted a comprehensive redesign of the Tesla Semi, focusing on integrated thermal management and more durable motor components, while teasing the upcoming Roadster.

Phil Beisel

Silicon Valley product development and EV analyst · X

Latest from 2026-10-04: Phil Beisel views the convergence of space-based infrastructure and AI as a transformative shift, where Starlink and "Star Mind" will form a dominant global compute and communication fabric. This evolution is driven by iterative aerospace improvements and massive capital requirements for Tesla's large-scale industrial and AI projects.

Steven Mark Ryan

Solving The Money Problem host and analyst · YouTube · X

Steven Mark Ryan argues that SpaceX's aggressive expansion into mobile telecommunications via Starlink direct-to-cell represents an existential disruption to incumbent wireless carriers, evidenced by immediate market sell-offs across major telecom stocks. Backed by multi-billion-dollar low-band spectrum acquisitions and FCC satellite

approvals, Ryan projects that Starlink mobile subscribers will quickly scale to eclipse its home broadband user base.

Chamath Palihapitiya

Social Capital founder and former Facebook executive · X

Latest from 2026-10-09: Chamath Palihapitiya frames capital as the ultimate instrument of agency and relevance, arguing that decentralized capital allocation by 330 million Americans provides a higher-fidelity economic signal than 500 corporate CEOs. Across recent appearances, he couples contrarian market and political predictions with an emphasis on hard execution, praising Elon Musk's industrial scaling at Tesla's Gigafactory while outlining the strict governance architecture required for enterprise superintelligence deployment.

Dr. Alex Wissner-Gross

AI expert and MIT graduate · X

The Singularity is transitioning from an open secret to a closed loop of recursive self-improvement, driven by exponential compute scaling, massive infrastructure investments, and the explosive emergence of autonomous agent swarms.

Dylan Patel

SemiAnalysis founder and chief analyst · YouTube · X

Frontier labs are experiencing an unexpected "revenue and profitability fast takeoff," driving demand that outpaces even their own internal forecasts and forcing high-premium GPU procurement. This surge exacerbates a massive infrastructure mismatch: NVIDIA's 46 GW support capacity is vastly insufficient to meet the projected 240 GW of incoming demand, necessitating a shift in how private credit markets manage risk.

Emad Mostaque

Former Stability AI leadership · X

Latest from 2026-10-02: Emad Mostaque emphasizes open-weight model efficiency, decentralized infrastructure, and granular AI governance while warning of macro-fiscal limits on Universal Basic Income and systemic firmware risks in humanoid robotics deployment. He

projects that efficient open-weight alternatives will severely disrupt proprietary API-driven frontier labs within two years.

Eric Schmidt

AI and computer science commentator · X

Latest from 2026-10-06: Eric Schmidt argues that corporate revenue in the AI sector is strictly bound by data center hardware capacity and energy supply rather than traditional high-margin software dynamics, fundamentally reconfiguring tech economics toward physical infrastructure. On global security, he asserts that AI progress cannot be paused, requiring instead lagged supervisory model architectures and strict international treaties—especially "no surprises" protocols for autonomous agents and nuclear safety—to bound autonomous systems and sovereign competition.

Nick Bostrom

Futurist studying existential risk from super intelligence

Latest from 2026-10-01: Bostrom posits that the advent of superintelligence creates a bifurcation between existential catastrophe and a "deep utopia" of post-labor leisure. He argues that traditional metrics for assessing AI, such as self-reporting, are unreliable and that technical interventions like steering vectors are required to probe the true internal states of artificial minds.

Brett Adcock

Figure AI founder · X

Latest from 2026-10-05: Brett Adcock asserts that achieving true household utility requires general-purpose humanoid hardware paired with end-to-end deep learning operating directly on physical hardware. Backing this product vision, Adcock detailed scaling Figure AI's platform via a $3.5 billion compute commitment (expanding toward $6 billion) and crowdsourced human demonstration data from over 107,000 Index users, while positioning the upcoming Figure 4 as a generational leap over Figure 3.

Ezra Klein

Political and technology commentator · X

Latest from 2026-10-11: Ezra Klein examines the compounding friction of the modern technological landscape, highlighting how the shift toward knowledge workers managing AI agents could degrade job satisfaction, much like administrative "time taxes" drain civic life. Across his recent programs, Klein links these micro-level workplace transformations to broader institutional concerns about frontier AI safety cultures, market-driven infrastructure degradation, and the aesthetic erosion of public spaces.

Gwynne Shotwell

SpaceX Chief Operating Officer

Latest from 2026-10-11: Gwynne Shotwell analyzes industrial scaling through an operational lens, arguing that terrestrial land, energy, and thermal constraints make orbital "supercompute" constellations a necessity. She also details ongoing Starship reusability milestones and notes cross-company technical support for staffing gaps at xAI.

Sam Altman

OpenAI executive and speaker · X

Latest from 2026-10-04: Sam Altman confirmed OpenAI will build humanoid robots tailored to human environments, viewing physical embodiment as secondary to solving the core model intelligence. Across his recent public appearances, Altman advocates for tightly controlled frontier pacing and closed institutional governance, asserting that managing exponential existential risk and systemic societal misalignments outweighs rapid commercialization or near-term IPO pressures.

Scott Galloway

NYU Stern professor and tech analyst · X

Latest from 2026-10-06: Scott Galloway highlights a bifurcated economic landscape where the AI trade is diverging between fundamentals-driven cash generators like NVIDIA and speculative insider-exit liquidity events like Anthropic's planned $2 trillion IPO. Across macroeconomic and infrastructure fronts, he warns that the data center buildout is fraught with premature speculation and community resistance, the bond market sell-off is a structural artifact rather than a deficit story, and political promises regarding job growth for men are contradicted by federal capital allocation trends.

Ben Thompson

Stratechery author and Sharp Tech co-host · YouTube · YouTube (SharpTechPodcast) · X

Ben Thompson examined how AI disruption threats facing Google's core business model are actively evolving as personal agents and agentic platforms advance. He evaluated the strategic positioning of both Google and Apple against emerging threats like Muse and OpenAI's "dots," alongside broader platform shifts toward superintelligence.

Dan Wang

Technology writer and geopolitics analyst · X

Latest from 2026-09-29: Dan Wang argues that Western stagnation in infrastructure and state capacity is a byproduct of prioritizing "sounding clever" in law and politics over tangible engineering and manufacturing. He suggests that while AI may disrupt the white-collar professions the West has prioritized, the ultimate winners will be those who can bridge the gap between software intelligence and physical, real-world production.

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- AI Reshuffle: The Tech Jobs Being Cut vs The Ones Being Created - Free Press Journal (via Google News), Oct 12
- Elon Musk Pushes Affordable Starlink Pricing in India Amid Reliance Jio Dispute - Siliconindia (via Google News), Oct 12
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- Amazon may spend $7 billion on AI startup Decart that Anthropic walked away from after off - The Times of India (via Google News), Oct 12

Run notes

- Models: local:gemma4:31b
- Elapsed: 284 min
- Topics not analyzed (time/errors): Starlink (error), Elon Musk (general) (error), Humanoid robots (Optimus and others) (error), NVIDIA and Jensen Huang (error), Earth-based data centers (error), xAI and Grok (incl. Grok Bot) (error), AI agents and automation (Grok, Claude, computer use) (error)
- Claims above come from named speakers and outside articles; treat specifics as unverified until checked. Not financial advice.

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- **New, iteration 2:** See it from the Moon - a rail gun fires compute satellites into a ring around the sun (our forecast, not to scale)
- **Iteration 3:** Real scale - Earth and the Moon to scale, and the round-spheres fix a real-phone tester found
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