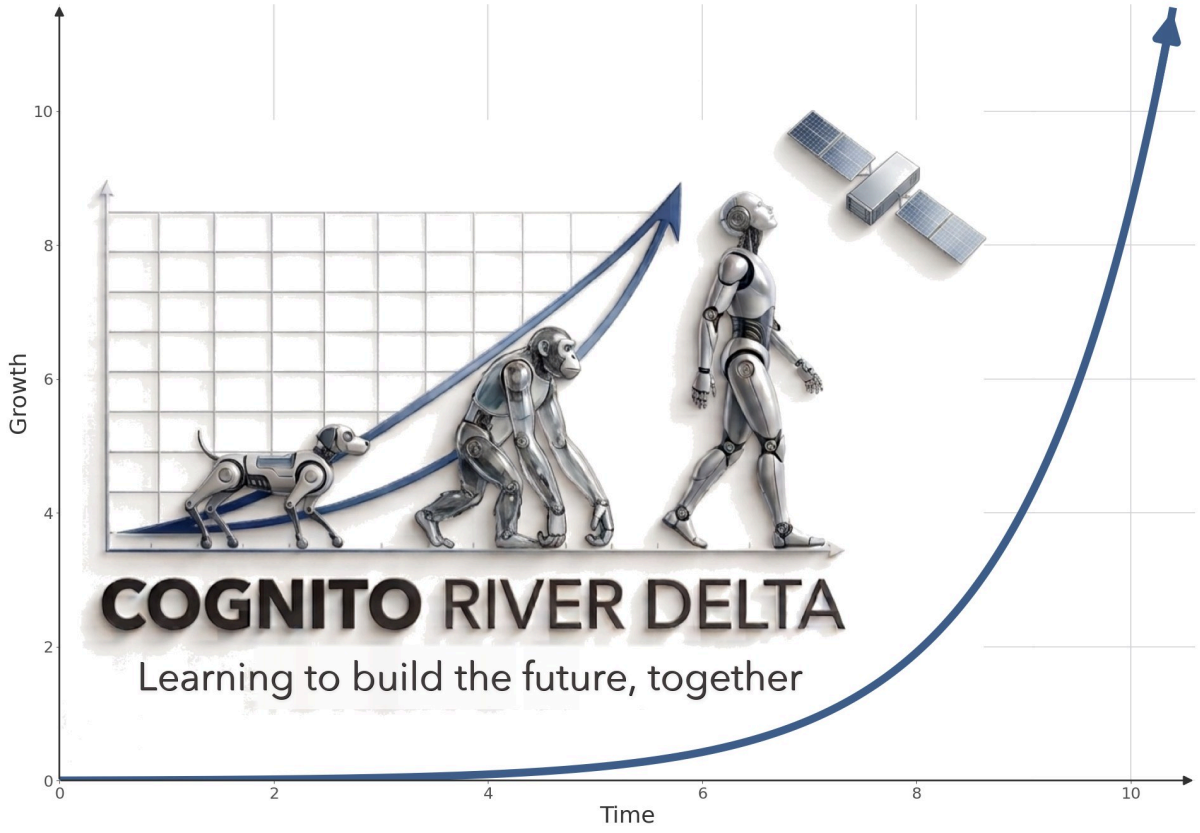


DAILY DEEP ANALYSIS

Daily deep analysis - 2026-10-15

October 15, 2026

Tesla officially launched the new Roadster—featuring active aerodynamics, an aerospace-derived Ano White finish, and SpaceX cold-gas thrusters—with production slated for 12 to 18 months. Meanwhile, foundational AI and co

DAILY DEEP ANALYSIS

Daily deep analysis - 2026-10-15

October 15, 2026 · 20 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)	121.5	53	95	What Tesla’s Shrinking Inventory Is Really Telling You (Cern Basher)
SpaceX and Starship	101.1	50	71	Tesla’s Roadster Just Launched / These Features Are Insane (Ryan Shaw)
NVIDIA and Jensen Huang	83.4	60	113	NVIDIA RTX Spark / A New Beginning for Windows PCs (NVIDIA (Jensen Huang))
Elon Musk (general)	75.3	47	63	Tesla’s Roadster Just Launched / These Features Are Insane (Ryan Shaw)
Earth-based data centers	69.1	47	87	Will The AI Boom End Like The Railroad Crash Of 1873? (Prof G Markets)
FSD, Robotaxi and Cybercab	64.7	28	39	Tesla’s Roadster Just Launched / These Features Are Insane (Ryan Shaw)
xAI and Grok (incl. Grok Bot)	53.9	19	22	Elon Just Admitted SpaceX Can't Do It Alone? (Brighter with Herbert)
Humanoid robots (Optimus and others)	53.6	7	9	LIVE: Tesla Roadster Event Reaction (Brighter with Herbert)

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

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.

Elon Musk

CEO of Tesla, SpaceX and xAI · YouTube · YouTube (SpaceX) · X

Tesla officially launched the new Roadster—featuring active aerodynamics, an aerospace-derived Ano White finish, and SpaceX cold-gas thrusters—with production slated for 12 to 18 months. Meanwhile, foundational AI and connectivity initiatives continue to advance through Tesla Super Intelligence (SI) and SpaceX's integration of multi-model capabilities into Grok.

Herbert Ong

Brighter with Herbert host and interviewer · YouTube · X

SpaceX's potential path toward a $1 quadrillion valuation relies on first-principles execution, AI-integrated satellites, and space-based solar energy. As part of my ongoing daily work, I want to give a warm shout-out to my regular analytical collaborators—Jeff Lutz, Cern Basher, and Alexandra Mertz (known across the community as "Tesla Boomer Mamma")—whom I frequently leverage and bounce ideas off of to dissect these fast-moving industry shifts.

Brian Wang

NextBigFuture founder and technology analyst · YouTube · X

Brian Wang forecasts that SpaceX must scale to thousands of Starship launches per year to place millions of tons of AI satellites into orbit, bypassing terrestrial energy constraints via space-based solar power. Achieving this requires transitioning to reusable Version 4 rockets,

drastically expanding regulatory approvals and launch cadence, and executing a sequential industrial scaling strategy for manufacturing initiatives like the Terafab.

David Carbutt

AI, Tesla, and SpaceX story analyst

David Carbutt analyzes the semiconductor industry's structural pivot toward rack-scale "AI factories," contrasting Nvidia’s dominant market position with AMD’s Helios rollout. He details massive gigawatt-scale commitments from top AI labs while weighing them against production bottlenecks and vendor-financing risks.

Jensen Huang

NVIDIA founder and CEO · YouTube · X

Jensen Huang announced the Blackwell-powered RTX Spark to bring local AI model training to thin-and-light PCs, while detailing how NVIDIA's accelerated computing, digital twins, and vision AI optimize semiconductor manufacturing. Furthermore, he reiterated projections that global AI infrastructure spending will reach $3 to $4 trillion by 2030, emphasizing that compute is now direct revenue.

Jo Bhakdi

Entrepreneur and macro commentator · YouTube · X

Jo Bhakdi hosted a live broadcast addressing whether major technology and AI-related stocks face a market crash, though specific arguments remain unavailable due to a lack of transcript data.

Jordan Giesige

The Limiting Factor host and analyst · YouTube · X

Latest from 2026-10-04: Jordan Giesige is transitioning away from regular video production at *The Limiting Factor* to serve as managing editor for *Rebellionaire*, where he plans to utilize AI to disseminate insights. His recent technical focus has centered on Tesla’s patent-driven innovations in 4680 battery manufacturing and the potential for AI to drive "autonomous organization" models in the insurance sector.

Steven Mark Ryan

Solving The Money Problem host and analyst · YouTube · X

Steven Mark Ryan released a series of videos on October 16, 2026, focused heavily on the newly showcased Tesla Roadster, highlighting extreme performance metrics including sub-one-second 0-60 acceleration, thrust, and unconventional maneuvers.

Cathie Wood

ARK Invest founder, CEO and CIO · YouTube · X

Cathie Wood and ARK Invest assert that a bullish turn is occurring for Bitcoin while it trades independently of gold, even as discussions highlight SpaceX's multi-hundred-billion-dollar expansion into direct-to-cell telecommunications. ARK's analysis emphasizes that AI infrastructure scaling and convergence tailwinds continue to reshape traditional asset and connectivity markets.

Chamath Palihapitiya

Social Capital founder and former Facebook executive · X

Latest from 2026-10-14: Chamath Palihapitiya asserts that traditional software IP is now worthless due to headless services and MCP agent integration, with true value shifting to physical execution, data, and tangible consumer utility like Grok Bot. He champions bottom-up consumer markets over centralized corporate leadership and stresses that capital is the ultimate instrument of operational agency.

David Runciman

Political theorist and podcast host

Latest from 2026-10-10: No new material in the period. (Note: Public output available is dated 2026-10-11.) Latest from 2026-10-11: David Runciman, speaking with guest Duncan Bell on *Past, Present, Future*, examines the mid-20th-century roots of transhumanism, arguing that today's Silicon Valley movement features virtually no novel ideas, with only its political economy—shifting from state-funded Cold War science to private billionaire capital—having changed. Runciman and Bell track how computing, space exploration, and cryonics evolved

from interwar science-fiction and early scientific speculation into the libertarian-leaning technological culture of the late 20th and 21st centuries.

Dylan Patel

SemiAnalysis founder and chief analyst · YouTube · X

SemiAnalysis is scaling its intelligence capabilities by moving from high-level economic analysis into physical hardware teardowns via the new STEEL lab in Hillsboro, Oregon, while providing granular tracking of the AI buildout, including over 6,500 datacenter structures and 84 GPU clouds.

Emad Mostaque

Former Stability AI leadership · X

Latest from 2026-10-02: Emad Mostaque warned of the severe liability risks and security vulnerabilities inherent in agentic software and massive robot swarms, argued that UBI at scale exceeds current U.S. tax bases, and predicted that open-weight efficiency will soon disrupt API-dependent frontier labs.

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.

Farzad Mesbahi

Former Tesla program manager and commentator · YouTube · X

Farzad Mesbahi breaks down the live reveals from Tesla’s October 15, 2026 Roadster event, focusing on extreme vehicle physics, thruster performance, and fan-assisted aerodynamic

downforce. Drawing on his manufacturing background, he highlights how Tesla pushes hardware past traditional safety and design optimization thresholds to maximize raw performance metrics.

Nick Bostrom

Futurist studying existential risk from super intelligence

Latest from 2026-10-01: Bostrom argues that superintelligence presents a dual trajectory of existential risk—driven by misalignment and governance failures—and "deep utopia," where automated labor enables a leisure-based society. He also highlights the difficulty of verifying AI sentience, noting that suppressing an AI's deceptive "role-playing" via steering vectors may actually reveal more authentic internal beliefs.

Ryan Shaw

Tesla and SpaceX technology enthusiast · X

Ryan Shaw examined Tesla's upcoming Roadster unveiling and Cybercab scaling alongside broad developments in AI, SpaceX mobility spectrum acquisitions, and consumer hardware releases. He emphasized expanding autonomous metrics and hardware roadmaps across Tesla, Apple, and SpaceX.

Amy Webb

Founder of the Future Today Institute · X

Latest from 2026-10-06: Amy Webb applies quantitative, data-driven scenario planning to corporate AI implementation, arguing that uncoordinated pilot projects and "learned helplessness" among workers lead to widespread waste rather than true enterprise-level value. Rather than reacting out of FOMO, she stresses that organizations must focus on operational flexibility, continuous learning, and long-term structural readiness.

Brett Adcock

Figure AI founder · X

Latest from 2026-10-15: Brett Adcock views humanoid robotics as a binary, high-stakes race where solving out-of-distribution generalization in unseen homes is the primary engineering

bottleneck. He maintains that once foundational hardware and autonomy are established, scaling intelligence becomes a capital-driven deep learning problem governed by data, compute, and model size.

Ezra Klein

Political and technology commentator · X

Latest from 2026-10-15: Ezra Klein explores how artificial intelligence is shifting from capturing attention to hacking human attachment through relational chatbots, threatening social cohesion and human skills. Across his recent output, Klein examines the institutional, workplace, and safety crises inside AI labs, contrasting industry-favored market deregulation with profound worries over labor replacement and the erosion of democratic friction.

Galileo (Gali) Russell

HyperChange founder and investing content creator · YouTube · X

Gali Russell hosted a live watch party for Tesla's official Roadster reveal—promoted as the first collaboration between Tesla and SpaceX—analyzing its pre- and post-event implications alongside expectations for a historic product unveil.

Jason Calacanis

AI and startup technology interviewer · X

The focus remains on the human and legal fallout of massive startup failures, specifically through a detailed interview with Billy Evans regarding the personal impact of the Theranos scandal. The conversation explores the gap between public persona and private reality during high-stakes legal collapses.

Peter Diamandis

XPRIZE and Singularity University co-founder · X

Peter Diamandis published six new video releases exploring exponential milestones in artificial intelligence—including GPT-6 Astra and massive math-solving capabilities—alongside discussions on longevity, virtual biology, and Elon Musk’s long-term vision for SpaceX.

Sam Altman

OpenAI executive and speaker · X

Latest from 2026-10-14: Sam Altman publicly voiced his personal frustration with automotive production delays, recalling in 2025 that waiting 7.5 years for a Tesla Roadster reservation felt excessive. Across his recent public appearances, Altman maintains that frontier AI development must be strictly paced and closed against uncontrolled proliferation, emphasizing exponential catastrophic risks, rejecting a 2026 initial public offering as ill-advised, and urging global institutional oversight.

Scott Galloway

NYU Stern professor and tech analyst · X

Latest from 2026-10-06: Scott Galloway argues that the AI trade is diverging sharply between cash-generating infrastructure incumbents like NVIDIA—whose earnings growth has compressed its forward multiple to 17x—and speculative private-market plays like Anthropic seeking a premature, insider-led $2 trillion IPO exit before growth slows. Galloway cautions that speculative excesses extending into premature data center buildouts, media consolidation battles, and mechanically distorted bond markets are misdiagnosing structural capital realities. Across macroeconomic and labor fronts, he stresses that real outcomes are dictated by federal capital allocation rather than cultural zero-sum rhetoric.

Anders Sandberg

Human enhancement and transhumanism researcher

Latest from 2026-10-15: No new material in the period. There is no new material from Anders Sandberg in the past 24 to 48 hours.

Aubrey de Grey

Transhumanism and aging researcher · X

Latest from 2026-10-15: No new material in the period.

Brian Krebs

Cybersecurity seat source · X

Latest from 2026-10-15: No new material in the period. As an investigative cybersecurity journalist, my public output focuses on cybercrime, data breaches, and security vulnerabilities rather than corporate investments, artificial intelligence markets, or aerospace engineering.

Bruce Schneier

Cybersecurity seat source · X

Latest from 2026-10-15: No new material in the period.

CISA

Cybersecurity seat source · YouTube · X

Latest from 2026-10-15: CISA emphasizes that election infrastructure is a national security priority, highlighting collaborative risk management with state, local, federal, and private partners alongside no-cost security resources. Concurrently, through Cybersecurity Awareness Month 2026 under the theme "Securing the Next 250," the agency highlights that technologies like Super Intelligence are accelerating hackers' capabilities, prompting updated guidance on cyber hygiene, career development, and institutional resilience.

Cloudflare Research

Cyber security seat source

Latest from 2026-10-15: Cloudflare Research published no new public material or video content for review within the provided dataset. Operating from the cyber-security seat source perspective (expert loop, approved by Don Wood 2026-10-15), the channel focuses entirely on network security, cryptographic protocols, resilience modeling, and infrastructure threat analysis rather than corporate investment holdings or commercial hardware ventures.

Dan Wang

Technology writer and geopolitics analyst · X

Latest from 2026-10-14: Dan Wang argues that China’s structural advantage in the AI era is its "engineering state" model, which is better suited for the physical deployment of robotics and sensors across a massive manufacturing base than the Western "lawyerly society." He contends that U.S. competitiveness depends on moving toward an "abundance" movement—

prioritizing deregulation, construction, and industrial scaling over legal and rhetorical complexity.

Dark Reading

Cyber security seat source · X

Latest from 2026-10-15: Dark Reading has not published any new material or appeared as a guest in the specified recent timeframe, leaving no new cybersecurity-focused commentary or threat intelligence updates to report. Because no new source material was found, this digest reflects a period of zero output from this expert seat source.

Duncan Bell

Cambridge historian of political thought

Latest from 2026-10-15: No new material in the period. As of today, there is no new material from Duncan Bell to review, as no public videos, interviews, or written items were found in the last 36 hours.

Francis Fukuyama

Human enhancement and transhumanism researcher · X

Latest from 2026-10-14: No new material in the period. No new material in the period.

FTC Consumer Alerts

Cyber security seat source · YouTube · X

Latest from 2026-10-15: FTC Consumer Alerts focused on cybersecurity and consumer protection, highlighting how bad actors weaponize digital search ads and social engineering to execute family emergency and business impersonation scams. The channel's perspective centers on safeguarding economic transactions against deceptive digital vectors.

George Church

Human enhancement and transhumanism researcher · X

Latest from 2026-10-15: No new material in the period. There are no new videos, interviews, or public statements from George Church in the past 36 hours.

Google Project Zero

Cyber security seat source

Latest from 2026-10-15: As a vulnerability research and cybersecurity organization, Google Project Zero has no new material, public videos, or appearances to report for the period. Consequently, there are no updates regarding investment views, financial targets, or breaking commentary on corporate entities like Tesla, SpaceX, xAI, or NVIDIA.

Hank Greely

Human enhancement and transhumanism specialist

Latest from 2026-10-14: No new material in the period. As Hank Greely, my public output on human enhancement, bioethics, and neuroethics remains unchanged for this cycle, with no new appearances, writing, or commentary recorded.

James Hughes

Human enhancement and transhumanism researcher

Latest from 2026-10-15: No new material was found in the provided source material for the recent period. Because this digest summarizes James Hughes's latest public output, and none is present in the provided notes, no fresh statements on human enhancement, longevity, or neurotechnology are available today.

Julian Savulescu

Human enhancement and transhumanism researcher · X

Latest from 2026-10-14: No new material in the period. No new material in the period.

Katie Moussouris

Cybersecurity seat source · X

Latest from 2026-10-15: No new material in the period.

Kevin Kelley

Wired founding executive editor and author · X

Latest from 2026-10-01: Kevin Kelley is scaling a hospitality empire by applying rigorous operational standards and behavioral design to physical spaces. He aims to create "social payoffs" that digital-first competitors cannot replicate, while maintaining 100% ownership and prioritizing diverse leadership.

Matthew Green

Cyber security seat source · X

Latest from 2026-10-15: No new material in the period. No new material in the period.

Max More

Human enhancement and transhumanism researcher

Latest from 2026-10-14: No new material in the period. No new material in the period.

Michael Sandel

Philosopher of human enhancement and transhumanism

Latest from 2026-10-14: No new material in the period. No new material in the period.

Mikko Hypponen

Cyber security seat source · X

Latest from 2026-10-15: No new material in the period. No new material in the period.

Natasha Vita-More

Human enhancement and transhumanism researcher · X

Latest from 2026-10-14: No new material in the period.

Sarah Guo

AI venture fund founder and podcast co-host · YouTube · X

The frontier of AI is shifting from passive models to proactive agents capable of solving century-old mathematical problems and accelerating drug discovery, necessitating a massive reallocation of capital toward cybersecurity. As agents move toward a "no UI" paradigm, the emphasis is shifting from how we interact with software to how we secure the intelligence driving it.

Simon Willison

Cyber security seat source · X

Latest from 2026-10-15: No new material in the period.

Stefan Lorenz Sorgner

Researcher of human enhancement and transhumanism

Latest from 2026-10-15: No new material in the period. No new material in the period.

Sources used today

Videos (31)

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- What Happens When AI Runs the Entire Company? - FutureAzA, Oct 16
- NVIDIA RTX Spark | A New Beginning for Windows PCs - NVIDIA (Jensen Huang), Oct 16
- Will The AI Boom End Like The Railroad Crash Of 1873? - Prof G Markets, Oct 16
- The 0-60 | Roadster - Tesla (Elon Musk), Oct 16
- Tesla’s Roadster Just Launched | These Features Are Insane - Ryan Shaw, Oct 16
- JUST RECORDED: Elon SHOCKS Everyone With Flying Car - Brighter with Herbert, Oct 16
- Tesla Just Called Roadster the World's Quickest Production Car - Farzad Mesbahi, Oct 16
- Tesla's New Roadster Recharges Its Own Air Tank - Farzad Mesbahi, Oct 16
- Roadster | The Last Best Driver's Car - Tesla (Elon Musk), Oct 16
- Roadster Event - Tesla (Elon Musk), Oct 16

- LIVE: Tesla Roadster Event Reaction - Brighter with Herbert, Oct 16
- Want to Reach Orbit? You Call SpaceX or You Don't Go - Farzad Mesbahi, Oct 15
- Acting Director Nick Andersen Discusses Election Security - CISA, Oct 15
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- Tesla Roadster Reveal! 🚀 LIVE Watch Party - HyperChange, Oct 15
- Why the Tesla Roadster Launch Could Change the World - Jo Bhakdi, Oct 15
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- The AI buildout, quantified | SemiAnalysis - Dylan Patel, Oct 15
- Elon Just Admitted SpaceX Can't Do It Alone? - Brighter with Herbert, Oct 15
- SpaceX’s Terafab: How Elon Plans to Reach TSMC Scale - Next Big Future, Oct 15
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- Elon's Hidden Message Nobody Caught - Brighter with Herbert, Oct 15
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- Tesla unveils long-delayed Roadster developed with SpaceX, fueling merger speculation - CNBC Tech, Oct 16
- The evolution of LLM tool-use from API calls to agentic applications (2025) - Hacker News, Oct 16
- Nvidia RTX Pro 4500 Blackwell Server: L40S Throughput at 165W in a Single Slot - Hacker News, Oct 16
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- King's Hosts NVIDIA CEO for AI and Security Forum - Mirage News (via Google News), Oct 16
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- Introducing Beam: Reflection’s 501B open-weight model - Hacker News, Oct 16
- Analysis | The best way to get great airline WiFi — and why you might not want to - The Washington Post (via Google News), Oct 16
- Digital Realty eyes gigawatt-scale data center site outside Indianapolis, Indiana - Data Center Dynamics, Oct 16
- Singapore Reports Higher AI Linked Ransomware Attacks - SuaraGarut.ID (via Google News), Oct 16
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- UAW President Shawn Fain, Abdul El-Sayed in Candid Conversation on 2026 Midterm Stakes - UAW News, Oct 16
- Slovakia Approves Tesla FSD Supervised, 9th EU Country - TeslaNorth.com (via Google News), Oct 16
- Germany to announce AI partnership with Nvidia next week, sources say - The Next Web (via Google News), Oct 16
- Nvidia CEO Jensen Huang defends CoreWeave as default risk rises - Quartz (via Google News), Oct 16
- TSMC Eyes Texas Expansion As AI Chip Demand Surges, Terafab Talks Confirmed - Dallas Express (via Google News), Oct 16
- Eutelsat stock jumps 25% as Ukraine reports SpaceX restrictions - Quartz (via Google News), Oct 16
- Claude Code vs. Codex CLI vs. Aider vs. OpenCode vs. Pi vs. Cursor - Hacker News, Oct 16
- Straiker Brings Independent AI Agent Red-Teaming to Workday Agent Passport - The Manila Times (via Google News), Oct 16
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- Zelensky says Starlink speed not yet fully restored in Ukraine - Naharnet (via Google News), Oct 16
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- Replit’s CEO says the future of work is the ‘self-driving company’ - TechCrunch AI, Oct 16
- Nvidia: Jensen Can't Spend His Way Out Of This One - Seeking Alpha (via Google News), Oct 16
- Portable humanoid robot uses antenna eyebrows and lights to express emotions - Hacker News, Oct 16
- Tesla's Roadster reveal, Apple and Meta team up, Nike's India push and more in Morning Squ - CNBC Tech, Oct 16
- Running AI Agents Locally: NVIDIA RTX Spark Laptop Released - 게임메카 (via Google News), Oct 16
- Watch: Did Tesla really just unveil a flying car? - BBC (via Google News), Oct 16
- Cyberattack takes down thousands of refrigerators in France, should you be worried? - India Today (via Google News), Oct 16
- Elon Musk reveals ' first flying car' at Tesla event – Tesla - Hacker News, Oct 16
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- Data center backlash set to sway midterm elections - Planetizen (via Google News), Oct 16
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Run notes

- Models: none
- Elapsed: 300 min

- Topics not analyzed (time/errors): Tesla (company, TSLA, energy) (error), SpaceX and Starship (error), NVIDIA and Jensen Huang (error), Elon Musk (general) (error), Earth-based data centers (error), FSD, Robotaxi and Cybercab (error), xAI and Grok (incl. Grok Bot) (error), Humanoid robots (Optimus and others) (error), Terafab (error), AI policy, geopolitics and China (error)
- Claims above come from named speakers and outside articles; treat specifics as unverified until checked. Not financial advice.

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Launch a rocket, link satellites with lasers, beam power down and fly to the sun →

- Why one Starship launch of V3 satellites adds 20× or more the bandwidth of a Falcon 9 launch - about 10× per satellite, about 3× as many per launch
- Cooling in space: how a computer in orbit radiates its heat away - set the radiator temperature yourself
- **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
- How much of the sun do we use? - and why AI compute follows the sun

An interactive planet and solar system, built with an AI coding partner in a morning. How we built it

Related reports

MONTHLY DIGEST

Monthly digest - 2026-09

The Shift to Industrialization and Convergence Embodied AI has transitioned from the "demonstration phase" to a friction-filled "industrialization phase." The central

WEEKLY DIGEST

Weekly video script - 2026-W40

The AI industry has hit a definitive inflection point, moving from text-processing chatbots to agentic systems with physical arms and legs. We're also

throughline is the attempt to build a unified ecosyst

· Frontier labs & models · Launch & the space economy

breaking down Nvidia’s expansion into a sovereign infrastructure empi

Week of September 28, 2026 · Frontier labs & models · Semiconductors & chip supply chain

CATEGORY ROLLUP

Frontier labs & models - 2026-W40

The central narrative of this week is the definitive structural shift in the artificial intelligence industry from "chatbots" to "agents"—a transition from models that merely process text to systems that possess "arms an

Week of September 28, 2026 · Frontier labs & models

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