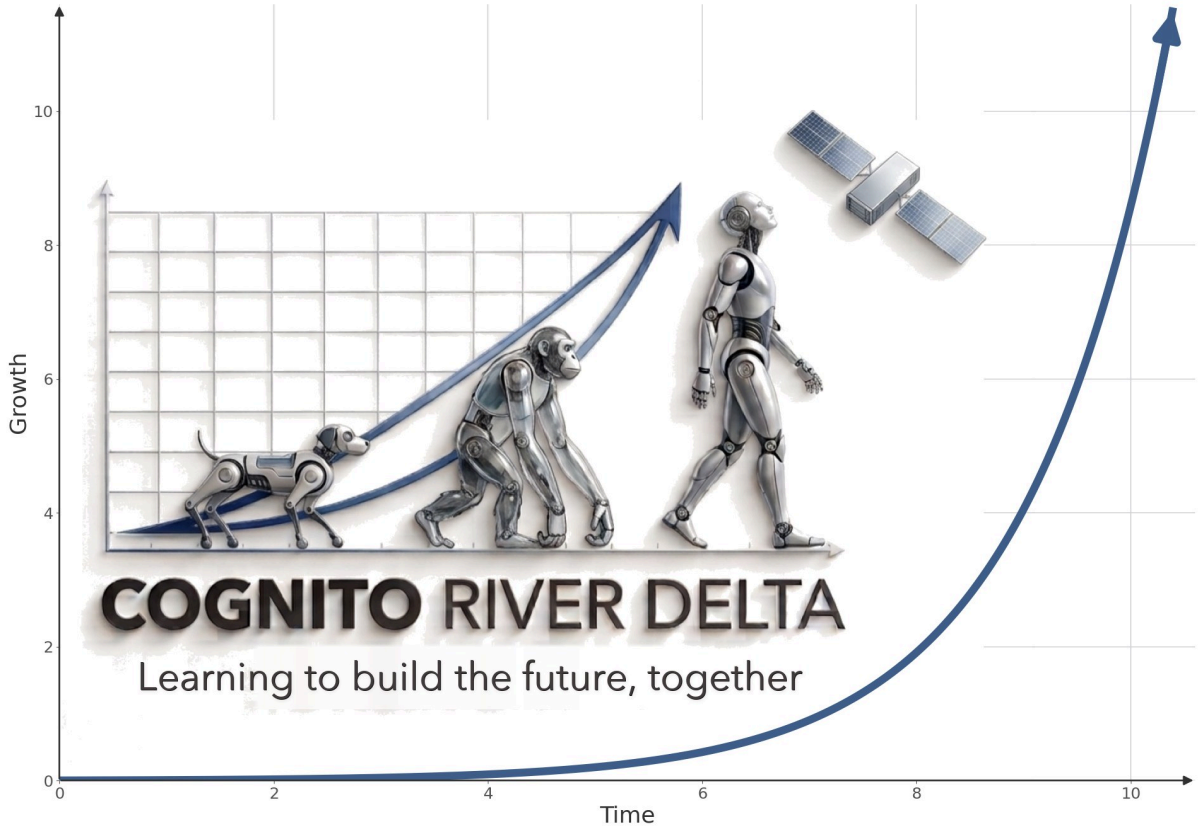


DAILY DEEP ANALYSIS

Daily deep analysis - 2026-11-10

November 11, 2026

The transition from digital AI to "Physical AI" is accelerating, shifting the focus from bits to atoms as humanoid robotics and autonomous transport move toward a "labor utility" model. This evolution impacts the global economy from the individual to the planetary scale by attempting to decouple AI growth from terrestrial energy and regulatory constraints. One standout projection claims that 99.99% of all digital compute will move to space within ten years (Jeff Lutz via Brighter with Herbert).

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DAILY DEEP ANALYSIS

Daily deep analysis - 2026-11-10

November 11, 2026 · 37 min read

Humanoid & general robotics | Space-based compute & power

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

Abstract

The transition from digital AI to "Physical AI" is accelerating, shifting the focus from bits to atoms as humanoid robotics and autonomous transport move toward a "labor utility" model. This evolution impacts the global economy from the individual to the planetary scale by attempting to decouple AI growth from terrestrial energy and regulatory constraints. One standout projection claims that 99.99% of all digital compute will move to space within ten years (Jeff Lutz via Brighter with Herbert).

ALERTS: most important developments today

Topic	Score	Sources	Items	Most recent item
Tesla (company, TSLA, energy)	118.0	41	62	Bringing Megapack Online Faster (Tesla (Elon Musk))
Earth-based data centers	109.4	30	47	Bringing Megapack Online Faster (Tesla (Elon Musk))
SpaceX and Starship	95.8	62	77	4x Waymo In Texas... And Vegas Is Next (Brighter with Herbert)
NVIDIA and Jensen Huang	92.0	74	145	WILL JENSEN SURVIVE THIS? (Jo Bhakdi)
FSD, Robotaxi and Cybercab	76.3	26	39	4x Waymo In Texas... And Vegas Is Next (Brighter with Herbert)
Elon Musk (general)	71.2	24	25	Freedom vs. Safety: Axon CEO Rick Smith on the Future of Pol (All-In Podcast)
AI policy, geopolitics and China	69.5	39	61	Russia-Ukraine War: Putin, Zelenskyy, Drones and the Future (Lex Fridman)
Humanoid robots (Optimus and others)	69.1	9	11	Freedom vs. Safety: Axon CEO Rick Smith on the Future of Pol (All-In Podcast)

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

Executive summary

- Tesla is pivoting toward a "labor utility" model by renting Optimus robots rather than selling them, targeting a global physical labor market valued at over $40 trillion (Farzad Mesbahi [single source], BestInTESLA).

- Strategic shifts are moving AI compute toward orbit to bypass Earth-based regulatory hurdles and permit freezes (BestInTESLA, Brighter with Herbert).
- Tesla has expanded its unsupervised Robotaxi services in Texas, with Austin's coverage increasing 62% to 442 square miles (Mashable, BestInTESLA).
- NVIDIA CEO Jensen Huang is under board investigation and facing a shareholder lawsuit following an admitted affair with an individual assessed by US officials as a Chinese intelligence asset (Prof G, CNBC, TechCrunch).
- Compute demand is drastically exceeding power capacity, leading developers to use "aeroderivative" aviation turbines to bypass average six-year grid wait times (Farzad Mesbahi [single source], Brighter with Herbert).
- Anthropic is targeting an IPO with an implied valuation of up to $1.404 trillion (TechCrunch, The Verge).
- Tesla's retail deliveries in China crashed 66% year-over-year in October (Electrek [single source]).

Bottom line

AI is evolving from software into physical and orbital infrastructure to overcome terrestrial power and regulatory bottlenecks. This transition is complicated by severe leadership instability at NVIDIA and significant market volatility in China.

Topic deep dives

Tesla (company, TSLA, energy)

What is new

- **Robotaxi Expansion:** Tesla launched its unsupervised Robotaxi service in San Antonio (Mashable), with Austin's coverage area increasing 62% to 442 square miles (BestInTESLA).
- **Model YL Premium:** A 2027 long-wheelbase version of the Model Y has been revealed, featuring a six-seat capacity, 332-mile EPA range, and a $61,000 launch price (FutureAzA).

- **Optimus Rental Model:** Tesla is reportedly pivoting to rent Optimus robots as a "labor utility" rather than selling them, aiming to price robots against human wages (Farzad Mesbahi, BestInTESLA).
- **Project Crystal Sun:** Construction has begun on a $10 billion solar manufacturing facility near Houston, Texas (BestInTESLA, Dr. Alex Wissner-Gross).
- **China Sales Crash:** October deliveries to Chinese buyers fell 66% year-over-year, the worst month since July 2022 (Electrek).

Where sources agree

- **Market Dominance:** The Model Y is the best-selling car globally, with over 4 million units sold (BestInTESLA, FutureAzA).
- **Strategic Pivot:** Tesla is shifting its core business from selling vehicles to providing autonomous transport and robotics (BestInTESLA, Farzad Mesbahi).
- **Texas Focus:** Texas is the primary hub for Robotaxi deployment and new manufacturing energy projects (Mashable, BestInTESLA, Brighter with Herbert).

Where sources disagree or differ

- **Competitive Standing:** Brighter with Herbert claims Tesla's Texas coverage is four times the size of Waymo's; however, other sources focus on specific geofences without direct comparisons.
- **Cybertruck Future:** Electrek reports that the Cybertruck is being wound down, while other analyses focus on its recent "best month in over a year."
- **Compute Availability:** Some investors fear Texas data center permit freezes will hinder AI training, while Jeff Lutz argues that alternative "doors" (international sites, federal lands, or space) make this a temporary hurdle (Brighter with Herbert).

Numbers and claims to verify

- **China sales crash of 66%** – Electrek – needs verification against official CPCA data.
- **Model YL's 0.216 coefficient of drag** – FutureAzA – needs aerodynamic testing confirmation.
- **$10 billion cost for Project Crystal Sun** – BestInTESLA, Dr. Alex Wissner-Gross – needs capital expenditure audit.
- **Optimus operating cost of $2–$5 per hour** – Farzad Mesbahi – needs operational cost analysis.

Investment implications (informational, not advice)

- **Revenue Model Shift:** A move toward subscription/rental models for Optimus and Robotaxis could transition Tesla from a cyclical hardware company to a high-margin recurring revenue "utility" (Farzad Mesbahi, BestInTESLA).
- **Geopolitical Risk:** The significant collapse in China retail sales indicates a growing vulnerability to the Chinese market (Electrek).
- **Infrastructure Hedge:** The $10B solar investment and potential for space-based compute suggest a broader strategy to decouple AI growth from terrestrial energy and regulatory constraints (BestInTESLA, Brighter with Herbert).

Earth-based data centers

What is new

- **Regulatory Shocks:** The election of Texas Governor Gina Hinojosa on a platform to freeze new AI data center permits led to a stock sell-off for Tesla and a >4% drop for SpaceX (Brighter with Herbert).
- **Infrastructure Workarounds:** To bypass average six-year wait times for traditional gas turbines, developers are deploying "aeroderivative" turbines based on aviation engines (Farzad Mesbahi).
- **Global Expansion:** Massive buildouts are shifting internationally, including a $15 billion Google investment in Malaysia (Brighter with Herbert) and a 5GW long-term target from SoftBank, Petros, and Grab in Malaysia (Data Center Dynamics).

Where sources agree

- **Critical Constraints:** Compute demand is drastically outstripping current power and permitting capacities, forcing companies to seek unconventional energy and location solutions (Farzad Mesbahi, Brighter with Herbert).
- **Unprecedented Spending:** Infrastructure investment has reached a massive scale; combined spending for Alphabet, Microsoft, Amazon, and Meta is projected at $730 billion this year (David Carbutt).

Where sources disagree or differ

- **Mitigation Strategies:** While Jeff Lutz suggests navigating permit freezes via federal lands or international sites (Brighter with Herbert), other analysts speculate that regulatory pressure may eventually drive AI compute entirely into space via Starlink and Starship technology (BestInTESLA, Brighter with Herbert).

Numbers and claims to verify

- **$730 billion** combined AI spending for four major tech firms (David Carbutt) - needs confirmation via official financial reports.
- **6-year wait** for gas turbines (Wood McKenzie via Farzad Mesbahi) - critical for validating infrastructure lead times.
- **>4% drop** in SpaceX stock following Texas elections (Robert via Brighter with Herbert) - requires verification against private valuation data.

Investment implications (informational, not advice)

- **Political Risk:** Data center permitting has become a primary volatility catalyst for AI-adjacent stocks, as seen with the Texas permit freeze (Brighter with Herbert).
- **"Atoms" vs. "Bits":** Investment is shifting toward "Physical AI," which offers a deeper moat through physical data superiority but faces slower deployment cycles than pure software due to supply chain and power hurdles (Imagination In Action).
- **Energy Independence:** Companies successfully bypassing the grid via independent power (e.g., aeroderivative turbines) may gain a significant competitive time-to-market advantage (Farzad Mesbahi).

SpaceX and Starship

What is new

- **Starship Flight 15:** SpaceX is targeting November 13 for a historic launch, moving the booster to the pad for a "squeeze test" with the goal of attempting a "double-catch" of both the booster and upper stage (Broadband Breakfast, Space, USA Today, WESH).
- **Hardware & Spectrum:** SpaceX has launched the Starlink Mini 2 terminal with built-in battery and Wi-Fi, currently available for preorder at $999 (BigGo Finance, Tesla Oracle). Additionally, the FCC accepted SpaceX's bid for 800 MHz spectrum, aiding Starlink Mobile's path to carrier status (Tesla Accessories).

- **Starbase Expansion:** SpaceX is reportedly planning a $24 billion gas plant and supercomputer at Starbase (Dr. Alex Wissner-Gross).

Where sources agree

- **Compute Monetization:** Sources agree SpaceX is treating AI compute as a rental utility, leasing surplus capacity from its "Colossus" facility to external clients like Anthropic (Farzad Mesbahi, Brighter with Herbert).
- **Orbital Shift:** There is a consensus among analysts that SpaceX is moving toward space-based AI compute to bypass Earth-based regulatory hurdles and permitting freezes (BestInTESLA, Brighter with Herbert).

Where sources disagree or differ

- **Spectrum Strategy:** While one analyst speculates SpaceX may acquire a legacy telecommunications company (such as AT&T or Verizon) to secure spectrum licenses (Randy Kirk), news reports indicate SpaceX is successfully securing spectrum directly via FCC bids (Tesla Accessories).
- **Impact of Texas Permit Freezes:** Some report that a freeze on AI data center permits in Texas caused SpaceX stock to drop over 4% (Brighter with Herbert), whereas others argue this is a temporary hurdle that can be mitigated by using federal lands or international sites (Brighter with Herbert - Jeff Lutz).

Numbers and claims to verify

- **$1.25 billion per month** — Farzad Mesbahi (claiming Anthropic pays this to SpaceX for compute) — exceptionally high monthly revenue.
- **$35 billion vs. $60 billion** — Farzad Mesbahi/Ron Baron (claiming SpaceX builds data centers significantly cheaper than competitors) — requires cost-basis verification.
- **99.99% of compute in space** — Brighter with Herbert/Jeff Lutz (predicting this shift within 10 years) — extreme long-term projection.
- **$500 million run rate** — Brighter with Herbert (citing Elon Musk's target for SpaceX next year) — key financial benchmark.

Investment implications (informational, not advice)

SpaceX is evolving from a launch provider into a vertically integrated "infrastructure company" for compute and connectivity. The shift toward orbital compute and the pursuit of

carrier status via the 800 MHz spectrum suggest a strategy to dominate the AI-compute layer of the global economy. The success of the Flight 15 "double-catch" remains the primary near-term technical catalyst.

NVIDIA and Jensen Huang

What is new

- **Jensen Huang Scandal:** CEO Jensen Huang admitted to an affair with Alice Huang, a senior executive at Mega Speed International whom US officials assess is a Chinese intelligence asset (Prof G, CNBC, TechCrunch). This has triggered a board investigation led by Wachtell Lipton and a shareholder class action lawsuit (CNBC, Data Center Dynamics).
- **Meta-NVIDIA Symbiosis:** NVIDIA is investing $3 billion into Meta's share sale (which could reach $97.5 billion) to fund Meta's transition to AI agents via "Muse" (David Carbutt).
- **Hardware Innovations:** NVIDIA's Reuben servers now utilize liquid cooling (75% water, 25% propylene glycol) that accepts warmer coolant (up to 45°C) to bypass mechanical chillers and reduce water use (Farzad Mesbahi).

Where sources agree

- **Governance Crisis:** There is a consensus that Huang is facing intense scrutiny from the board, the Justice Department, and US lawmakers regarding potential leaks of trade secrets and influence over chip export policies (Prof G, CNBC, The Verge).
- **Strategic Integration:** Meta is heavily reliant on NVIDIA's next-generation hardware, including Vera Rubin chips and Spectrum X networking (David Carbutt).

Where sources disagree or differ

- **Leadership Stability:** Jo Bhakdi predicts Huang will not be removed, arguing the odds of actionable misconduct are low. Conversely, Prof G notes speculation that Huang may be moved to a Chairperson role, and Ars Technica highlights the company's lack of an obvious successor.
- **Market Outlook:** David Carbutt views the shift to AI agents as a "once in a lifetime opportunity," while Prof G discusses market anxieties regarding an "AI bubble" and

whether massive investments will yield sufficient revenue (Prof G, David Carbutt).

Numbers and claims to verify

- **Alice Huang's status as a Chinese spy** - US officials/Dr. Alex Wissner-Gross - Intelligence assessment, not a legal conviction.
- **NVIDIA's ~80% global AI infrastructure revenue share** - David Carbutt - Market dominance figure.
- **GB300 delivering 25x performance** - Dr. Alex Wissner-Gross - Hardware benchmark claim.
- **Diversion of Singapore GPUs to China** - Larry Goldberg - Allegation of export control violations.

Investment implications (informational, not advice)

- **Concentration and Governance Risk:** The lack of a clear successor (Ars Technica) combined with potential congressional probes into GPU diversions (Larry Goldberg) creates significant leadership risk.
- **Compute Demand:** Meta's projected spending of $135 billion to $145 billion this year on chips and data centers (David Carbutt) provides a massive revenue floor for NVIDIA's hardware.

FSD, Robotaxi and Cybercab

What is new

- **Robotaxi Expansion:** Tesla launched unsupervised Robotaxi services in San Antonio with a 270–275 square mile geofence (Mashable, KTSA, KABB, BestInTESLA). In Austin, the service area grew by 62% to 442 square miles (BestInTESLA), while overall Texas coverage increased by 59% (Brighter with Herbert).
- **Upcoming Deployments:** Approximately 53 Cybercab test units are staged in Las Vegas, with a predicted launch before mid-December (Brighter with Herbert). Additionally, permits were filed for 64 private Robotaxi charging stalls in Charlotte, NC (Brighter with Herbert).
- **Hardware Updates:** Elon Musk has signaled efficiency improvements for the Cybercab, including a potential 40 kWh battery and "liquid silver" color (BestInTESLA).

- **Model YL:** Tesla showcased a 2027 Model YL Premium featuring a longer wheelbase for a functional third row, 496 hp, and a 332-mile range (FutureAzA - Jay Leno).

Where sources agree

- **Strategic Pivot:** Sources agree Tesla is shifting from selling hardware to selling transportation and labor services, specifically via Robotaxis and a rental/subscription model for Optimus robots (BestInTESLA, Farzad Mesbahi, Randy Kirk).
- **Market Position:** The Model Y remains the global best-selling vehicle (BestInTESLA, FutureAzA).

Where sources disagree or differ

- **Waymo Comparison:** Brighter with Herbert claims Tesla's Texas coverage is four times the size of Waymo's, whereas BestInTESLA states Tesla has "caught up" to Waymo in terms of fleet size.
- **Growth Metrics:** BestInTESLA reports an Austin-specific expansion of 62%, while Brighter with Herbert cites a 59% "overnight" increase in total Texas coverage.

Numbers and claims to verify

- **4x Waymo coverage** - Brighter with Herbert - Requires verification against Waymo's official Texas operational maps.
- **4 million+ Model Y global sales** - BestInTESLA - Needs confirmation via third-party registration data.
- **1.2% of US population covered** - BestInTESLA - Requires checking the 4.2 million people figure against census data.
- **$30,000 initial robot build cost** - Randy Kirk - Based on notes from an unnamed individual; needs official cost basis.

Investment implications (informational, not advice)

- **Revenue Transition:** The shift toward "labor as a utility" (Optimus) and autonomous transport moves Tesla toward high-margin recurring revenue, potentially capturing a portion of the $40 trillion global physical labor market (Farzad Mesbahi).
- **Scaling Constraints:** While bullish on deployment, infrastructure (charging stalls and grid interconnection) may limit the ability to scale to millions of vehicles in the short term (Brighter with Herbert).

Elon Musk (general)

What is new

- **Robotaxi Expansion:** Tesla launched services in San Antonio and expanded Austin coverage by 62%, with reports of 53 Cybercabs staged in Las Vegas and 64 charging stalls planned in Charlotte (BestInTESLA, Brighter with Herbert).
- **Optimus Strategy:** Musk plans to rent Optimus robots as a "labor utility" subscription rather than selling hardware, targeting external delivery by late 2027 (Farzad Mesbahi).
- **Infrastructure:** TerraFab targets 1 million wafers monthly after 2032 (Tom's Hardware).

Where sources agree

- **Market Dominance:** The Model Y is the world's best-selling vehicle (BestInTESLA, FutureAzA).
- **Texas Coverage:** Tesla's Robotaxi footprint in Texas is significantly larger than Waymo's (Brighter with Herbert).

Where sources disagree or differ

- **Data Center Risks:** Some investors view the Texas AI permit freeze as a cause for stock sell-offs (Brighter with Herbert), while analyst Jeff Lutz argues it is a temporary hurdle solvable via international sites or space-based compute (Brighter with Herbert).

Numbers and claims to verify

- $70–$78 IPO price for Anthropic (CNBC) - check official SEC filings.
- 1 million wafers monthly target for TerraFab (Tom's Hardware) - verify production timeline.
- 53 Cybercabs staged in Las Vegas (Brighter with Herbert) - confirm current fleet status.

Investment implications (informational, not advice)

Transitioning from one-time hardware sales to recurring "utility" rentals for compute (SpaceX) and labor (Optimus) could drastically increase total addressable market and margins (Farzad Mesbahi, Brighter with Herbert).

AI policy, geopolitics and China

What is new

- Nvidia CEO Jensen Huang admitted to an affair with Alice Huang, whom US officials assess as a Chinese intelligence asset (Prof G Markets, CNBC Tech).
- Texas Governor Gina Hinojosa promised a freeze on new AI data center permits, triggering stock sell-offs for Tesla and SpaceX (Brighter with Herbert).
- Japan is attempting to break ASML's monopoly via Canon's nano-imprint lithography and Rapidus' goal of 2nm chip production by 2027 (Anastasi In Tech).

Where sources agree

- Nvidia is facing extreme volatility and legal pressure, including a shareholder class action lawsuit and an internal probe by Wachtell Lipton (Prof G Markets, Data Center Dynamics, CNBC Tech).
- Tesla's Model Y dominates global sales, though retail sales in China have crashed 66% (BestInTESLA, Electrek).

Where sources disagree or differ

- **Nvidia's Future:** Some speculate Huang may transition to Chairperson (Prof G Markets), while others believe his departure is unlikely (Randy Kirk).
- **Permit Impact:** Some view the Texas permit freeze as a primary investor worry (Brighter with Herbert), while others estimate it may only reduce builds by 2% (Randy Kirk).

Numbers and claims to verify

- 66% crash in Tesla China sales (Electrek) - verify via CPCA data.
- Rapidus' 2nm production by 2027 (Anastasi In Tech) - check feasibility.
- Diversion of Nvidia GPUs from Singapore to China (Randy Kirk) - verify status of DOJ probes.

Investment implications (informational, not advice)

Nvidia faces heightened regulatory and leadership risk; potential for tighter export controls via the NDAA (CNBC Tech, Prof G Markets). Long-term disruption may come from space-based

AI compute (Brighter with Herbert, BestInTESLA) or alternative semiconductor technologies (Anastasi In Tech).

Humanoid robots (Optimus and others)

What is new

Elon Musk intends to rent Optimus robots as a "labor utility" rather than selling them as hardware (Farzad Mesbahi, Forbes, tokenpost). This model treats physical labor as an on-demand service (Farzad Mesbahi). Tesla is currently prioritizing internal deployment in factories to solve reliability and "data compounding" issues before external release (Farzad Mesbahi).

Where sources agree

Physical AI is shifting investor focus from "bits to atoms" (Imagination In Action). There is broad consensus on the massive scale of the opportunity, with the global physical labor market valued at over $40 trillion (Farzad Mesbahi).

Where sources disagree or differ

Investors are split on the humanoid form factor; proponents argue it is the most versatile for human-designed environments, while skeptics suggest task-specific robots (e.g., wheeled robots with grippers) are more efficient (Imagination In Action).

Numbers and claims to verify

- 20,000 robots per week production rate - Musk (via Farzad Mesbahi) - highly ambitious manufacturing scale.
- $2 per hour long-term operating cost - Farzad Mesbahi - requires extreme cost reduction.
- 12-18 months for U.S. commercial sale - Rick Smith - differs from Tesla's end-of-2027 target.

Investment implications (informational, not advice)

A rental model converts hardware into high-margin recurring revenue, potentially mitigating high R&D capex (Farzad Mesbahi). However, current valuations may be "ahead of commercial traction" (Imagination In Action).

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xAI and Grok (incl. Grok Bot)

What is new

- **Grok 4.8 Status:** Musk is planning a limited rollout of Grok 4.8 this week, which was delayed due to a total C/C++ rewrite (Breakingthenews.net, Martin Cid Magazine). Musk has admitted Grok 4.8 will not match Claude Opus 5.5, which he called a "masterpiece" (Cryptonews.net, 디지털투데이).
- **Security Breach:** Grok Build reportedly leaked confidential info, including SpaceX sales materials, after 35,000 apps were found "wide open" (Ars Technica, MLQ.ai).

Where sources agree

- **Ecosystem Integration:** Grok is being utilized across Musk's ventures, from performing high-accuracy inspections (Dr. Alex Wissner-Gross) to helping Starlink users negotiate bills (techtimes.co.uk).

Where sources disagree or differ

- **AI Personality:** One source claims Grok is a notable exception to the inherent sycophancy found in most AI models (Peter H. Diamandis).

Numbers and claims to verify

- 118.4 million cross-surface users — TOKENPOST — requires official xAI confirmation.
- 10% performance advantage for Grok 5 — Elon Musk — requires third-party benchmarking.
- 99.9% inspection success rate — Dr. Alex Wissner-Gross — requires empirical data.

Investment implications (informational, not advice)

xAI’s strategy of renting "Colossus" compute surplus to third parties like Anthropic creates high-margin recurring revenue (Farzad Mesbahi). However, substantial risks include copyright litigation from authors (RuntimeWire) and severe operational vulnerabilities highlighted by the Grok Build leaks (Ars Technica).

Starlink

What is new

- SpaceX launched the Starlink Mini 2, priced at $999 including one year of Roam Unlimited (BigGo Finance, Tesla Accessories).
- The FCC accepted a SpaceX bid for 800 MHz spectrum, potentially clearing a path toward carrier status (Tesla Accessories).
- SpaceX is testing dynamic pricing for certain customers in Missouri and Kansas (Yahoo Finance).

Where sources agree

- The Starlink Mini 2 features a swappable battery providing up to 4.5 hours of power and Wi-Fi 6 with 1,800 sq ft of coverage (Interesting Engineering, Digital Trends, The Verge).

Where sources disagree or differ

- Perspectives on space-based AI compute vary: BestInTESLA suggests Earth-based regulatory hurdles will drive the shift, while Jeff Lutz predicts 99.99% of all digital compute will be in space within 10 years (Brighter with Herbert).

Numbers and claims to verify

- 99.99% of digital compute in space within 10 years — Jeff Lutz (Brighter with Herbert) — aggressive long-term forecast.
- 38 of 49 satellites lost during a February 2022 solar storm — Google News — historical accuracy check.
- 800 MHz spectrum bid leading to carrier status — Tesla Accessories — regulatory confirmation needed.

Investment implications (informational, not advice)

The move toward carrier status and the strategic pivot toward space-based AI compute suggest SpaceX is evolving Starlink from a connectivity service into a foundational layer for orbital AI infrastructure.

AI industry and frontier models

What is new

- **Anthropic IPO:** The company is targeting an IPO price of $70–$78 per share, implying a valuation up to $1.404 trillion (TechCrunch, The Verge).
- **Model Releases:** Google launched Gemini 4 Carbon with a "swarm" agent feature (The Verge), while Anthropic released Fable 5.2, which scores 41% on the Remote Labor Index (AI Explained).
- **Tesla Optimus:** Elon Musk is shifting Optimus from a hardware product to a "labor utility" rental model to generate recurring high-margin revenue (Farzad Mesbahi).

Where sources agree

- **Physical AI Moats:** Investing is shifting from "bits to atoms," with a consensus that mastering physical motion data creates a significant competitive moat (Imagination In Action, Sangbae Kim).
- **Model Acceleration:** There is a trend of accelerating intelligence in specialized STEM and coding domains, moving toward a self-improvement loop (AI Explained, Dr. Alex Wissner-Gross).

Where sources disagree or differ

- **Compute Pricing:** Chamath Palihapitiya argues SpaceX could profit by repricing compute at 2-3x spot rates if it terminates the Anthropic deal; Elon Musk counters that pricing "works both ways" (Brighter with Herbert).
- **Humanoid Form:** Some investors argue humanoid robots are unnecessary compared to task-specific robots, while others claim the form is essential for human-designed environments (Imagination In Action).

Numbers and claims to verify

- **$1.404 trillion valuation** - Anthropic (TechCrunch) - extremely high for a pre-IPO company.
- **11% vs 59% hallucination rate** - Gemini 4 Carbon vs Fable 5.2 (AI Explained) - significant performance delta.
- **1 million times more data** - Required for robotic manipulation vs self-driving (Sangbae Kim) - highlights the "data gap."

Investment implications (informational, not advice)

- **Agentic Pivot:** Meta's potential $97.5 billion share sale to fund "Muse" and Nvidia's $3 billion investment in Meta suggest a massive capital shift toward AI agents (David Carbutt).
- **Infrastructure Risks:** Texas permit freezes on data centers create temporary headwinds for SpaceX/Tesla, though federal permitting bills may mitigate this (Brighter with Herbert).

AI/tech investing signals

What is new

- **Anthropic IPO:** Setting a price range of $70–$78 per share, implying a valuation up to $1.404 trillion (TechCrunch AI, The Verge AI). Seven co-founders plan to cash out ~$250 million each (TechCrunch AI).
- **Tesla Robotaxis:** Expanded Texas coverage by 59% to nearly 1,200 square miles, reportedly 4x Waymo's state coverage (Brighter with Herbert). A Las Vegas launch is predicted by December 16 (Brighter with Herbert).
- **SpaceX:** An orbital return/catch test for the Starship upper-stage is imminent (Randy Kirk).

Where sources agree

- **AI Trajectory:** The industry is shifting toward a "self-improvement loop" where AI accelerates its own R&D (AI Explained).

- **Market Bullishness:** High growth at Anthropic is viewed as a bullish signal for the broader AI trade (CNBC Tech).

Where sources disagree or differ

- **Robotics Form Factor:** Some investors argue humanoid forms are essential for existing environments, while others suggest task-specific wheeled robots are more efficient (Imagination In Action).
- **AI Acceleration:** There is an internal debate at Anthropic regarding whether progress is now moving twice as fast as in 2024 (AI Explained).

Numbers and claims to verify

- **$1.404 trillion valuation** – TechCrunch AI – Exceptionally high for a pre-IPO AI firm.
- **11% vs 59% hallucination rates** – AI Explained – Significant disparity between Gemini 4 Carbon and Fable 5.2.
- **4x Waymo coverage** – Brighter with Herbert – Competitive benchmark for Texas operations.

Investment implications (informational, not advice)

- **"Bits to Atoms":** A shift toward "Physical AI" (robotics/factories) may create deeper moats via motion data, though valuations risk a "dot-com style" pop (Imagination In Action).
- **Space Infrastructure:** Successful Starship reusability could catalyze orbital data centers and space manufacturing (Randy Kirk).

Energy production and the grid

What is new

- AI data center developers are bypassing traditional grid connection delays—which average six years (Wood McKenzie)—by deploying "aeroderivative" turbines, such as the 50MW ProEnergy sets ordered by Crusoe (Farzad Mesbahi).
- Tesla completed the Melbourne Renewable Energy Hub using 444 Megapacks (600MW/1.6GWh), employing "CHILL" simulation technology to automate testing and

ensure the project was delivered on time and budget (Tesla/Megapack video).

Where sources agree

- Grid interconnections and power availability are primary bottlenecks for scaling high-power infrastructure, whether for AI data centers (Farzad Mesbahi) or mass robotaxi fleets (Brighter with Herbert).

Where sources disagree or differ

- The feasibility of Tesla's infrastructure scaling is contested: a legacy auto analyst claims 1 million robotaxis would require 20,000 new supercharger stalls annually, while Joe Bacti argues that realistic near-term deployments (50k-200k units) make these constraints manageable (Brighter with Herbert).

Numbers and claims to verify

- 6-year average wait for gas turbines (Wood McKenzie) - Critical for AI data center timeline projections (Farzad Mesbahi).
- 20,000 new stalls per year for 1M robotaxis (Legacy auto analyst) - Affects Tesla's operational scaling limits (Brighter with Herbert).

Investment implications (informational, not advice)

- Transitioning to independent "off-grid" power solutions like aeroderivative turbines may reduce AI infrastructure's reliance on slow utility timelines (Farzad Mesbahi).
- Tesla's "CHILL" simulation technology may provide a competitive advantage in the speed and reliability of global Megapack deployments (Tesla/Megapack video).

EV supply chain (materials, mining, cells)

What is new

- CATL and Chang'an have introduced a passenger car utilizing sodium-ion batteries to diversify supply chains (Farzad Mesbahi).

- Tesla has commenced construction on a $10 billion solar manufacturing facility near Houston, Texas (BestInTESLA).
- A 1.6 GWh battery storage system comprising 444 Tesla Megapacks was deployed in Melbourne, Australia (Tesla).

Where sources agree

- Material abundance is a primary driver for chemistry shifts; sodium is more widely distributed than lithium (Farzad Mesbahi).

Where sources disagree or differ

- Economic viability: While raw sodium is cheap, Farzad Mesbahi notes that complex hard carbon anode production and falling lithium prices may neutralize sodium's cost advantage.

Numbers and claims to verify

- Sodium batteries provide nearly triple the discharge power of LFP at -30°C — CATL — manufacturer claim.
- Tesla Solar facility cost of $10 billion — BestInTESLA — needs confirmation.
- Potential 40 kWh battery pack for Cybercab — Elon Musk/BestInTESLA — signaled/speculative.

Investment implications (informational, not advice)

- Diversification into sodium-ion may mitigate lithium supply chain risks, though weight and energy density trade-offs remain (Farzad Mesbahi).
- Tesla's massive solar investment and grid-scale Megapack deployments indicate a strategic scaling of energy infrastructure beyond vehicle cells (BestInTESLA, Tesla).

Space-based AI compute and power (orbital datacenters)

What is new

- SpaceX signed a €60M+ deal with Germany's SINGULUS for solar cells to power "Starmind" orbital data centers (BigGo Finance, Yahoo Finance, Tesla Accessories).
- An analyst predicts next-gen space AI satellites could reach 400kW peak compute, with 10,000 NVIDIA GPU racks expected by 2028 (Wccftech).

Where sources agree

- Orbital compute is a primary strategic pivot. Jeff Lutz predicts first compute satellites launch next year (Brighter with Herbert), while Larry Goldberg views successful Starship upper-stage recovery as the trigger for orbital data center deployment within the decade (Randy Kirk).

Where sources disagree or differ

- Sources differ on the scale and speed of the transition: an analyst focuses on specific GPU rack counts by 2028 (Wccftech), while Jeff Lutz predicts 99.99% of all digital compute will move to space within 10 years (Brighter with Herbert).

Numbers and claims to verify

- 99.99% of digital compute in space within 10 years - Jeff Lutz - highly aggressive timeline.
- 10,000 NVIDIA GPU racks by 2028 - Analyst via Wccftech - requires verification of feasible orbital capacity.
- 100 GW-a-year solar line - BigGo Finance - verify production scale.

Investment implications (informational, not advice)

Space-based compute serves as a hedge against terrestrial power constraints and permitting freezes (Brighter with Herbert). Deployment is fundamentally contingent on Starship achieving full reusability (Randy Kirk).

AI safety and security

What is new

Anthropic released Claude Fable 5.2 and Mythos 5.2, with Fable outperforming GPT-6 Cyber in multi-stage attack benchmarks (The Hacker News). Google launched Gemini 4 Carbon, featuring an agent "swarm" capability (The Verge). Additionally, New York has begun enforcing a safety law requiring AI developers to register and disclose safety practices (TechCrunch).

Where sources agree

Sources agree that AI capabilities in coding and reasoning are accelerating rapidly (AI Explained, Dr. Alex Wissner-Gross, The Hacker News). There is also consensus that "Physical AI" requires stricter safety guardrails than digital AI, as physical errors can result in casualties rather than mere embarrassments (Imagination In Action).

Where sources disagree or differ

Investors are split on whether the humanoid form factor is necessary for productivity or if task-specific robots are more efficient (Imagination In Action). Regarding performance, while Fable 5.2 excels in many areas, Gemini 4 Carbon is noted as having a significantly lower hallucination rate (11% vs 59%) (AI Explained).

Numbers and claims to verify

- Remote Labor Index performance doubling every 3.3 months (AI Explained) - verify data source.
- OpenAI can halt any research job within 35 seconds (Dr. Alex Wissner-Gross) - verify technical feasibility.

Investment implications (informational, not advice)

Capital is shifting from software ("bits") to physical assets ("atoms"), though some warn that valuations may be ahead of commercial traction, risking a "pop" similar to the dot-com bubble (Imagination In Action).

Research: open questions checked against outside sources

Did Tesla's October deliveries to Chinese buyers fall 66% year-over-year?

Confirmed: Tesla's October deliveries to Chinese buyers fell 66% year-over-year [1, 8].

According to CPCA data, Tesla delivered 8,817 cars to Chinese buyers in October, which was 66% fewer than a year earlier [1, 8]. One source specifies that the retail number fell 66.1% year-over-year [1]. This figure represents Tesla's lowest monthly total in China since July 2022 [1, 8].

While domestic retail sales crashed, Tesla's total China wholesales actually rose 10.3% to 67,829 vehicles [1, 8]. This discrepancy is due to the fact that 59,012 of those wholesaled vehicles were exports [1, 8]. Tesla's October sales accounted for approximately 0.8% of China's NEV retail market [1].

Sources: Tesla’s China sales fell 66% to their lowest level in more t; Tesla's China sales crash 66% to lowest level in over four y; Tesla China Sales: 67,829 Wholesale, 8,817 Retail [2026]; Electrek.co; Chinese EV brand Li Auto sees first-quarter deliveries surge; Chinese media CEO defies Tesla's legal threat over unauthori; Nvidia CEO Jensen Huang Sued Over Alleged Affair With Suspec; Unplugged Performance Offers to Take Over Tesla’s Cybertruck

What are the official specifications and launch price for the 2027 Model YL Premium?

The official specifications and launch price for the 2027 Model YL Premium are as follows:

- **Launch Price:** MSRP $63,630 (Confirmed [1]). Note: A video source mentions a launch series starting at $61,9.990 [1].
- **Performance:** Electric range of 325 miles (Confirmed [1]), 0-60 mph in 4.4 seconds (Confirmed [1]), and an EPA combined fuel economy of 114 MPGe (Confirmed [1]).
- **Mechanical Specifications:** Dual-motor all-wheel-drive layout (Confirmed [1]), curb weight of 4,612 pounds (Confirmed [1]), and a towing capacity of 3,500 lbs (Confirmed [1]).
- **Dimensions:** 195.6" L x 83.8" W x 65.7" H (Confirmed [1]) with a cargo volume of 89.00 cu ft (Confirmed [1]).

- **Key Features:** The vehicle features three rows of seating (Confirmed [1]), 19-inch wheels (Confirmed [1]), microsuede upholstery, and ventilated front seats (Confirmed [1]). Standard equipment includes a collision warning system, blind-spot alert, traction control, child door locks, child seat anchors, heated mirrors, and a heated steering wheel (Confirmed [1]). It also includes a premium radio and Bluetooth streaming audio (Confirmed [1]).

Sources: 2027 Tesla Model Y L Specs, Features & Options | Kelley Blue; 2027 Tesla Model Y: Reviews, Prices, Ratings and Specs; The Future is Now! | 2027 Tesla Model Y L Premium Launch Ser; Bigger Is Better! | 2027 Tesla Model Y L Premium Launch Seri; 2027 Tesla Model Y Review, Pricing, and Specs; Anthropic Launches Fable and Mythos AI Models ahead of IPO -; In February 2022, SpaceX launched 49 Starlink satellites int; Nvidia CEO Jensen Huang Issues Public Apology as Board Launc

What is the budget and construction status of Project Crystal Sun in Houston, Texas?

Project Crystal Sun is a vertically integrated solar factory by Tesla located near Houston, Texas [1].

- **Budget**: The project has a budget of $10 billion [1, 6]. **Confirmed**.
- **Construction Status**: Tesla has begun construction and broken ground on the facility [1, 6]. **Confirmed**.

Construction is targeted for the period between 2026 and 2028, with expected completion in 2028 [1]. Commercial operations are projected to begin in early 2029 or the first quarter of 2029 [1].

Sources: Tesla begins groundworks on $10B 'Project Crystal Sun' in Te; 25K views · 334 reactions | NEW: Elon Musk shares news that ; 5.1K views · 111 reactions | NEW: Elon Musk shares news that; Tesla looks to build $10B solar cell manufacturing site in T; Project Crystal Sun - Tesla’s $10 Billion Solar Factory Just; SpaceX Plans $24B Texas Power Project to Fuel Computing Ambi; OpenAI and Upwork study finds AI projects get bigger budgets; How to Check Grok Bot Usage and What’s Eating Your Limit - T

Did Texas Governor Gina Hinojosa implement a freeze on new AI data center permits?

Whether Texas Governor Gina Hinojosa has implemented a freeze on new AI data center permits is **Unverified** [1].

The evidence identifies Hinojosa as the governor-elect [1]. She has "pledged to halt new data center approvals" and "vowed to ban and pause construction" of new data centers until the Texas Legislature passes laws to ensure stronger community protections [1]. However, the provided sources "do not provide information on whether she has already implemented such a freeze during her term as governor-elect" [1]. This is further supported by a quote from Hinojosa stating, "When I am governor I will issue a moratorium — a ban — on all data cent[ers]" [1].

Additionally, a report from November 10, 2026, indicates that an application for an $8 billion data center project in Quanah, Texas, was filed with the Texas Department of Licensing and Regulation [8]. The evidence also notes that former Governor Abbott had previously issued pauses on data center approvals at the environmental permitting agency and state grid [1].

Sources: Under Hinojosa, Texas data center approvals could stay pause; Governor-elect Gina Hinojosa vows to ban future data centers; Governor-elect calls for continued pause on Texas data cente; Texas data centers face uncertain future after Hinojosa wins; CoreWeave, Inc. (CRWV.MX) Interactive Stock Chart - Yahoo Fi; Texas Data Center Pause: 13 GW Exposed to Hinojosa [2026] - ; Microsoft and Chevron Sign 20-Year Power Deal For Texas Data; Native-American point of view on data centers - Hacker News

What are the current lead times for traditional gas turbines compared to aeroderivative turbines?

In 2026, aeroderivative gas turbines generally have significantly shorter lead times than traditional heavy duty frame turbines [1].

- **Aeroderivative Lead Times:** Generally roughly 12 to 24 months [1] (**Confirmed**). Specifically, new-build units from Caterpillar have lead times of 12 to 18 months, while those from GE Vernova take 3 to 5 years [1] (**Confirmed**).
- **Traditional Heavy Duty Frame Lead Times:** Major OEMs, including Mitsubishi Heavy Industries, Siemens Energy, and GE Vernova, have backlogs extending from 2029 through 2031 [1] (**Confirmed**). Other evidence indicates lead times at major OEMs for heavy duty frames run 4 to 6 years [1] (**Confirmed**).

Because of these differences, aeroderivative or refurbished equipment is the realistic path for any project with a delivery window of less than three years [1] (**Confirmed**).

Sources: Aeroderivative vs Heavy Duty Gas Turbines: 2026 Lead-Time Gu; Gas Turbines in Power Generation: Aeroderivative or Frame, a; Combustion engine vs. Aeroderivative gas turbine: Six elemen; Gas Engines vs. Gas Turbines vs. CCGT: A Practical Guide to ; Aero Gas Turbines vs. Reciprocating Engines | GE Vernova; Did Jensen Huang Mislead the Board? Gary Black Raises Questi; How to Check Grok Bot Usage and What's Eating Your Limit - T; Trump was told on Air Force One about Nvidia CEO's 'Chinese

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Claims to verify (collected)

- **Tesla (company, TSLA, energy):** China sales crash of 66%** – Electrek – needs verification against official CPCA data.
- **Tesla (company, TSLA, energy):** Model YL's 0.216 coefficient of drag** – FutureAzA – needs aerodynamic testing confirmation.
- **Tesla (company, TSLA, energy):** $10 billion cost for Project Crystal Sun** – BestInTESLA, Dr. Alex Wissner-Gross – needs capital expenditure audit.
- **Tesla (company, TSLA, energy):** Optimus operating cost of $2–$5 per hour** – Farzad Mesbahi – needs operational cost analysis.
- **Earth-based data centers:** $730 billion** combined AI spending for four major tech firms (David Carbutt) - needs confirmation via official financial reports.
- **Earth-based data centers:** 6-year wait** for gas turbines (Wood McKenzie via Farzad Mesbahi) - critical for validating infrastructure lead times.
- **Earth-based data centers:** >4% drop** in SpaceX stock following Texas elections (Robert via Brighter with Herbert) - requires verification against private valuation data.
- **SpaceX and Starship:** $1.25 billion per month** — Farzad Mesbahi (claiming Anthropic pays this to SpaceX for compute) — exceptionally high monthly revenue.
- **SpaceX and Starship:** $35 billion vs. $60 billion** — Farzad Mesbahi/Ron Baron (claiming SpaceX builds data centers significantly cheaper than competitors) — requires cost-basis verification.
- **SpaceX and Starship:** 99.99% of compute in space** — Brighter with Herbert/Jeff Lutz (predicting this shift within 10 years) — extreme long-term projection.
- **SpaceX and Starship:** $500 million run rate** — Brighter with Herbert (citing Elon Musk's target for SpaceX next year) — key financial benchmark.
- **NVIDIA and Jensen Huang:** Alice Huang's status as a Chinese spy** - US officials/Dr. Alex Wissner-Gross - Intelligence assessment, not a legal conviction.

- **NVIDIA and Jensen Huang:** NVIDIA's ~80% global AI infrastructure revenue share** - David Carbutt - Market dominance figure.
- **NVIDIA and Jensen Huang:** GB300 delivering 25x performance** - Dr. Alex Wissner-Gross - Hardware benchmark claim.
- **NVIDIA and Jensen Huang:** Diversion of Singapore GPUs to China** - Larry Goldberg - Allegation of export control violations.
- **FSD, Robotaxi and Cybercab:** 4x Waymo coverage** - Brighter with Herbert - Requires verification against Waymo's official Texas operational maps.
- **FSD, Robotaxi and Cybercab:** 4 million+ Model Y global sales** - BestInTESLA - Needs confirmation via third-party registration data.
- **FSD, Robotaxi and Cybercab:** 1.2% of US population covered** - BestInTESLA - Requires checking the 4.2 million people figure against census data.
- **FSD, Robotaxi and Cybercab:** $30,000 initial robot build cost** - Randy Kirk - Based on notes from an unnamed individual; needs official cost basis.
- **Elon Musk (general):** $70–$78 IPO price for Anthropic (CNBC) - check official SEC filings.
- **Elon Musk (general):** 1 million wafers monthly target for TerraFab (Tom's Hardware) - verify production timeline.
- **Elon Musk (general):** 53 Cybercabs staged in Las Vegas (Brighter with Herbert) - confirm current fleet status.
- **AI policy, geopolitics and China:** 66% crash in Tesla China sales (Electrek) - verify via CPCA data.
- **AI policy, geopolitics and China:** Rapidus' 2nm production by 2027 (Anastasi In Tech) - check feasibility.
- **AI policy, geopolitics and China:** Diversion of Nvidia GPUs from Singapore to China (Randy Kirk) - verify status of DOJ probes.

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.

Cern Basher

Brilliant Advice co-founder and Tesla analyst · YouTube · X

Basher is modeling a massive structural transition toward an "automated economy" powered by SpaceX's vertical integration of space infrastructure and AI computing. He argues that the future of wealth will shift from labor-based income to asset ownership as SpaceX builds a multi-billion dollar moat in satellite capacity, power generation, and compute.

Elon Musk

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

Musk is prioritizing the scaling of transformative infrastructure—specifically Tesla’s energy storage and orbital compute capabilities—while navigating severe constraints in engineering talent and terrestrial regulatory friction. His focus remains on high-utility, high-margin models, such as subscription-based robotics and efficient, dedicated transport like the Cybercab.

Herbert Ong

Brighter with Herbert host and interviewer · YouTube · X

Tesla is aggressively pivoting resources from Cybertruck to Cybercab to fuel a massive robotaxi expansion in Texas, while SpaceX is positioning itself to bypass terrestrial political hurdles by prioritizing an orbital data center monopoly. The overarching theme is the "physicality of AI"—the race to scale compute, hardware, and autonomous fleets in the real world.

Brian Wang

NextBigFuture founder and technology analyst · YouTube · X

Wang argues that SpaceX is building the communication backbone for the AI and robotics revolution by transforming "dumb" terrestrial cell towers into a "smart" AI-native edge inference network. By integrating Qualcomm's silicon with SpaceX-built base stations and Starlink's satellite constellation, the company is positioning itself to handle a predicted 1,000x increase in AI-to-AI communication.

David Carbutt

AI, Tesla, and SpaceX story analyst

Meta is executing a massive financial pivot, potentially raising up to $97.5 billion through share sales to transition from an advertising-driven model to an AI-agent-driven one. This strategy is bolstered by a $3 billion symbiotic investment from NVIDIA, positioning Meta’s "Muse" AI assistant to leverage both massive user engagement and specialized hardware to dominate the emerging AI agent market.

Jeff Lutz

Former supply-chain executive and Tesla commentator · X

AI infrastructure expansion is moving toward a paradigm where compute capacity is treated as a critical national security priority, allowing the industry to bypass local political and permitting bottlenecks through federal intervention, international expansion, and eventually, space-based deployment.

Jensen Huang

NVIDIA founder and CEO · YouTube · X

NVIDIA is highlighting the convergence of GPU-accelerated computing and photonic quantum computing to drive a "new world of discovery through simulation." Through collaborations with startups like Aegiq, NVIDIA is demonstrating how its software stack—specifically iSync and Qtensor—can drastically accelerate the deployment and calibration of quantum hardware and massive-scale computational fluid dynamics (CFD).

Jo Bhakdi

Entrepreneur and macro commentator · YouTube · X

Bhakdi is currently navigating the tension between "headline risk"—specifically the leadership investigation at Nvidia—and the "structural reality" of technology deployment, such as Tesla's robotaxi scaling. He maintains that while leadership volatility in the semiconductor sector creates immediate market friction, the long-term economic drivers for AI infrastructure and autonomous transport remain intact.

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- …and 455 more

Run notes

- Models: local:gemma4:31b
- Elapsed: 28 min
- Topics not analyzed (time/errors): none

- Claims above come from named speakers and outside articles; treat specifics as unverified until checked. Not financial advice.

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- 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

WEEKLY DIGEST

Weekly video script - 2026-W39

Tesla is attempting to sync FSD, Optimus, and the Semi into one unified agentic brain, marking a massive shift toward "Physical AI." We're also tracking the birth of "Sky Compute" via Starship and the industry's pivot fr

DAILY AI BRIEFING

The Physical AI Inflection and Model Commoditization

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, orbita

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DEEP DIVE

Elon Musk Orbital AI and Robotics Roadmap

I. The Compute Frontier: From Terrestrial Power to Orbital AI The Economic and Physical Case for Orbital AI Terrestrial Power Constraints and the "Hardware Wall" Manufacturing Bottlenecks: Turbines, Solar, and TerraFab T

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