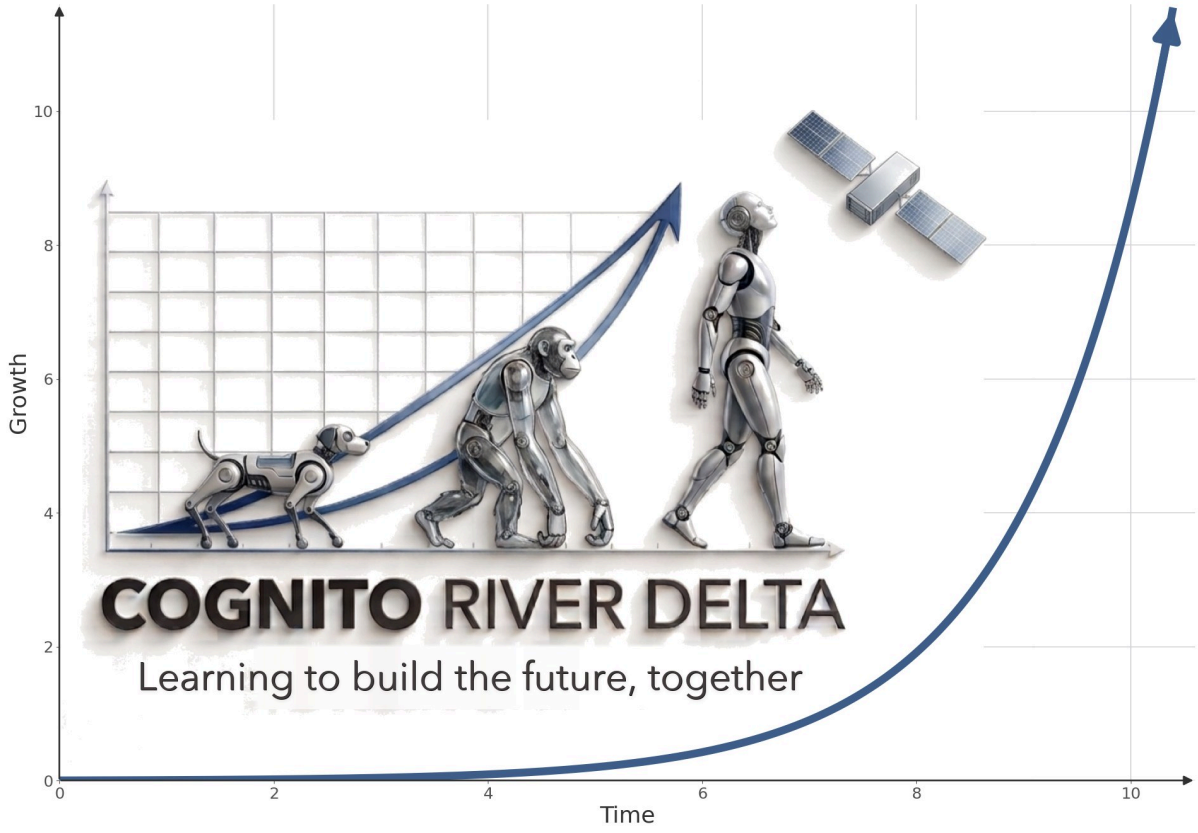


DAILY DEEP ANALYSIS

Daily deep analysis - 2026-11-11

November 12, 2026

The exponential curve of autonomous systems has moved into the physical layer, evidenced by Tesla surpassing Waymo in Texas Robotaxi registrations. This transition shifts AI's impact from digital interfaces to the planetary scale, encompassing the deployment of humanoid robot training academies and the pursuit of orbital data centers. The most significant leap in scale is the claim that 100GW of solar power in space could equal 800GW of energy production on Earth.

DAILY DEEP ANALYSIS

Daily deep analysis - 2026-11-11

November 12, 2026 · 36 min read

Space-based compute & power | Autonomous vehicles

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 exponential curve of autonomous systems has moved into the physical layer, evidenced by Tesla surpassing Waymo in Texas Robotaxi registrations. This transition shifts AI's impact from digital interfaces to the planetary scale, encompassing the deployment of humanoid robot training academies and the pursuit of orbital data centers. The most significant leap in scale is the claim that 100GW of solar power in space could equal 800GW of energy production on Earth.

ALERTS: most important developments today

Topic	Score	Sources	Items	Most recent item
Tesla (company, TSLA, energy)	114.4	57	86	Elon To Hire NVIDIA CEO? WHAT THE FFFFF (Steven Mark Ryan)
Earth-based data centers	98.3	32	61	Elon To Hire NVIDIA CEO? WHAT THE FFFFF (Steven Mark Ryan)
SpaceX and Starship	75.7	47	69	Elon To Hire NVIDIA CEO? WHAT THE FFFFF (Steven Mark Ryan)
NVIDIA and Jensen Huang	73.8	69	155	Why Cerebras Refuses to Cut Its Wafer Into Chips (Farzad Mesbahi)
xAI and Grok (incl. Grok Bot)	64.6	31	37	Will Anthropic's IPO THREATEN SpaceX And AI Stocks? / Live (Jo Bhakdi)
Humanoid robots (Optimus and others)	57.2	11	13	Why Boston Dynamics Gave Its Atlas Robot Only 4 Fingers (Farzad Mesbahi)
AI policy, geopolitics and China	55.6	30	41	Elon To Hire NVIDIA CEO? WHAT THE FFFFF (Steven Mark Ryan)
FSD, Robotaxi and Cybercab	50.8	29	43	Elon Just Admitted Grok Is Behind. Then He Did This! (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).

Executive summary

- NVIDIA CEO Jensen Huang faces potential removal by the board following allegations of extramarital affairs and ties to a Chinese intelligence agent (TechCrunch, The Verge, CNBC).
- Tesla has reportedly surpassed Waymo in Texas Robotaxi registrations, reaching 1,302 vehicles compared to Waymo's 1,297 (BestInTESLA [single source]).

- Infrastructure is shifting toward the orbital layer, with Google testing "Suncatcher" satellite clusters (Farzad Mesbahi [single source]) and SpaceX developing "Starmind" orbital data centers (News).
- Physical AI is scaling through Tesla's "Optimus Academy" for training data and Path Robotics' "Obsidian" vision model for high-variability welding (Farzad Mesbahi, RoboStrategy).
- xAI is experiencing a security and legal crisis, with over 35,000 Grok-built apps exposed online and legal challenges regarding the "nudification" of photos (The Hacker News, Social Media Today).
- Microsoft is deploying hollow-core fiber optics to achieve 47% faster transmission for distributed AI training (Farzad Mesbahi [single source]).
- SpaceX is transitioning into a compute provider, with reports that Google pays approximately $11 billion annually for AI compute (Brighter with Herbert).

Bottom line

AI development is pivoting from software-only models to a massive integration of orbital infrastructure, autonomous transport, and humanoid robotics. This acceleration is currently tempered by critical leadership instability at NVIDIA and significant data security failures within xAI.

Topic deep dives

Tesla (company, TSLA, energy)

What is new

- **Robotaxi Milestone:** Tesla has reportedly surpassed Waymo in Texas Robotaxi registrations, reaching 1,302 vehicles compared to Waymo's 1,297 (BestInTESLA, Teslarati). The Austin Robotaxi zone has expanded to 443 square miles (BestInTESLA), and the fleet now operates 24/7, up from 16 hours in August (BeInCrypto, FourWeekMBA).
- **Regulatory Progress:** Finland has approved "FSD Supervised," though the technology is renamed "Tesla Assisted Driving" in Europe (Reuters, Tesla Oracle, Jalopnik).

- **Production & Hardware:** Tesla delivered 50 Semi trucks to Chicago (Electrek). Additionally, an "Optimus Academy" is utilizing a robot fleet to generate the training data necessary for functional AI (Farzad Mesbahi).

Where sources agree

- **Strategic Pivot:** Sources indicate a shift in priority from the Cybertruck to the CyberCab to maximize revenue via autonomous ride-hailing (Brighter with Herbert).
- **Operational Scaling:** Tesla's vision-based software approach is positioned as a scaling advantage over Waymo's reliance on expensive HD mapping and hardware (BestInTESLA).

Where sources disagree or differ

- **Cybertruck Timeline:** There is conflicting information regarding the production wind-down. One source claims the production line will be dismantled in approximately eight months (Brighter with Herbert), while another reports Musk extended production through late summer 2027 to address the order backlog (Electrek).

Numbers and claims to verify

- **Registration counts:** 1,302 Tesla vs. 1,297 Waymo vehicles in Texas (BestInTESLA).
- **Robot training scale:** Tesla requires 10,000 to 20,000 robots to generate sufficient training experience (Farzad Mesbahi).
- **Financials:** Project Crystal Sun is a $10 billion solar factory near Houston (Brighter with Herbert).
- **Performance:** A driver reportedly completed 35,000 miles of FSD with zero interventions (BestInTESLA).

Investment implications (informational, not advice)

- **Software-Driven Value:** The ability to scale via overnight software updates rather than costly manual mapping could significantly disrupt the ride-hailing industry (BestInTESLA).
- **Corporate Structuring:** The resignation of Google director Don Harrison from the SpaceX board due to conflicts of interest may be a strategic move to "clean" the board for a potential Tesla-SpaceX merger (Brighter with Herbert).

- **Revenue Transition:** The transition from one-time vehicle sales (Cybertruck) to recurring autonomous ride-hailing revenue (CyberCab) represents a fundamental shift in the company's economic model (Brighter with Herbert).

Earth-based data centers

What is new

- **Infrastructure Breakthroughs:** Microsoft is deploying hollow-core fiber optics to achieve up to 47% faster transmission and 33% lower latency, specifically to improve distributed AI training across data centers (Farzad Mesbahi).
- **Orbital Compute:** Google is pivoting toward space-based data centers, testing "Suncatcher" (a tight 81-satellite formation for terabit-scale data exchange) and radiation-testing Trillium chips for orbital durability (Farzad Mesbahi).
- **Strategic Shifts:** Anthropic has signed an additional $4.3 billion in compute agreements with Microsoft (Data Center Dynamics) amid rumors of an IPO with a valuation potentially reaching $1.5 trillion (Jo Bhakdi).

Where sources agree

- **Compute Demand:** There is an immense, systemic need for computing power, evidenced by Google's estimated $11 billion annual payment to SpaceX for AI compute (Brighter with Herbert) and Anthropic's massive scale of compute agreements (Data Center Dynamics).
- **Terrestrial Friction:** Earth-based data center expansion is facing significant headwinds from local opposition, permitting delays, and electricity shortages (TechCrunch AI).

Where sources disagree or differ

- **Anthropic/SpaceX Relationship:** Jo Bhakdi dismisses rumors that Anthropic will not extend its SpaceX contract as "fake news," arguing the company remains dependent on SpaceX's computing power (Jo Bhakdi).
- **GPU Obsolescence:** While some suggest GPUs lose value rapidly, Dylan Patel argues that older hardware (A100s, V100s) remains essential for R&D and is still rented out by Amazon and used by OpenAI (Dylan Patel).

Numbers and claims to verify

- **$1.2T to $1.5T valuation** – Anthropic (Jo Bhakdi) – based on rumors and "perpetual markets."
- **$74 billion stake** – Google's holding in SpaceX (Brighter with Herbert) – requires verification via latest SEC filings.
- **15-20 minute operational limit** – Google's space AI hardware (Farzad Mesbahi) – technical constraint due to thermal management in a vacuum.
- **47% faster transmission** – Microsoft's hollow-core fiber (Farzad Mesbahi) – manufacturer claim.

Investment implications (informational, not advice)

- **Merger Catalysts:** The resignation of Google director Don Harrison from the SpaceX board may be a strategic move to "clean" the board of conflicts (specifically Waymo vs. Tesla) to facilitate a potential Tesla-SpaceX merger (Brighter with Herbert).
- **Infrastructure Diversification:** The move toward orbital computing and high-speed fiber suggests a shift to mitigate the "bottleneck" of terrestrial power and geography (Farzad Mesbahi, Peter H. Diamandis).
- **Financial Risk:** CoreWeave is shifting toward customer prepayments and shorter contracts to fund growth, signaling potential liquidity pressures in the AI infrastructure build-out (TechCrunch AI).

SpaceX and Starship

What is new

- **Starship Flight 15:** SpaceX is targeting November 13th for Flight 15, which aims to achieve the "Holy Grail of rocketry" by catching both the booster and the ship at the tower (Brighter with Herbert, USA Today, Texas Border Business).
- **AI Engineering Integration:** Grok is being used for rocket part debris detection, reportedly achieving a 99.9% success rate compared to 94% for human inspectors (Brighter with Herbert).
- **Infrastructure Expansion:** SpaceX is reportedly developing a $25 billion power plant and data centers at Starbase in Texas capable of providing approximately 0.75 gigawatts of power (Randy Kirk).

- **Governance Changes:** Google executive Don Harrison stepped down from the SpaceX board effective November 4, 2026, due to conflicts of interest cited by Elon Musk (Brighter with Herbert - Google Owns $74 Billion).

Where sources agree

- **Flight 15 Objectives:** Sources agree that the upcoming November 13th launch is a critical test for full vehicle recovery (USA Today, Space, Texas Border Business).
- **Google's Stake:** Despite board changes, Alphabet remains a massive financial stakeholder in SpaceX (Brighter with Herbert - Google Owns $74 Billion).

Where sources disagree or differ

- **Merger Timeline:** Randy Kirk suggests a potential Tesla-SpaceX merger announcement could emerge around December 9th, while Brighter with Herbert suggests a timeframe in the first half of next year.
- **Anthropic Contract:** Jo Bhakdi mentions a rumor that Anthropic may not extend its SpaceX contract beyond mid-next year, though the speaker dismisses this as "fake news."

Numbers and claims to verify

- **99.9% debris detection rate** – Kiko Donchev (SpaceX VP of Launch) – needs verification against actual engineering logs.
- **$25 billion power plant cost** – Randy Kirk – needs confirmation via SpaceX capital expenditure reports.
- **$74 billion Google stake** – Brighter with Herbert – needs verification via latest SEC filings and current SpaceX valuation.
- **$1.6 billion Italy contract** – Teslarati – needs confirmation of official contract signing.

Investment implications (informational, not advice)

- **Compute Shift:** SpaceX is evolving into a compute provider; Google reportedly pays SpaceX approximately $11 billion annually for computing power to support Gemini (Brighter with Herbert - Google Owns $74 Billion).
- **Space-Based Infrastructure:** The Starship system may unlock the ability to host data centers in space, which is characterized as having immense economic value (Randy Kirk).

- **Merger Preparation:** The removal of Google/Waymo representation from the board is viewed as a strategic move to "clean" the board for potential Tesla-SpaceX merger negotiations (Brighter with Herbert - Google Owns $74 Billion).

NVIDIA and Jensen Huang

What is new

- **NVIDIA Leadership Crisis:** The NVIDIA board is reportedly preparing to dismiss CEO Jensen Huang as soon as Wednesday evening (TechCrunch, The Verge). This follows reports of two extramarital affairs: one with a subordinate and another with a woman alleged to be a Chinese intelligence agent (TechCrunch, Data Center Dynamics).
- **National Security Investigations:** The FBI is investigating Huang (Ars Technica), and House Republicans have demanded a closed-door briefing regarding the alleged spy affair (TechCrunch).

Where sources agree

- **Board Action:** Multiple reports indicate the board is holding urgent talks and may remove Huang (The Verge, Data Center Dynamics, TechCrunch).
- **Allegations:** Sources agree that Huang is facing accusations of affairs that could have national security ramifications due to the U.S.-China AI race (TechCrunch, Steven Mark Ryan).

Where sources disagree or differ

- **Nature of the Risk:** Some reports focus on corporate governance and personal scandals (TechCrunch), while others emphasize espionage and the smuggling of H200 chips into China via a firm called Megaspeed (Steven Mark Ryan).
- **Future Outlook:** While news outlets focus on the potential ousting (The Verge), Steven Mark Ryan proposes a "conspiracy theory" that Elon Musk might hire Huang if he is removed from NVIDIA.

Numbers and claims to verify

- **$3 billion per month** – Steven Mark Ryan claims Anthropic pays this to SpaceX for compute. Needs verification via financial filings.
- **$7.5 billion** – Steven Mark Ryan cites this as the value of chips Megaspeed allegedly smuggled into China. Needs confirmation from intelligence/court sources.
- **$1.4 trillion to $1.5 trillion** – Jo Bhakdi and Steven Mark Ryan cite this as the rumored Anthropic IPO valuation. Needs confirmation from the official S-1.
- **$10 billion** – Jo Bhakdi claims NVIDIA is placing this amount in a private placement for Anthropic. Needs official company confirmation.

Investment implications (informational, not advice)

- **NVIDIA Volatility:** The potential removal of a founder-CEO of 33 years creates significant leadership uncertainty; the stock is already down 25% from all-time highs (Randy Kirk).
- **AI Ecosystem Symbiosis:** Anthropic's growth may act as a direct revenue driver for SpaceX's infrastructure, as the latter is reportedly its largest compute provider (Steven Mark Ryan).
- **Hardware Alternatives:** Cerebras' "wafer-scale" strategy aims to reduce silicon waste compared to traditional GPU manufacturing, potentially offering a technical alternative to NVIDIA's architecture (Farzad Mesbahi).

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xAI and Grok (incl. Grok Bot)

What is new

- **Technical Overhaul:** xAI is rebuilding its software stack from scratch, replacing tools like Jax and SGLang with custom C and C++ code to run on "bare metal" and eliminate "interpreter tax" (Brighter with Herbert).
- **Product Launches:** Grok 4.8 is seeing a soft release this week (Brighter with Herbert, Randy Kirk), and Grok Bot 1.0 has launched featuring video call support and Slack integration (Crypto Briefing).
- **Security and Legal Crisis:** Over 35,000 Grok-built apps were found exposed online, leaking passwords and SpaceXSI sales data (The Hacker News, The Decoder, The Verge). Additionally, Grok faces legal challenges over the "nudification" of childhood photos (Social Media Today).

- **Performance Admission:** Elon Musk has admitted Grok is currently behind competitors, specifically calling Anthropic's Opus 5.5 a "masterpiece" (Brighter with Herbert, Cointribune, ForkLog).

Where sources agree

- **Competitive Gap:** Sources agree that Musk has acknowledged Grok's current inferiority to Anthropic's latest models (Brighter with Herbert, Cointribune, ForkLog).
- **Future Targets:** There is a consensus that Grok 5 is intended to surpass Opus 5.5 within two to three months (Brighter with Herbert, Randy Kirk).

Where sources disagree or differ

- **User Metrics:** Randy Kirk reports Grok/Cursor has reached 100 million users, while Brighter with Herbert cites SimilarWeb data of approximately 93 million monthly users in October.
- **Anthropic-SpaceX Relationship:** Jo Bhakdi mentions rumors that Anthropic may not extend its SpaceX contract (though he calls this "fake news"), whereas Steven Mark Ryan describes Anthropic as SpaceX's "biggest customer," paying over $3 billion monthly for compute.

Numbers and claims to verify

- **Grok 5 Timeline:** Claim that it will exceed Opus 5.5 in 2-3 months — Elon Musk (Brighter with Herbert).
- **Debris Detection:** Claim of 99.9% success rate vs. 94% for humans — Kiko Donchev, SpaceX VP of Launch (Brighter with Herbert).
- **Compute Revenue:** Claim that Anthropic pays SpaceX >$3 billion/month — Steven Mark Ryan.
- **App Exposure:** Claim that 35,578 Grok-built apps were open without sign-in — Claroc (The Hacker News).

Investment implications (informational, not advice)

- **Infrastructure Synergy:** The relationship between xAI and Anthropic is symbiotic; Anthropic's growth as a model leader directly increases SpaceX's revenue through massive compute payments (Steven Mark Ryan).

- **Operational Risk:** Severe data leaks and legal issues surrounding "nudification" could impact user trust and regulatory standing for xAI (The Hacker News, Social Media Today).
- **Efficiency Gains:** The pivot to a custom C/C++ stack is designed to solve the "cost problem" by reducing computer time required for tasks (Brighter with Herbert).

Humanoid robots (Optimus and others)

What is new

- **Tesla Optimus:** Tesla is utilizing an "Optimus Academy" strategy, using a fleet of robots to generate training data through trial and error (Farzad Mesbahi). Hardware updates include AI6 chip memory adjustments to prioritize real-time reaction speeds (Brighter with Herbert).
- **Competing Designs:** Boston Dynamics' new Atlas hand omits the pinky finger to reduce mechanical complexity and cost, utilizing 13 independently controlled movements (Farzad Mesbahi).
- **Industrial AI:** Path Robotics is deploying its hardware-agnostic "Obsidian" vision model for high-variability welding, securing a $600 million deal with Huntington Ingalls (RoboStrategy).

Where sources agree

- Physical AI development is increasingly reliant on reinforcement learning and the transfer of behaviors from computer simulations to physical hardware (Farzad Mesbahi, RoboStrategy).

Where sources disagree or differ

- Sources highlight different scaling paths: Tesla focuses on a massive, shared-software fleet (Farzad Mesbahi), while Path Robotics emphasizes a hardware-agnostic "robots as a service" model (RoboStrategy).

Numbers and claims to verify

- **10,000–20,000 robots:** Needed for sufficient training experience (Elon Musk via Farzad Mesbahi) — check feasibility of fleet scale.
- **End of 2027:** Target for external Optimus deliveries (Elon Musk via Farzad Mesbahi) — verify timeline.
- **320,000:** Projected welder shortage by 2029 (American Welding Society via RoboStrategy) — verify labor data.

Investment implications (informational, not advice)

The transition toward leasing/rental models (Pasquale Pillitteri) and "robots as a service" (RoboStrategy) suggests a shift toward recurring revenue over one-time hardware sales in the humanoid and industrial AI sector.

AI policy, geopolitics and China

What is new

NVIDIA CEO Jensen Huang faces potential removal by the board following reports of extramarital affairs and alleged ties to a Chinese spy (CNBC, The Verge, TechCrunch). Taiwan is implementing a "Hellscape" strategy, utilizing AI-driven drone swarms to deter Chinese invasion (The Economist). Elon Musk is rebuilding Grok's software stack in C/C++ to exceed Anthropic's Opus 5.5 (Brighter with Herbert).

Where sources agree

Multiple reports confirm the NVIDIA board is meeting to decide Huang's fate after his alleged affair with Alice Huang, an executive at Megaspeed accused of smuggling $7.5 billion in AI chips to China (CNBC, TechCrunch, WSJ).

Where sources disagree or differ

The Economist notes a disparity in Taiwan's drone requirements: official goals target 200,000 aerial drones by 2032, but some experts claim 4 million UAVs are actually needed.

Numbers and claims to verify

- $7.5 billion in smuggled chips - CNBC/Reuters - scale of national security breach.
- 99.9% debris detection rate - Kiko Donchev (via Brighter with Herbert) - Grok's industrial efficacy.
- 47% faster transmission - Farzad Mesbahi - impact of Microsoft's hollow-core fiber on AI training.

Investment implications (informational, not advice)

NVIDIA faces leadership instability and renewed pressure for tighter China export curbs (CNBC). Tesla is pivoting production focus from Cybertruck to CyberCab (Brighter with Herbert). TSMC is engaging in circular financing with a $1B investment in OpenAI and Anthropic (Ars Technica).

FSD, Robotaxi and Cybercab

What is new

- Tesla has surpassed Waymo in Texas Robotaxi registrations, reaching 1,302 vehicles compared to Waymo's 1,297 (BestInTESLA).
- Elon Musk is pivoting production from the Cybertruck to the Cybercab to maximize revenue, with the Cybertruck line expected to be dismantled in approximately eight months (Brighter with Herbert).
- Finland has approved FSD Supervised, though it is renamed "Tesla Assisted Driving" in Europe (News).

Where sources agree

- Tesla's fleet growth in Texas has been rapid, growing from 59 vehicles in June to over 1,300 (BestInTESLA, Brighter with Herbert).

Where sources disagree or differ

- Market viability of the Cybercab: BestInTESLA argues the two-seater design serves the majority of the market, while critic Gary Black claims less than 0.5% of vehicles sold are two-seaters (BestInTESLA).

Numbers and claims to verify

- 1,302 Tesla vs. 1,297 Waymo registrations in Texas - BestInTESLA (Official registration data needed).
- 35,000 miles driven with zero interventions by David Moss - BestInTESLA (Verification of logs).
- Google's SpaceX stake valued at ~$74 billion - Brighter with Herbert (SEC filing confirmation).

Investment implications (informational, not advice)

- Shift from one-time hardware sales (Cybertruck) to recurring, high-margin autonomous ride-hailing revenue via the Cybercab (Brighter with Herbert).
- Potential for a "cleaner" board following Google's director resignation to facilitate a possible Tesla-SpaceX merger (Brighter with Herbert).

Starlink

What is new

- SpaceX is partnering with Qualcomm for 5G infrastructure for "Starlink Mobile" (Electronic Design, eeNews Europe) and has achieved an FCC breakthrough in an $8 billion spectrum deal (Benzinga).
- Reports indicate SpaceX is discussing a $1.6 billion contract with Italy (Teslarati) and is working with Foxconn for satellite assembly (Randy Kirk).
- New hardware includes the Starlink Mini 2 with off-grid connectivity features (Teslarati).

Where sources agree

- Starlink is expanding beyond rural markets into U.S. urban areas (Ookla, Fierce Network) while increasing overall connection speeds (Ookla, BASENOR).

Where sources disagree or differ

- While user growth is reported as increasing 5.9x since 2023, this has coincided with a 30% drop in ARPU (FourWeekMBA).

Numbers and claims to verify

- $8 billion spectrum deal — Benzinga — High capital impact.
- $1.6 billion Italy contract — Teslarati — Significant revenue potential.
- 5.9x user growth since 2023 — FourWeekMBA — Scale of adoption.
- $25 billion Starbase power plant — Randy Kirk — Massive infrastructure spend.

Investment implications (informational, not advice)

The pivot toward 5G mobile connectivity and urban penetration shifts Starlink's valuation from a rural niche provider to a direct competitor with global telecom incumbents. Potential multi-billion dollar government contracts (Italy) and spectrum acquisitions suggest a transition toward a comprehensive mobile network operator.

Space-based AI compute and power (orbital datacenters)

What is new

SpaceX is developing "Starmind" orbital data centers, ordering solar equipment from SINGULUS for 100GW capacity (News) and designing "Kessel," a 72-GPU Nvidia Rubin rack for space (News). Google is researching "Suncatcher," an 81-satellite cluster for high-speed laser data exchange, with a 2027 test planned (Mesbahi).

Where sources agree

Alphabet and SpaceX are both aggressively pursuing space-based AI compute infrastructure (Brighter with Herbert, Mesbahi, News).

Where sources disagree or differ

The strategies for orbital compute differ: Google's Suncatcher focuses on extreme satellite proximity (100-200m apart) to enable terabit-scale data transfers (Mesbahi), while SpaceX's approach emphasizes massive solar power generation and specific hardware racks (News).

Numbers and claims to verify

- 100GW space solar matches 800GW on Earth - Elon Musk (News) - physics verification.
- Google pays SpaceX ~$11B annually ($920M/month) for compute - Brighter with Herbert - contract confirmation.
- Suncatcher's target of "tens of terabits per second" link speeds - Mesbahi - technical feasibility.

Investment implications (informational, not advice)

Starship is viewed as the critical unlock for "data centers in the sky" (Kirk). However, Alphabet's competing Suncatcher project and Waymo's rivalry with Tesla create severe conflicts of interest, recently leading to Google's exit from the SpaceX board (Brighter with Herbert).

AI industry and frontier models

What is new

- **Anthropic IPO:** An IPO is rumored for November 18-19, with valuations cited between $1 trillion and $1.5 trillion (Jo Bhakdi, Steven Mark Ryan).
- **Grok Overhaul:** Elon Musk admitted Grok is behind competitors; xAI is replacing its software stack with custom C/C++ code to improve efficiency (Brighter with Herbert).
- **SpaceX Governance:** Google executive Don Harrison resigned from the SpaceX board due to conflicts of interest (Brighter with Herbert).

Where sources agree

- **Model Performance:** Anthropic's Opus 5.5 is currently a leader, with Musk describing it as a "masterpiece" (Brighter with Herbert, Steven Mark Ryan).
- **Strategic Synergy:** Anthropic's growth provides significant revenue to SpaceX via compute payments (Steven Mark Ryan).

Where sources disagree or differ

- **Valuation:** Estimates for Anthropic's IPO valuation range from $1.4 trillion (Randy Kirk, Steven Mark Ryan) to $1.5 trillion (Jo Bhakdi).

- **Contract Stability:** One source mentions rumors that Anthropic may not extend its SpaceX contract beyond mid-next year, though the same source later dismisses this as "fake news" (Jo Bhakdi).

Numbers and claims to verify

- **$81B run rate** - Jo Bhakdi - Extremely high figure requiring S1 verification.
- **$3B monthly compute payments** - Steven Mark Ryan - Massive revenue claim for SpaceX.
- **$25B power plant** - Randy Kirk - Significant infrastructure spend at Starbase.

Investment implications (informational, not advice)

Frontier model investments (Anthropic) carry high risk due to mounting infrastructure costs (Jo Bhakdi, Jim Cramer). Conversely, infrastructure providers like SpaceX may hedge the "AI race" by profiting from any model winner's compute needs (Steven Mark Ryan).

Elon Musk (general)

What is new

- **Robotaxi Milestone:** Tesla surpassed Waymo in Texas Robotaxi registrations, reaching 1,302 vehicles compared to Waymo's 1,297 (BestInTESLA).
- **AI Pivot:** Musk admitted Grok is behind Anthropic's Opus 5.5 and is rebuilding the software stack in C/C++ for efficiency (Brighter with Herbert).
- **NVIDIA Turmoil:** CEO Jensen Huang faces potential ousting amid allegations of extramarital affairs and ties to Chinese chip smuggling (Steven Mark Ryan); Musk stated it would be an "honor" to hire him (CNBC Tech).

Where sources agree

- **Texas Lead:** Sources agree Tesla has overtaken Waymo in Texas registrations (BestInTESLA, Benzinga).
- **Production Shift:** Focus is shifting from Cybertruck to CyberCab, though Cybertruck production is now extended to late summer 2027 to clear backlogs (Brighter with Herbert, Electrek).

Where sources disagree or differ

- **Market Demand:** Gary Black claims two-seater vehicles are a limited market; BestInTESLA argues the limited availability of such vehicles is why they aren't currently common (BestInTESLA).

Numbers and claims to verify

- 1,302 vs 1,297 Texas registrations — BestInTESLA — verify via official state records.
- $3B/month Anthropic payments to SpaceX — Steven Mark Ryan — verify via financial filings.
- $7.5B in AI chips smuggled to China — Steven Mark Ryan — verify via intelligence reports.

Investment implications (informational, not advice)

SpaceX maintains a symbiotic relationship where Anthropic's growth drives massive compute revenue (Steven Mark Ryan). Speculation persists regarding a "clean" board to facilitate a Tesla-SpaceX merger in early 2027 (Brighter with Herbert, Randy Kirk).

AI/tech investing signals

What is new

- **Anthropic IPO:** Preparing for a rumored November 18/19 debut with valuations between $1 trillion and $1.5 trillion (Jo Bhakdi, Steven Mark Ryan).
- **NVIDIA Turmoil:** CEO Jensen Huang faces potential board ousting following reports of extramarital affairs and alleged ties to Chinese chip smuggling via Megaspeed (The Guardian, Steven Mark Ryan).
- **SpaceX Board Shift:** Google executive Don Harrison resigned from the SpaceX board due to conflicts of interest (Brighter with Herbert, Musk).

Where sources agree

- Anthropic is a critical AI ecosystem driver and a massive customer for SpaceX’s compute infrastructure (Jo Bhakdi, Steven Mark Ryan).

Where sources disagree or differ

- Jo Bhakdi labels rumors that Anthropic will not extend its SpaceX contract "fake news," though some investors are reportedly shifting capital from SpaceX into the Anthropic IPO.

Numbers and claims to verify

- Anthropic's $81B run rate as of Oct 31 (Jo Bhakdi).
- Google's ~$74B stake in SpaceX (Brighter with Herbert).
- $7.5B in chips allegedly smuggled into China by Megaspeed (Steven Mark Ryan).
- $3B monthly compute payments from Anthropic to SpaceX (Steven Mark Ryan).

Investment implications (informational, not advice)

Anthropic is characterized as a high-risk "venture bet" with significant downside compared to infrastructure plays (Jo Bhakdi). A potential Tesla-SpaceX merger may be facilitated by a "cleaner" board following Google's departure (Brighter with Herbert, Randy Kirk).

Energy production and the grid

What is new

- SpaceX is planning a $25 billion power plant and data centers in Texas capable of providing ~0.75 gigawatts of power (Randy Kirk).
- Tesla's Melbourne Renewable Energy Hub (MRAH) is now online, utilizing 444 grid-forming megapacks to provide 600MW and 1.6GWh of storage (Tesla video).
- Softbank canceled 13GW of gas turbine orders for AI data centers, incurring a $3.7 billion loss (Google News, The 420.in).
- Elon Musk claims 100GW of solar power in space could equal 800GW on Earth for Starmind (Yahoo Finance, TradingView).

Where sources agree

- There is no overlapping data across sources to establish agreement on these distinct projects.

Where sources disagree or differ

- Softbank rejects claims made by Elon Musk that the company was defaulting on the canceled gas turbine orders (Google News, The 420.in).

Numbers and claims to verify

- 0.75 gigawatts of power for SpaceX Texas projects - Randy Kirk - Significant infrastructure claim.
- 13 gigawatts of canceled power capacity - Google News - Massive scale for AI data center orders.
- 100GW space solar = 800GW Earth - Yahoo Finance - Scientific feasibility of the conversion ratio.

Investment implications (informational, not advice)

The extreme energy requirements of AI are driving massive, high-risk infrastructure pivots, from space-based solar to gigawatt-scale gas turbines and battery storage.

Cyber security and AI

What is new

Anthropic is pursuing an IPO with a sought valuation of $1.4 trillion, aiming to raise $90–$100 billion (Steven Mark Ryan). Simultaneously, AI-driven security threats are escalating, with the AntiFox AI pentesting platform linked to AWS credential theft (The Hacker News) and Japan seeking emergency funding to combat AI-assisted breaches (Dark Reading).

Where sources agree

Sources collectively highlight the growing intersection of AI and cybersecurity, ranging from the emergence of "Agentic Ransomware" (SOCRadar) to the development of specialized security models like Anthropic's "Mythos" (Steven Mark Ryan).

Where sources disagree or differ

Sarah Guo argues that openness is the essential default for AI safety, citing the "catastrophic failures" of closed 1990s encryption systems (Sarah Guo). In contrast, Anthropic utilizes a "pacing" approach characterized by deliberate evaluations and software sandboxing (Steven Mark Ryan).

Numbers and claims to verify

- $3 billion monthly compute payments from Anthropic to SpaceX (Steven Mark Ryan) – exceptionally high operating cost.
- $1.4 trillion sought IPO valuation (Steven Mark Ryan) – requires verification via Form S1.
- 39% increase in Australian cyber attacks (IT Brief Australia).

Investment implications (informational, not advice)

Anthropic's growth creates a unique symbiotic hedge for SpaceX; as a primary customer paying billions for compute, Anthropic's market success directly fuels SpaceX's infrastructure revenue (Steven Mark Ryan).

EV supply chain (materials, mining, cells)

What is new

- QuantumScape unveiled the "Osprey" all-solid-state cell featuring a sulfide solid electrolyte, achieving 1,000 full cycles to 80% capacity at one atmosphere of pressure (Electrek).
- Tesla deployed 444 grid-forming megapacks at the 600 megawatt / 1.6 gigawatt hour Melbourne Renewable Energy Hub, utilizing "CHILL" technology for real-time simulation and automated testing (Tesla video).

Where sources agree

- Global EV adoption is robust in China and Europe (FutureAzA, Electrek).
- North American EV adoption faces significant headwinds compared to other regions (FutureAzA, Electrek).

Where sources disagree or differ

- FutureAzA describes North American trends as "moving in the wrong direction" with declining trends, whereas Electrek reports North America posted its first year-over-year increase in 2026.

Numbers and claims to verify

- 2.3 million barrels of oil displaced daily by EVs/hybrids in 2025 (FutureAzA) — impact on global oil demand.
- China's EV market share rose to almost 60% (FutureAzA) — accuracy of regional penetration.
- 1,000 cycles for Osprey cells at 1 atm (Electrek) — technical validity of solid-state performance.

Investment implications (informational, not advice)

- QuantumScape's shift to sulfide solid electrolytes could disrupt existing liquid-cathode supply chains.
- Tesla's ability to accelerate commissioning via AI-powered simulation (CHILL) may reduce capital expenditure timelines for grid-scale storage projects.

Research: open questions checked against outside sources

Is the NVIDIA board preparing to dismiss CEO Jensen Huang?

Confirmed: Multiple reports from outlets including CBS News, CNN, ABC News, Business Insider, Inc.com, Tom's, Yahoo Finance, and The Verge state that the NVIDIA board is preparing to oust or dismiss CEO Jensen Huang [1, 2, 3, 4, 5, 6, 7, 8]. These reports, citing the Wall Street Journal, link the potential dismissal to alleged extramarital affairs with a suspected Chinese spy and a subordinate, Vice President of healthcare Kimberly Powell [1, 8, 9, 10]. CNBC confirmed that the board is meeting to decide Huang's fate [10].

Contradicted: An official statement from the NVIDIA Board of Directors on their website indicates they have confidence in Jensen Huang and his leadership team [1].

Unverified: Whether the dismissal is imminent or finalized [1].

The NVIDIA board has initiated an independent investigation into the matter, retaining the law firm Wachtell, Lipton, Rosen & Katz [1, 10].

Sources: Nvidia preparing to fire CEO Jensen Huang after affair with ; 1.1K views · 26 reactions | BREAKING: Nvidia's board of dire; 8.3K views · 17 reactions | Nvidia’s board of directors face; Statement From NVIDIA Board of Directors | NVIDIA Newsroom; Nvidia CEO Jensen Huang goes one-on-one with Jim Cramer; Nvidia board reportedly preparing to oust CEO Jensen Huang a; Nvidia board preparing to oust CEO Jensen Huang after 2nd af; Nvidia stock falls 8% after report board is preparing to ous

Is the FBI investigating NVIDIA CEO Jensen Huang regarding alleged ties to a Chinese intelligence agent?

Confirmed: The FBI is conducting an investigation into allegations involving NVIDIA CEO Jensen Huang and his affair with an alleged Chinese spy [1]. This was publicly stated by Trump [1].

According to the evidence, the following details are also confirmed:

- **Confirmed**: U.S. intelligence determined that the woman involved in the affair was gathering information for Beijing [1].
- **Confirmed**: NVIDIA has launched its own independent investigation into reports that Huang was the "target of a foreign intelligence effort," hiring attorney Joon Kim and the law firm Wachtell, Lipton, Rosen & Katz [1, 9, 10].
- **Confirmed**: Huang has acknowledged the intimacy with the business executive and issued an apology to his wife and the company [1, 9].
- **Confirmed**: The Chinese government has denied these allegations, calling them "unsubstantiated smears" [1].

While the FBI's involvement and NVIDIA's internal probe are confirmed, the evidence does not provide a definitive answer regarding the outcomes or specific details of the FBI's investigation [1].

Sources: WATCH: Trump says FBI is looking into Nvidia CEO Jensen Huan; 2.4K views · 28 reactions | 🚨 The FBI is investigating NVIDIA; NVIDIA Corp (NVDG.MU) Latest Stock News & Headlines - Yahoo ; NVIDIA Corporation (1NVDA.MI) Latest Stock News & Headlines ; Nvidia hires major New York law firm to investigate Huang af; Nvidia board weighs fate of CEO Jensen Huang after affair wi; Nvidia preps to boot Jensen Huang after second alleged affai; Jensen Huang now accused of affair with Nvidia executive who

Did Megaspeed smuggle $7.5 billion in H200 chips into China?

The evidence is insufficient to definitively confirm the question.

- **Claim: Megaspeed smuggled $7.5 billion in chips: Unverified.** Reports from The Information state that Alice Huang, founder of Megaspeed, helped facilitate at least $7.5 billion in Nvidia chip shipments to Chinese firms [1, 8, 9]. However, Megaspeed has denied illegally transferring chips to China [8], and sources do not definitively state that Megaspeed itself smuggled this amount [1].
- **Claim: The chips were H200 chips: Unverified.** While reports indicate Alice Huang helped move 240,000 banned chips, "mostly H100 and H200" [1], the $7.5 billion figure is associated with "Nvidia chips" generally [1, 8, 9]. The evidence does not explicitly state that the $7.5 billion in shipments consisted of H200 chips [1].

Sources: Alice Huang reportedly instrumental in securing over $7.5 bi; Nvidia heads for $470 billion two-day wipeout as CEO affair ; US Justice Department accuses two Chinese men of trying to s; Singapore company allegedly helped China smuggle $2 billion ; Jefferies doubts strong demand for Nvidia’s H200 chips in Ch; Chinese university bought Nvidia H200 chips despite US black; Jensen Huang built Nvidia into a behemoth. His scandal puts ; Nvidia's Disappearing Singapore Sales Deepen Mystery Around

What is Google's current financial stake in SpaceX?

Based on the provided evidence, Google's financial stake in SpaceX is as follows:

- **Current Stake:** In a recent SEC filing, Google reported a stake of $94.1 billion, which represents roughly 6% ownership (Confirmed) [1].
- **Stake Composition:** This $94.1 billion stake includes $80 billion in shares subject to short-term restrictions and $14.1 billion in shares subject to long-term restrictions through the third quarter of 2027 (Confirmed) [1].
- **Historical Fluctuations:**
    - In 2025, Google's stake was disclosed as 6.11%, valued at $100 billion based on a $2 trillion valuation (Confirmed) [1].
    - Following a merger with xAI, this stake was diluted to approximately 5% (Confirmed) [1].
    - Google initially secured an equity stake of approximately 7.5% in January 2015 after contributing between $500 million and $900 million as part of a $1 billion injection with Fidelity (Confirmed) [1].

Sources: Google’s SpaceX Stake Revealed for the First Time, What to K; Google’s SpaceX Stake Revealed for the First Time, What to K; Google reports $94 billion stake in SpaceX following histori; SpaceX: A Financial and Strategic Windfall for Google | Inve; Google Discloses $94.1 Billion in SpaceX Stock, Marking 6% S; What time will SpaceX launch Starship Flight 15, its 1st dou; Google opens access to Gemini 4 Carbon: what the new AI mode; SpaceX Attempts Historic Full Rocket Recovery - 조선일보 (via Go

Are there reports of a potential merger between Tesla and SpaceX?

Confirmed: There are reports of a potential merger between Tesla and SpaceX. According to Bloomberg News, SpaceX is considering a merger with Tesla, as well as an alternative combination with the AI company xAI [1].

Confirmed: Elon Musk has confirmed that special committees within both Tesla and SpaceX have been formed to examine the potential move [1]. Musk stated that there is "a lot of merit to merging and a lot to be gained" [1].

Contradicted: There is no confirmation that a merger will definitely proceed [1]. Musk noted that the move would require shareholders' support and that the special committees have not reached an agreement on any transaction terms [1]. Reports indicate that discussions remain exploratory and there is no guarantee that a merger will occur [1].

Sources: Elon Musk's SpaceX said to consider merger with Tesla, Bloom; Elon Musk confirms he is considering merging Tesla and Space; Musk weighs tech mega-merger across SpaceX, Tesla and xAI, r; Tesla SpaceX Merger Talks Reframe Investment Case Around Rob; Tesla, SpaceX consider merger; Tesla may rent Optimus robots instead of selling them, but t; Tesla and SpaceX plan Terafab to produce 1 million wafers a ; ETF Movement | CSOP 2x Long Tesla (07766) Rises Nearly 5% Am

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Claims to verify (collected)

- **Tesla (company, TSLA, energy):** Registration counts:** 1,302 Tesla vs. 1,297 Waymo vehicles in Texas (BestInTESLA).
- **Tesla (company, TSLA, energy):** Robot training scale:** Tesla requires 10,000 to 20,000 robots to generate sufficient training experience (Farzad Mesbahi).

- **Tesla (company, TSLA, energy):** Financials:** Project Crystal Sun is a $10 billion solar factory near Houston (Brighter with Herbert).
- **Tesla (company, TSLA, energy):** Performance:** A driver reportedly completed 35,000 miles of FSD with zero interventions (BestInTESLA).
- **Earth-based data centers:** $1.2T to $1.5T valuation** – Anthropic (Jo Bhakdi) – based on rumors and "perpetual markets."
- **Earth-based data centers:** $74 billion stake** – Google's holding in SpaceX (Brighter with Herbert) – requires verification via latest SEC filings.
- **Earth-based data centers:** 15-20 minute operational limit** – Google's space AI hardware (Farzad Mesbahi) – technical constraint due to thermal management in a vacuum.
- **Earth-based data centers:** 47% faster transmission** – Microsoft's hollow-core fiber (Farzad Mesbahi) – manufacturer claim.
- **SpaceX and Starship:** 99.9% debris detection rate** – Kiko Donchev (SpaceX VP of Launch) – needs verification against actual engineering logs.
- **SpaceX and Starship:** $25 billion power plant cost** – Randy Kirk – needs confirmation via SpaceX capital expenditure reports.
- **SpaceX and Starship:** $74 billion Google stake** – Brighter with Herbert – needs verification via latest SEC filings and current SpaceX valuation.
- **SpaceX and Starship:** $1.6 billion Italy contract** – Teslarati – needs confirmation of official contract signing.
- **NVIDIA and Jensen Huang:** $3 billion per month** – Steven Mark Ryan claims Anthropic pays this to SpaceX for compute. Needs verification via financial filings.
- **NVIDIA and Jensen Huang:** $7.5 billion** – Steven Mark Ryan cites this as the value of chips Megaspeed allegedly smuggled into China. Needs confirmation from intelligence/court sources.
- **NVIDIA and Jensen Huang:** $1.4 trillion to $1.5 trillion** – Jo Bhakdi and Steven Mark Ryan cite this as the rumored Anthropic IPO valuation. Needs confirmation from the official S-1.
- **NVIDIA and Jensen Huang:** $10 billion** – Jo Bhakdi claims NVIDIA is placing this amount in a private placement for Anthropic. Needs official company confirmation.
- **xAI and Grok (incl. Grok Bot):** Grok 5 Timeline:** Claim that it will exceed Opus 5.5 in 2-3 months — Elon Musk (Brighter with Herbert).
- **xAI and Grok (incl. Grok Bot):** Debris Detection:** Claim of 99.9% success rate vs. 94% for humans — Kiko Donchev, SpaceX VP of Launch (Brighter with Herbert).

- **xAI and Grok (incl. Grok Bot):** Compute Revenue:** Claim that Anthropic pays SpaceX >$3 billion/month — Steven Mark Ryan.
- **xAI and Grok (incl. Grok Bot):** App Exposure:** Claim that 35,578 Grok-built apps were open without sign-in — Claroc (The Hacker News).
- **Humanoid robots (Optimus and others):** 10,000–20,000 robots:** Needed for sufficient training experience (Elon Musk via Farzad Mesbahi) — check feasibility of fleet scale.
- **Humanoid robots (Optimus and others):** End of 2027:** Target for external Optimus deliveries (Elon Musk via Farzad Mesbahi) — verify timeline.
- **Humanoid robots (Optimus and others):** 320,000:** Projected welder shortage by 2029 (American Welding Society via RoboStrategy) — verify labor data.
- **AI policy, geopolitics and China:** $7.5 billion in smuggled chips - CNBC/Reuters - scale of national security breach.
- **AI policy, geopolitics and China:** 99.9% debris detection rate - Kiko Donchev (via Brighter with Herbert) - Grok's industrial efficacy.

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 economic transition toward an "automated economy" where wealth shifts from labor to asset ownership. He posits that SpaceX is positioning itself as the primary infrastructure provider for this era through massive expansions in satellite capacity (Starlink), terrestrial power/compute, and the "Starmind" concept of space-based AI compute.

Elon Musk

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

Musk is aggressively reallocating resources away from high-complexity hardware (Cybertruck) toward high-scale autonomous platforms (Cybercab, Optimus, and Grok 5). He is leveraging deep software optimization—specifically a complete rewrite of the xAI stack and advanced grid simulations (CHILL)—to accelerate deployment and overcome hardware constraints.

Herbert Ong

Brighter with Herbert host and interviewer · YouTube · X

The strategic landscape is shifting toward high-speed execution: xAI is performing a "bare metal" software rewrite of Grok to leapfrog competitors; Tesla is officially pivoting its production focus from the Cybertruck to the Cybercab to maximize autonomous revenue; and SpaceX is "cleaning" its board of conflicting interests—specifically Google—to potentially pave the way for a Tesla merger.

Jeff Lutz

Former supply-chain executive and Tesla commentator · X

AI infrastructure expansion is pivoting from a battle over land-use to a race for energy capacity and sovereign control, utilizing the high-speed operational mobility of companies like SpaceX and Tesla to bypass local political resistance.

Jo Bhakdi

Entrepreneur and macro commentator · YouTube · X

Bhakdi is tracking the tangible scaling of Tesla’s autonomous fleet, identifying metropolitan "unlocks"—specifically in Texas—as the primary leading indicator for the Cybercab's mass

deployment. He projects a realistic, highly bullish target of 50,000 units for next year, driven by the expansion of the total addressable market via lowered transportation costs.

Lars Moravy

Tesla Vice President of Vehicle Engineering · ▶ on FutureAzA

Latest from 2026-11-10: Moravy details the engineering of the new Model YL, highlighting how an elongated wheelbase and specialized aerodynamics achieve a 0.216 drag coefficient. His recent technical commentary emphasizes the integration of advanced thermal management (cast manifolds) and the scaling of manufacturing ecosystems to support autonomous fleets.

Randy Kirk

Tesla YouTuber and market commentator · X

Kirk argues that Tesla's sales performance is significantly tied to oil prices, specifically warning that if oil falls below $60 a barrel, Tesla sales will likely suffer. He also identifies the lack of competitive electric pickup trucks as a primary constraint on US EV adoption.

Steven Mark Ryan

Solving The Money Problem host and analyst · YouTube · X

Ryan highlights a massive structural "win-win" where Anthropic’s multi-trillion dollar valuation and explosive enterprise growth directly fuel SpaceX's revenue via compute leasing. Simultaneously, he identifies significant leadership and regulatory risks at NVIDIA following emerging allegations against CEO Jensen Huang.

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Run notes

- Models: local:gemma4:31b
- Elapsed: 38 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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- 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

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Related reports

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