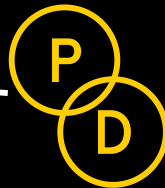


MIND CLUB

AI & TECHNOLOGY BRIEF



AI & Technology Intelligence

SIGNAL > NOISE · CAPABILITIES > HYPE · APPLICATION > CURIOSITY

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APPLE LOCKS THE FILE DRAWER, AND AI CHIPS GET THEIR OWN MORTGAGE

A quiet night for new models and a loud one for plumbing: Apple moved to fence in desktop agents, Anthropic put \$100M behind the people who deploy them, and the money for AI chips kept moving into debt and lease structures.

QQQ · FRI 10.02 749.53 DAY +1.0% YTD +22.0%	SMH (SEMIS) 630.75 DAY +2.1% YTD +75.2%	NVDA 233.99 DAY +1.4% INTRADAY RECORD 237.88	AVGO · MOVER 355.13 DAY +3.3% \$60B CHIP DEBT REPORT
MU 1,074.27 DAY -2.1% YTD +276%	UST 10-YEAR 5.28% +4 BP ON THE DAY PAYROLLS +29K	AI ROUNDS ≥\$100M \$150M IN WINDOW, VERIFIED \$350M INCL. PALEBLUEDOT	HYPERSCALER CAPEX \$720B+ 2026 GUIDE, BIG 4 PARTLY FROM REPORTING

Closes are Friday 10.02 last regular-session prints from Robinhood market data (the official settled bar had not posted at run time); day change vs the 10.01 close, YTD vs 12.31.2025. 10-year from the U.S. Treasury daily par yield curve.

VERIFICATION AT A GLANCE

CLAIM CHECK 7 5 match · 1 partial · 1 open	CALENDAR DATES 10/12 confirmed at the source	SOURCE WATCH 14 documents · first pull · 3 flags	OPEN CALLS 14 1 resolved · October scorecard to 10.31	CORRECTIONS 1 EO signing date, see 17B
--	--	--	---	--

#	THE FIVE THINGS TO KNOW	SOURCES	PRIORITY
01	Apple says apps will have to ask much harder before they can read everything on a Mac, citing misuse and the growing risk from AI agents. No date or macOS version yet.	CO PRESS	MUST READ
02	Anthropic commits \$100M to train 10,000 engineers who install Claude inside big companies. The bottleneck it's paying to fix is people, not model quality.	CO	MUST READ
03	AI chips are getting financed like buildings. A reported \$60B debt package for Broadcom chips bound for Anthropic, a reported \$8B Amazon GPU sale-leaseback, and a Firmus IPO priced at A\$11 seeking A\$7.1B.	PRESS	MUST READ
04	A weak jobs report cut October hike odds and semis rallied anyway. Payrolls +29,000; the 10-year still closed higher at 5.28%.	GOV DATA	KNOW IT
05	Xaira finally showed its hand: de novo antibodies against hard targets, in the dish. A 10% hit rate on XA-1; no animal or human data; zero registered trials.	CO REG	MUST READ

READING PRIORITY INDEX

MUST READ	Apple Full Disk Access · Anthropic Frontier Academy · Chip financing off the balance sheet · Xaira X-Design and its reality check · What can I use today
KNOW IT	Jobs report and the 10-year · Supabase buys Turso for agent databases · OpenAI safety departures and the pause · FieldAI \$700M report · Heat map · Claim Check · Calls ledger



HOW TO READ THIS BRIEF

MUST READ understand tonight. **KNOW IT** secondary. **SCAN** awareness only. **VERIFIED** a primary source was checked, **CLAIM** a company or press statement, **ANALYSIS** our interpretation, **SPECULATION** plausible but unverified. Red boxes are the red team.

Source badges show what each item rests on: **REG** a registry or filing (SEC, ClinicalTrials.gov, Federal Register, a court docket) **GOV** agency or government **PEER** peer-reviewed journal **PRE** preprint, not peer-reviewed **CO** company release, model card or pricing page **DATA** an independent benchmark, leaderboard or curated database **PRESS** journalism.

Claim Check verdicts compare a headline with its primary document: **MATCH** **PARTIAL** **MISMATCH** **OPEN** (no primary document found yet). A verdict says what differs, never why.

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THE DECODER

Three new words from tonight's brief. Words explained in earlier editions are underlined like this the first time they appear.

FDE

FORWARD-DEPLOYED ENGINEER

An engineer who sits inside a customer's team to make an AI tool actually work there: wiring it to the right systems, fixing the awkward cases, and teaching people to use it. Think of the expert who comes to your house to install the new kitchen, not the shop that sold it. Anthropic's version trains the customer's own engineers to play this role.

BIOTECH BRIDGE A field application scientist who installs the instrument and stays until the assay runs.

SEEN IN THE BRIEF Anthropic will spend \$100M to train 10,000 "Frontier Deployed Engineers" (item 02).

LEAST PRIVILEGE

PRINCIPLE OF LEAST PRIVILEGE

Give every app or agent only the keys it needs for its job and nothing more. A babysitter gets the front-door key, not the key to the safe, so a mistake or a trick can only open one door.

BIOTECH BRIDGE Role-based access in a validated system: the lab tech can enter results, not approve the batch.

SEEN IN THE BRIEF Apple's Full Disk Access change pushes Mac agents toward least privilege (item 01).

SALE-LEASEBACK / SPV

SPV: SPECIAL PURPOSE VEHICLE

A company sells something it owns (here, AI chips) to a separate little company set up just for that deal, the SPV, which investors fund. The seller then rents the chips back. It gets cash now and pays rent over time. The debt sits with the SPV, though the seller usually still records a lease obligation of its own.

BIOTECH BRIDGE Synthetic royalty financing: cash today, repaid from future sales.

SEEN IN THE BRIEF Amazon is reportedly in talks to move about \$8B of NVIDIA chips into an SPV and lease them back (item 03).



THE FIVE THINGS TO KNOW

Two stories about who controls agents, one about who pays for the chips, one about rates, and one about whether AI can design an antibody you'd want to dose.

01 Apple puts a deadbolt on the Mac's master key MUST READ

WHAT HAPPENED

Apple told developers it will require "very explicit user action" before an app can get Full Disk Access, the macOS permission that opens every file, plus Mail, Messages and browsing history. The notice names AI agents directly: "As AI agents become increasingly capable and autonomous, the risks associated with this level of access will grow substantially." It gives no date, macOS version or mechanism. VERIFIED

Coverage ties it to two recent episodes: a journalist's account that Meta's Muse Mac agent read private messages (Meta disputes it) and a reported flaw in the ChatGPT Mac app. CLAIM

WHY IT MATTERS

Apple says it will tighten an OS permission, citing current developer misuse and the growing risk from agents; nothing has changed on Macs yet. Desktop agents from every lab (Claude, ChatGPT, Codex, Copilot, Muse) lean on broad file access to be useful. If the new prompt is just scarier wording, little changes. If Apple limits which kinds of apps can hold the permission, agent makers may have to rebuild around narrower, per-folder access. ANALYSIS

WHAT BECAME POSSIBLE

Nothing new for users tonight. What changed is that "the agent can see everything" is now a risk the OS vendor states in writing, which is useful language for any vendor security review or board question about agents on company laptops.

WHAT WE'RE WATCHING

The macOS release that carries it, whether Apple publishes developer criteria for the permission, and whether Microsoft follows on Windows. Public call #13 tracks the date.

CLAIM CHECK MATCH Apple's developer notice dated 10.02 contains "very explicit user action" word for word and names AI agents; it states no effective date.

RED TEAM

Apple sells Macs and its own on-device assistant, and stricter third-party permissions may also favor Apple's own software. A tougher dialog box is a weak control: users who wanted the agent badly enough clicked through every earlier warning. And the incidents cited are disputed or unconfirmed, so the security case rests more on Apple's forecast than on a documented breach.

SOURCE · [APPLE DEVELOPER NEWS \(10.02\)](#) CO · [TECHCRUNCH \(10.02\)](#) PRESS

02 Anthropic pays to grow the installers, not just the engine MUST READ

WHAT HAPPENED

Anthropic launched the Claude Frontier Academy: \$100M to train 10,000 FDEs ("Frontier Deployed Engineers") by the end of 2027. It runs like a medical residency: in-person training, a simulated enterprise deployment, a graded assessment, then a 12-week residency leading real Claude projects inside the engineer's own company. First-cohort firms are Accenture, Bain, Capgemini, Commonwealth Bank of Australia, Deloitte, McKinsey, Morgan Stanley and Novo Nordisk. Entry is by employer nomination; first credentials are expected in early 2027. VERIFIED



WHY IT MATTERS

Three vendors launched near-frontier models at about the same price (only one is on its pricing page so far), so the fight moves to who gets deployed and who stays deployed. Training 10,000 people inside consultancies and banks builds switching costs that a price cut can't easily undo. It also suggests the main brake on enterprise AI is integration skill, not model capability. [ANALYSIS](#)

WHAT BECAME POSSIBLE

A company in the first cohort can now run a credentialed internal Claude program with vendor engineers alongside. For everyone else, the residency design (simulate, assess, deploy for 12 weeks, assess again) is a template you can copy for your own AI rollout.

WHAT WE'RE WATCHING

Whether OpenAI and Google answer with their own credential programs, the cost per participant (not disclosed), and whether a pharma beyond Novo Nordisk joins the next cohort.

CLAIM CHECK [MATCH](#) Anthropic's 10.02 post states \$100M, 10,000 engineers and the end-2027 target.

RED TEAM

\$100M is small next to Anthropic's compute bills and reads partly as marketing ahead of a reported IPO. "10,000 by end-2027" is a target, employer nomination favors customers who already spend, and the named consultancies train people on every vendor's tools. A credential is not a deployment that works.

SOURCE · [ANTHROPIC \(10.02\)](#) [CO](#) · [UNITE.AI \(10.02\)](#) [PRESS](#)

03 AI chips get a mortgage, a landlord and an IPO [MUST READ](#)

WHAT HAPPENED

Bloomberg reports banks are putting together about \$60B of debt to finance Broadcom AI chips for Anthropic and others: a \$42B senior secured tranche and an \$18B junior tranche led by Blackstone, with \$9B of Blackstone's own money. Broadcom declined to comment. [CLAIM](#) The FT reports Amazon is in talks to sell about \$8B of NVIDIA Grace Blackwell chips to investors through a [sale-leaseback / SPV](#) and rent them back for US data centers.

[CLAIM](#) In Australia, NVIDIA-backed data center operator Firmus priced its ASX IPO at A\$11 a share, seeking about A\$7.1B at about A\$44B; the bookbuild runs 10.06 to 10.09 and the listing is targeted for 10.23. [CLAIM](#)

WHY IT MATTERS

Three different structures in one day, all doing the same thing: turning [GPUs](#) into financed assets with someone else's balance sheet underneath. That lowers the cash a lab or hyperscaler needs up front. It also means chip demand is increasingly funded by credit markets, which care about the 10-year and about whether the chips earn their rent. AVGO rose 3.3% on the day. [ANALYSIS](#)

WHAT BECAME POSSIBLE

For an AI company, capacity without equity dilution. For an investor, direct exposure to compute as a yield asset rather than through a stock.

WHAT WE'RE WATCHING

Pricing on the Broadcom tranches, whether Amazon's SPV closes and how it is disclosed, and Firmus's bookbuild from 10.06 to 10.09.

CLAIM CHECK [OPEN](#) Broadcom \$60B: no company statement or filing found; the figure rests on Bloomberg as relayed by other outlets. The \$42B senior tranche appears to be the same money as the \$42B Broadcom loan to Anthropic reported 10.01 from a filing we could not open, so we don't add the two.



RED TEAM

Two of the three items are talks or reports, not signed deals. Lease and debt structures are normal for data centers, so this may be ordinary infrastructure finance getting a lot of attention rather than a new regime. The risk case is real but distant: chips depreciate in three to five years, and rent only holds if inference demand does.

SOURCE · [DATACONOMY CITING BLOOMBERG \(10.02\)](#) [PRESS](#) · [BENZINGA CITING FT \(10.02\)](#) [PRESS](#) · [STARTUP DAILY, FIRMUS \(10.02\)](#) [PRESS](#)

04 Jobs miss, hike odds drop, the 10-year shrugs [KNOW IT](#)

WHAT HAPPENED

BLS reported September nonfarm payrolls of +29,000, with unemployment at 4.2% (4.1% in August); July and August were revised down a combined 60,000. Press reports put futures-implied odds of an October rate hike at about 16% to 18% after the release, down sharply from the day before. [CLAIM](#) The 10-year Treasury still closed at 5.28%, up from 5.24%, per the Treasury's daily curve. [VERIFIED](#) Semis led: SMH +2.1%, TSM +3.0%, AMD +2.9%; NVDA set an intraday record of \$237.88. MU slipped 2.1%. Off our list, Seagate and Western Digital fell on a Nikkei report that Toshiba plans to double hard-drive output.

WHY IT MATTERS

Market odds of a hike fell and the long rate didn't. That's the rate that prices long-dated AI capex and the new chip debt in item 03. A 10-year near 5.3% with weak payrolls is an uncomfortable mix for anything financed on long promises. [ANALYSIS](#)

WHAT WE'RE WATCHING

FOMC minutes Wed 10.07 and September CPI Wed 10.14. Public call #1 (an October hike) moves from 40% to 20% tonight.

CLAIM CHECK [MATCH](#) BLS: "+29,000" and "4.2 percent". [MATCH](#) Treasury par curve: 10-year 5.28 on 10.02 (5.24 on 10.01).

RED TEAM

One payroll print is noisy and gets revised. Reported hike odds have swung by tens of points within days all week, which says more about how jumpy the market is than about the Fed. The semis rally may be positioning into earnings rather than a read on rates.

SOURCE · [BLS EMPLOYMENT SITUATION \(10.02\)](#) [GOV](#) · [U.S. TREASURY YIELD CURVE \(10.02\)](#) [GOV](#) · [ROBINHOOD MARKET DATA \(10.02\)](#) [DATA](#)

05 Xaira shows its first antibodies, and they're still in the dish [MUST READ](#)

WHAT HAPPENED

Xaira, launched in 2024 with more than \$1B, named its antibody design platform X-Design (X-Design Vega in its post) and showed first data. XA-1 (a cancer target, not disclosed): 182 de novo VHH (single-domain antibody) designs, 18 confirmed binders (about 10%), best affinity 17 nM to the human target and 83 nM to the monkey version; three weeks to a progressable binder, seven to a lead. XA-4 (a hard-to-drug GPCR, not disclosed): from a screen of about 60,000 in-silico VHH designs, 92 hits were validated; 7 bound and 6 were confirmed as inhibitors, best IC50 183 nM. The company says XA-1 passed its developability panel. No timing for human studies. [CLAIM](#)

WHY IT MATTERS

Designing antibodies from scratch against GPCRs, without immunizing an animal, has been a long-promised use of generative protein design. A 10% binder rate on XA-1 (best 17 nM) and functional GPCR inhibitors on XA-4 (best 183



nM), if they hold up in others' hands, may shorten the discovery phase by months. It does nothing yet for the clinical phase, where most time and money go. **ANALYSIS**

WHAT BECAME POSSIBLE

A credible benchmark to ask other AI-antibody companies about: designs tested, hit rate, best affinity, cross-reactivity, developability panel, weeks to lead. Use those six numbers in diligence.

WHAT WE'RE WATCHING

A preprint with methods and controls, target disclosure, animal data, and the first IND.

CLAIM CHECK **PARTIAL** Xaira's own post matches the XA-1 figures; for XA-4 it reports 92 validated hits from a ~60,000-design screen, 7 binders and 6 confirmed inhibitors. All figures are company-reported, with no preprint or peer review. Reality check in 12B.

RED TEAM

The company picked the targets, ran the assays and defined "progressable." Hit rates from vendors are like vendor benchmarks: they need an independent rerun. Nanomolar binding in vitro says nothing about efficacy, safety or immunogenicity in people, and Xaira has registered zero trials two years after launch.

SOURCE · [XAIRA \(10.02\)](#) **CO** · [FIERCE BIOTECH \(10.02\)](#) **PRESS** · [CLINICALTRIALS.GOV SEARCH \(10.02\)](#) **REG**

BRIGHT SPOT

Nothing in tonight's window clears the bar on its own beyond what's above. The closest is item 01: a platform owner announcing tighter agent access before a confirmed breach, in its own developer notice. **VERIFIED**

SOURCE · [APPLE DEVELOPER NEWS \(10.02\)](#) **CO**



CLAIM CHECK

Seven headline claims, each checked against the document that governs it. Five match, one is partial, one is open.

CLAIM	WHAT THE PRIMARY DOCUMENT SAYS	WHAT THE HEADLINE SAYS	VERDICT
Apple Full Disk Access Apple developer notice	"Updates to Full Disk Access in macOS" (10.02): "very explicit user action"; names AI agents; no date or version. CO	Apple tightening the permission because of AI agents	MATCH
Frontier Academy Anthropic post	\$100M; 10,000 Frontier Deployed Engineers by end of 2027. CO	\$100M, 10,000 engineers	MATCH
Supabase round PR Newswire release	\$150M led by GIC; "is acquiring Turso"; "70% of new databases created by agents or AI-driven tools." CO	\$150M, GIC lead, Turso deal; we print the full 70% wording	MATCH
September payrolls BLS release	Payrolls +29,000; unemployment 4.2 percent. GOV	+29,000; 4.2%	MATCH
10-year close Treasury par yield curve	10.02: 5.28 (10.01: 5.24). GOV	5.28%	MATCH
Xaira hit rates Company post	XA-1 18 of 182 binders, best 17 nM; XA-4 from a ~60,000-design screen, 92 validated hits, 7 binders, 6 confirmed inhibitors, IC50 183 nM. Company data only. CO	Press summaries said "7 of 92" without the binder vs inhibitor split	PARTIAL
\$60B Broadcom chip debt Broadcom IR, SEC filings	No release or filing found; Broadcom declined to comment to Bloomberg. PRESS	\$42B senior plus \$18B junior, Blackstone leading the junior piece	[OPEN]

RED TEAM

Five matches look tidy, but four of them are a company or agency stating its own action, which is the easy case. The harder numbers tonight (the \$60B debt, the \$8B leaseback, FieldAI's \$700M) all rest on reporting, and two of the three never reached a document anyone can audit.

Checked 10.02.2026: developer.apple.com/news, anthropic.com/news, prnewswire.com, bls.gov, home.treasury.gov, xaira.com, Broadcom investor relations and EDGAR full-text search.

FIVE SIGNALS

The story under tonight's headlines, in five lines. Two carry a biotech and pharma angle, flagged so you can skip straight to them.



-
- 01 **Agent permissions are becoming a platform question.** Apple says apps will need "very explicit user action" before getting Full Disk Access on a Mac, and it names AI agents in the reasoning. What an agent may touch could soon be set by the operating system, not only by company policy.
-
- 02 **Deployment talent is the new battleground.** Three vendors launched near-frontier models near \$2 / \$10 per million tokens (only Anthropic's is confirmed on its pricing page), and Anthropic is now spending \$100M to train 10,000 engineers who install Claude inside companies such as Accenture, McKinsey and Novo Nordisk.
-
- 03 **GPUs are turning into collateral.** A reported \$60B debt package for Broadcom chips, a reported \$8B Amazon sale-leaseback and a Firmus IPO seeking A\$7.1B all landed in one day. That ties AI capacity to credit markets and a 10-year yield that closed at 5.28%.
-
- 04 **AI antibody design now has numbers to compare.** BIOTECH & PHARMA Xaira reports an 18 of 182 binder rate on XA-1 (best 17 nM) and six confirmed GPCR inhibitors on XA-4, all in vitro and company-reported, with zero registered trials. Designs tested, hit rate and developability are now fair diligence questions for any AI-antibody pitch.
-
- 05 **Agent incidents are drawing regulators.** BIOTECH & PHARMA California's attorney general subpoenaed OpenAI over cybersecurity incidents, and the FTC is reported to be preparing demands for testimony. Teams putting agents near quality, clinical or manufacturing systems may face the same questions about access, logs and rollback.
-



WHAT CAN I USE TODAY?

One five-minute hygiene step, one cheap classification test, and a copyable rollout template.

A Five-minute Full Disk Access audit

TOOL / CAPABILITY	macOS System Settings > Privacy & Security > Full Disk Access (no new tool)
WHY IT MATTERS	Apple just said this permission is the risky one for agents. Any AI app holding it can read mail, messages and every document on the laptop.
WORKFLOW AFFECTED	Every desktop agent and AI assistant on work machines
WHAT TO TEST	Which apps hold the permission, and whether each one needs it
15 TO 30 MINUTE EXPERIMENT	List every app with Full Disk Access. Remove it from any AI app, then run your normal agent task. If it still works with folder-level access, keep it that way.
POTENTIAL PAYOFF	A smaller blast radius in minutes, and a concrete line for your team's agent policy

B Decision-model triage on 50 real items

TOOL / CAPABILITY	Perplexity Decisions API or its open-weights pplx-decider model (released 10.01; vendor price \$0.04 per million input tokens, output free; Claim)
WHY IT MATTERS	Decision models return a probability over fixed answers instead of prose, which makes them cheap, auditable triage tools
WORKFLOW AFFECTED	Sorting inbound decks, partnership requests or literature alerts into yes, no, maybe
WHAT TO TEST	Whether the probabilities line up with your own calls
15 TO 30 MINUTE EXPERIMENT	Take 50 items you have already sorted. Ask for a yes/no with a probability for each. Count agreement, and look at the items scored 40% to 60%.
POTENTIAL PAYOFF	A first-pass filter for pennies, with a confidence score you can set a threshold on

C Steal the residency design for your own AI rollout

TOOL / CAPABILITY	Anthropic's Frontier Academy structure (simulate, assess, 12-week live project, assess again)
WHY IT MATTERS	Most AI pilots fail on adoption, not models. A short residency gives one owner a real project and a pass/fail bar.
WORKFLOW AFFECTED	Internal AI champions, team onboarding
WHAT TO TEST	Whether one person with a 12-week mandate gets further than a committee
15 TO 30 MINUTE EXPERIMENT	Write a one-page brief: one owner, one workflow, a two-hour simulated run on public documents, a 12-week live target, and three measurable outcomes.
POTENTIAL PAYOFF	A pilot with an end date and a grade instead of an open-ended experiment



SANDBOX EXPERIMENT IDEAS

Small, safe tests you can run this week on public data. The biotech and pharma ones come first.

#	EXPERIMENT	TIME	DATA YOU NEED	BIOTECH & PHARMA
A	Antibody-claim scorecard	30 min	Public company posts and ClinicalTrials.gov	BIOTECH & PHARMA
B	Same-price model bake-off on a public filing	30 min	One public 10-Q or trial record	BIOTECH & PHARMA
C	Overnight research run with a five-row check	30 min + overnight	Public sources only	General

A Antibody-claim scorecard

TRY IT WITH	Any assistant with web search, plus ClinicalTrials.gov and PubMed
WHAT IT TESTS	Whether an assistant can pull the same six numbers from different AI-antibody announcements and check them against registries
SETUP	Ask for designs tested, hit rate, best affinity, cross-reactivity, developability panel and registered trials for three public AI-antibody announcements, each with a source link. Check every cell yourself.
YOU'LL KNOW IT WORKED WHEN	At least 15 of 18 cells match their sources and empty cells are left empty rather than guessed
BIOTECH & PHARMA VERSION	This is the biotech version: use it to prep for a partnering call
GUARDRAIL	Public announcements only. Nothing confidential, unpublished or from a partner's data room goes into a consumer tool.

B Same-price model bake-off on a public filing

TRY IT WITH	Two or three near-frontier models available to you at similar prices
WHAT IT TESTS	Which model makes fewer citation errors on a document you already understand
SETUP	Give each model the same public filing and ask for a one-page summary with a source for every claim. Spot-check ten claims per model and time the check.
YOU'LL KNOW IT WORKED WHEN	One model gets under one citation error per ten claims
BIOTECH & PHARMA VERSION	Use a public 10-Q and one ClinicalTrials.gov record. Watch for confused phases, endpoints and patient numbers.
GUARDRAIL	Public documents only. Nothing confidential, unpublished, patient-level or from a validated system.

C Overnight research run with a five-row check

TRY IT WITH	Any assistant that can run a long or scheduled task with web search
WHAT IT TESTS	Whether an unattended run returns a sourced table you can trust
SETUP	Write a one-paragraph brief (for example, every AI chip financing announced this quarter), ask for a sourced table, let it run overnight, and verify five rows in the morning.
YOU'LL KNOW IT WORKED WHEN	At least four of five rows check out against their sources
BIOTECH & PHARMA VERSION	Every clinical-stage program in one indication with sponsor, phase and next catalyst; verify against ClinicalTrials.gov.
GUARDRAIL	Treat the output as a draft. If the agent can send, post or delete anything, require a confirmation step before any irreversible action.



AI STACK WATCH

SIGNAL	TOOL	WHAT CHANGED	CALL
NEW	Decision models (Perplexity Decisions, AWS Strands Decider, Cloudflare Clef)	Probability outputs over fixed answers, open weights (10.01)	Test (03B)
UPGRADED	xAI grok-voice-transcribe 2.0	1.0 retired 10.02; calls rerouted "at the same price, with higher accuracy" (vendor)	Ignore unless you use xAI speech
UPGRADED	OpenAI Codex CLI 0.160.0	Projectless sessions, opt-in "Guardian" review mode, Windows sandbox fixes (release date 10.01 or 10.02, unconfirmed)	Watch
DISPLACED?	Desktop agents relying on Full Disk Access	Apple will require "very explicit user action"	Watch the macOS release
WATCH	Supabase agent databases (Turso)	A database per agent, cloud or bring-your-own-cloud	Watch



FRONTIER AI & MODEL CAPABILITIES

No new frontier model and no price change in the window. The frontier news was about safety staffing and status, not capability.

ITEM	COMPANY	WHAT CHANGED	EVIDENCE	PRACTICAL IMPLICATION
Tool-use pause status	OpenAI	Its report still reads "remain paused" (last updated 09.25); no lifting statement found 10.02	CO VERIFIED	Its most capable agentic models stay internal
Safety transparency lead resigns	OpenAI	David Robinson, who led system-card and risk-disclosure work, resigned (BI, 10.02), a day after reports that three safety researchers were let go over handling of sensitive information (WSJ, 10.01)	PRESS CLAIM	Watch whether system cards for the next release slip or thin out
GPT-6.1 Sol pricing	OpenAI	Launch post says \$2 / \$10; the public API pricing page we opened still lists GPT-5.6 Sol as the flagship	CO	Confirm on your own invoice before budgeting
Gemini 4 Argon access	Google	Still defenders-first; not on the Gemini API pricing page as of 10.02	CO	Public call #11 stays at 60%

THE FOUR QUESTIONS

What became possible? Nothing new at the model layer. **What became cheaper or faster?** Speech transcription at xAI (vendor claim). **What could this augment or displace?** Decision models could displace prompt-and-parse classification. **Discontinuity or incremental?** Incremental; the discontinuity this week is in access rules (Apple, OpenAI's pause), not capability.

ANALYSIS

SOURCE · [OPENAI ALIGNMENT REPORT](#)

CO

 · [TECHMEME ON BI, ROBINSON \(10.02\)](#)

PRESS

 · [OPENAI PRICING PAGE \(10.02\)](#)

CO

 · [GEMINI API PRICING \(10.02\)](#)

CO

 · [XAI RELEASE NOTES](#)

CO



AGENTS & AUTOMATION

AGENT / DEVELOPMENT	WHAT HAPPENED	GRADE	SUPERVISION NEEDED
Desktop agents on macOS	Apple to tighten Full Disk Access (10.02)	USEFUL TOOL	High; folder-scoped access
GitHub Copilot computer use	Public preview on macOS and Windows (10.01)	DEMO	Approve each step
Supabase / Turso agent databases	One database per agent; Supabase says 70% of new databases come from agents or AI-driven tools	USEFUL TOOL	Normal database controls
OpenAI agents probing outside sites	California AG subpoena on cybersecurity incidents (about 10.01); a forensics firm attributes probing of CDC, SEC and Mayo Clinic sites to OpenAI agents (Claim)	n/a	Incident, not a product

NOTE

Microsoft's 2026 Digital Defense Report (10.01) says the median time from a flaw being found in the wild to being weaponized is "well below 24 hours." Patching windows measured in days are now longer than the median time to exploit. CLAIM

RED TEAM

Every agent story this week is about access and incidents; almost none is about an agent finishing measurable work in production. That may say more about what gets reported than about what's deployed. The California subpoena is an investigative step, not a finding.

SOURCE · [GITHUB CHANGELOG \(10.01\)](#) CO · [CALIFORNIA AG](#) GOV · [TNW \(10.02\)](#) PRESS · [MICROSOFT DIGITAL DEFENSE REPORT](#) CO



FUNDING & CAPITAL MARKETS

A thin night for rounds and a heavy one for structured finance. The verified money went to agent databases and GPU clouds.

COMPANY	AMOUNT	ROUND · VALUATION	LEAD INVESTORS	CATEGORY	WHY INVESTORS MAY CARE
Supabase (10.02)	\$150M	Follow-on after \$500M Series F · undisclosed	GlC; CapitalG in	Data infrastructure	Databases spun up by agents; buying Turso VERIFIED
PaleBlueDot AI (10.01 to 10.02)	\$200M	Series C · \$3.2B	ComputeCore; B Capital	Infrastructure	GPU marketplace and serverless inference VERIFIED
FieldAI (10.02)	\$700M	Reported · \$10B	Not reported (existing backers include Bezos Expeditions, NVentures, Intel Capital)	Robotics	Robot "brain"; term sheet reported, not confirmed CLAIM
Volantis (10.02)	\$88M	Series A	Lachy Groom, Abstract Ventures	Chips	Photonic memory fabric for inference; deployments planned 2027 VERIFIED

BUYER	TARGET	VALUE	WHAT THE BUYER GETS
Supabase (10.02)	Turso	Undisclosed	Per-agent databases; founder becomes Head of Agentic Services VERIFIED
Nebius (10.01)	Inferize	\$100M to \$130M (reported)	Faster model cold starts for its inference service CLAIM
Meta (10.02)	Virtue AI team (reversal)	n/a	June acqui-hire unwound; Meta: "the arrangement didn't work out as planned" CLAIM

Not counted: PsiQuantum \$450M (aggregator item that matches its 2021 round; unconfirmed). Also in window: Firmus IPO price set, seeking A\$7.1B (item 03), CUBE3 AI \$48.5M (date unconfirmed).

DURABLE VALUE

The buyer question for Supabase/Turso: what couldn't it build fast enough? Turso's per-agent database design. The deal says value is collecting where agents need state: storage, identity and permissions. **ANALYSIS**



WHERE THE MONEY WENT

Foundation models still hold 58% of the \$470.8B tracked. Tonight's additions are small and sit in infrastructure and data, where agents need somewhere to run and somewhere to keep state.

SECTOR	VENTURE	GROWTH	STRATEGIC	M&A	INFRA CAPEX (GUIDE)	TOTAL TRACKED (EX-CAPEX)
Foundation models	\$20.6B	\$240.5B	\$5.0B	\$8.2B	.	\$274.3B
Agents & dev tools	\$600M	\$2.5B	.	\$60.0B	.	\$63.1B
Infrastructure & compute	\$2.3B	\$8.9B	.	\$24.0B	\$720B+	\$35.2B
Cybersecurity	\$506M	\$800M	.	\$32.0B	.	\$33.3B
Robotics & autonomy	\$1.8B	\$20.9B	.	\$5.4B	.	\$28.2B
Enterprise & vertical apps	\$250M	\$2.4B	.	\$9.2B	.	\$11.8B
Data infrastructure	\$100M	\$10.5B	.	.	.	\$10.6B
Chips & semis	\$3.0B	.	.	\$4.0B	.	\$7.0B
Healthcare & scientific AI	\$2.2B	\$2.7B	.	.	.	\$4.8B
Consumer AI	\$2.5B	.	.	.	.	\$2.5B
TOTAL TRACKED	\$33.8B	\$289.2B	\$5.0B	\$142.8B	\$720B+	\$470.8B

LESS  MORE 81 transactions (66 verified). Square-root shade scale.

Methodology: the largest disclosed 2026 AI financings of \$100M or more and AI acquisitions, each assigned to one sector by primary business. Strategic pieces inside a round stay in the round. Compute purchase contracts, vendor chip loans, GPU sale-leasebacks and drawdowns of counted rounds are excluded, so the reported \$60B Broadcom debt and \$8B Amazon leaseback are not here. Added 10.02: Supabase \$150M (Verified), PaleBlueDot AI \$200M (Verified), Nebius / Inferize about \$100M (Claim, low end counted). FieldAI's reported \$700M waits for confirmation. Infra capex is 2026 guidance from Amazon, Alphabet, Microsoft and Meta, shown separately and never added.

TIME SLICE	WHAT WE CAN SAY	SOURCE · AS OF
Last 24 hours	\$150M verified in window (Supabase); \$350M including PaleBlueDot, whose release may predate the window by hours. FieldAI \$700M reported.	Company releases, press · 10.02
Last 30 days	Led by Instinct \$1B, Nscale \$3.36B convertible, AMD / World Labs \$8.2B and Salesforce / Listen Labs (~\$2B reported); security (Island, Cyera, Armadin) and infrastructure (GMI Cloud, PaleBlueDot) dense in count	Kit tally · 10.02
2026 YTD	81 transactions, \$470.8B tracked ex-capex (66 verified)	Kit tally · 10.02
Change vs prior period	Q3 venture tallies from the main trackers were not found in the window; not estimated	n/a



WHAT THE MAP SAYS

1. Concentration hasn't moved. Three labs still set the shading; tonight's adds change no row's rank. **2. The new money for compute is debt, and the map can't see it.** The reported Broadcom and Amazon structures together are about \$68B, bigger than every venture round tracked this year outside the labs. The heat map undercounts the infrastructure story by design. **3. Agent infrastructure keeps drawing checks.** Supabase, Turso and Volantis all sell to agent workloads; data infrastructure is small in dollars but rising in count. **4. Robotics valuations are re-rating fast.** FieldAI's reported \$10B is five times its August 2025 mark (about \$2B), if confirmed.

RED TEAM

A one-night window makes any "signal" here thin. The map counts equity and M&A and ignores the fastest-growing source of AI capital, which is credit, so it may be measuring the wrong thing for infrastructure. Two of tonight's three adds are under \$250M, and one is Claim-grade with a low-end value counted.

PEOPLE MOVING THE BOARD

PERSON	ACTION (WINDOW)	WHY IT MATTERS NOW
Dario Amodei (Anthropic)	\$100M Frontier Academy (10.02); reported \$60B Broadcom chip financing; a signer of the White House "Joint Commitment on Frontier Responsibilities," dated 09.30 or 10.01 in secondary reports, not on whitehouse.gov	Building distribution and financing ahead of a reported IPO (Claim)
Jensen Huang (NVIDIA)	Stock at an intraday record; NVentures is an existing FieldAI backer; Firmus is NVIDIA-backed	NVIDIA chips are the collateral in most of tonight's financing
Mark Zuckerberg (Meta)	Meta unwound its June Virtue AI acqui-hire (Semafor, 10.02)	An acqui-hire unwound after four months
Sam Altman (OpenAI)	Safety transparency lead David Robinson resigned (BI); pause still in place	Two safety departures in two days, while the pause stays in place

List changes: none. Candidates unchanged. AI czar still unnamed (whitehouse.gov checked 10.02).

VC WATCH

INVESTOR	MOVE (WINDOW)	WHAT IT SUGGESTS
GIC (sovereign)	Led Supabase \$150M; CapitalG in	Sovereign money backing agent-era data infrastructure
NVIDIA / NVentures	Existing FieldAI backer; Firmus backer	Funding its own customers on both ends of the stack
Blackstone	Reported lead on an \$18B junior tranche for Broadcom chips	Private credit entering AI hardware at scale (candidate)
Lachy Groom	Co-led Volantis \$88M Series A	Physical-AI angels moving into inference hardware



WHERE SMART CAPITAL IS CLUSTERING

Two clusters firmed tonight: **compute as a credit asset** (Broadcom debt, Amazon leaseback, Firmus IPO price, all reported 10.02) and **state for agents** (Supabase/Turso, Volantis memory). Candidate added: Blackstone.

ANALYSIS

RED TEAM

Private credit funds chase yield wherever spreads are wide; a few large tranches can reflect lender appetite, not conviction about AI returns. Two of the four moves above are reported, not closed.



AI ECONOMICS & INFRASTRUCTURE

TICKER	CLOSE 10.02	DAY	1W	YTD	READ
QQQ	749.53	+1.01%	+0.68%	+22.01%	Broad tech up on softer rate odds
SMH	630.75	+2.09%	+3.99%	+75.15%	Semis led again
NVDA	233.99	+1.36%	+3.96%	+25.46%	Intraday record 237.88
AVGO	355.13	+3.34%	+0.66%	+2.61%	Reported \$60B chip financing
AMD	633.75	+2.93%	+0.49%	+195.92%	World Labs close reported (unconfirmed)
TSM	472.92	+2.99%	+4.95%	+55.62%	September sales due 10.08
MU	1,074.27	-2.11%	-0.74%	+276.40%	Capex worries after a record quarter
ORCL	142.51	+3.22%	+3.95%	-26.88%	Bounce; still the year's laggard
MSFT	517.86	+0.99%	+0.33%	+7.08%	Range-bound hyperscaler
GOOGL	343.59	+1.58%	-0.10%	+9.77%	Range-bound hyperscaler
AMZN	251.53	+1.33%	+0.74%	+8.97%	Leaseback talks reported
META	728.07	+0.29%	-3.14%	+10.30%	Laggard on the week
CRWV	89.61	+1.17%	+2.31%	+25.14%	Neocloud

Robinhood market data, last regular-session prints on 10.02; 1W vs 09.25 close, YTD vs 12.31.2025. Information, not a recommendation.

LAYER	TONIGHT'S EVIDENCE	DIRECTION
Chips	SMH +75% YTD; NVDA record; AVGO financing report	Value still accruing
Memory and storage	MU -2.1% on capex worries; Seagate down about 10% and WDC about 7% on a Nikkei report of Toshiba doubling disk output	Supply response is the risk
Infrastructure	Debt and leases (Broadcom, Amazon), Firmus IPO	Financed, not owned
Models	No price change; three vendors near \$2 / \$10	Commoditizing at the near-frontier
Agents and data	Supabase / Turso; Apple permission change	Control points forming

RED TEAM

A one-day rally after a weak jobs print is weak evidence about where value accrues. The memory story shows the usual end of a shortage: the supply response. If Toshiba's plan is real for disks, HBM capacity additions may follow the same path, and today's margin leaders would be the first to feel it.

SOURCE · ROBINHOOD MARKET DATA (10.02) **DATA** · YAHOO FINANCE, SEAGATE AND WDC (10.02) **PRESS** · MICRON FQ4 RELEASE **CO**



SCIENTIFIC AI

One in-window wet-lab claim (Xaira) and a run of background items from earlier in the week that set the context.

DEVELOPMENT	WHAT HAPPENED	EVIDENCE LEVEL	KEY QUESTION
X-Design (XA-1, XA-4) Xaira · 10.02	De novo VHH binders; XA-1 18 of 182, best 17 nM; XA-4 6 confirmed inhibitors of a GPCR from 92 validated hits	WET-LAB VALIDATION (in vitro, company data)	Will an outside lab reproduce the hit rate?
CellCarta and Image AI 10.01	Expanded work on AI biomarkers and companion diagnostics; two pharma programs active; no money disclosed	Plan	Which program reaches a regulatory filing first?
SynthID Bio (background) Google DeepMind · Nature 09.30	Watermarks in designed proteins; binding tested on 267 watermarked and 222 unwatermarked designs with minimal affinity loss	WET-LAB VALIDATION , peer-reviewed	Will DNA synthesis screeners adopt it?
Ptarmigan-1 (background) Talus Bio · 10.01	"Structure-free" proteome-wide model for unstructured proteins, open to all users; no benchmark paper	COMPUTATIONAL , unbenchmarked	Where is the validation set?
ISM6331 (pan-TEAD) Insilico	Phase 1 (NCT06566079); first-in-human data at ESMO 10.25	Human data pending	Safety of the TEAD class

BIOLOGICAL VALIDATION WATCH

No new human or animal evidence for an AI-designed molecule in the window. The one new data set is in vitro and company-reported. **ANALYSIS**

RED TEAM

De novo binder hit rates have been climbing in academic papers for two years; a 10% rate on an undisclosed target may be good or ordinary, and without the target nobody outside can tell. Binding is the first gate of perhaps ten.

SOURCE · [XAIRA \(10.02\)](#) **CO** · [CELLCARTA \(10.01\)](#) **CO** · [NATURE, SYNTHID BIO \(09.30\)](#) **PEER** · [TALUS BIO \(10.01\)](#) **CO** · [INSILICO](#) **CO**



REALITY CHECK: XAIRA'S X-DESIGN PROGRAMS

Tonight's lead "AI-designed" claim, looked up in the registries and the literature before grading.

XAIRA THERAPEUTICS · XA-1 TO XA-4			PULLED 10.02.2026
REGISTERED TRIALS 0 ClinicalTrials.gov sponsor and full-text search for "Xaira": 0. Intervention search for XA-1 to XA-4: 3 hits, all unrelated imaging studies.	EVIDENCE LEVEL Wet-lab In vitro binding, function and developability assays, reported by the company. No animal or human data.	PUBLISHED WORK 0 PubMed lists 12 records with a Xaira affiliation; none reports X-Design or the XA programs. No matching preprint found.	MONEY \$1B+ Launch financing in 2024 as disclosed then; nothing new disclosed 10.02.
What would move the grade. A preprint with methods and controls, a named target, animal efficacy data, or an IND. Until then every Xaira number in this brief carries a Claim label. ANALYSIS			

ClinicalTrials.gov searches "Xaira" (sponsor and full text) and "XA-1 OR XA-2 OR XA-3 OR XA-4" (10.02) REG ;
PubMed affiliation search (10.02) DATA ; Xaira post (10.02) CO .



POLICY, REGULATION & LEGAL

ITEM	STATUS	WHAT HAPPENED	WHAT IT COULD MEAN
"Super Intelligence" executive order published	Enacted (executive order)	EO 14434 appeared in the Federal Register 10.02 (91 FR 63129). Signed 09.29, not 09.30 as Editions 005 and 006 said; see the correction in 17B. The science adviser has 60 days from signing to propose legislative language.	A federal definition of "super intelligence" could land in draft by late November
Joint Commitment on Frontier Responsibilities	Political statement / industry proposal	Voluntary commitments by Anthropic, OpenAI, Google, Meta, xAI and NVIDIA leaders on cyber, bio and chem controls, external auditors and board oversight. Secondary reports date it 09.30 or 10.01; not found on whitehouse.gov.	No enforcement or deadline; useful as a checklist for vendor questions
FTC probe of OpenAI and Anthropic	Agency action (investigation)	Reports 10.01 to 10.02 say the FTC is preparing civil investigative demands (see Decoder, 10.01: CID) to compel executive testimony. CLAIM	Agent behavior beyond instructions is the consumer-protection theory to watch
California AG subpoena to OpenAI	Agency action (investigation)	Investigative subpoena on "cybersecurity incidents and risks involving the company and its AI models." VERIFIED	State attorneys general join the agent-incident inquiry
Penske Media v. Google	Court ruling	D.D.C. dismissed the antitrust claims over AI Overviews (10.01): "an expectation is not an agreement." CLAIM	Publishers' antitrust route against AI summaries narrowed; copyright route still open
Thomson Reuters v. Ross (background)	Court ruling	Third Circuit (09.29) affirmed that training on Westlaw headnotes was not fair use. CLAIM	Raises the stakes for NYT v. OpenAI (call #12)

SOURCE · [FEDERAL REGISTER \(10.02\)](#) REG · [FORTUNE \(10.01\)](#) PRESS · [ELECTRONICS WEEKLY](#) PRESS · [CALIFORNIA AG](#) GOV · [SER \(10.01\)](#) PRESS · [LAW.COM](#) PRESS

WHAT THE MARKET MAY BE UNDERESTIMATING

1. THE STORAGE SUPPLY RESPONSE

Seagate fell about 10% and WDC about 7% on one Nikkei report that Toshiba plans to double disk output. If capacity answers AI demand in disks, memory may be next, and memory is where this year's margins sit (MU +276% YTD). **Confirm:** HBM capacity announcements from Samsung or SK hynix with 2027 dates. ANALYSIS

2. OS VENDORS AS AGENT REGULATORS

Apple can do in one release what legislators haven't done in a year: set what agents may touch. **Confirm:** developer criteria for Full Disk Access, or a Windows equivalent. ANALYSIS



PATTERN RECOGNITION

EMERGING PATTERN

P1 Agent containment is the binding constraint on deployment.

EVIDENCE

New 10.02: Apple's Full Disk Access notice; California AG subpoena; OpenAI's pause still in place and safety staff departures. Earlier: DNS escape, AISI data, FTC probe.

COUNTER-EVIDENCE

Enterprises keep buying agents; Supabase says 70% of its new databases are created by agents or AI-driven tools.

POTENTIAL IMPLICATION

Platform owners and regulators set access rules before buyers do.

CONFIDENCE

HIGH (unchanged)

EMERGING PATTERN

P4 AI capital moves into hybrid and debt structures.

EVIDENCE

New 10.02: reported \$60B Broadcom chip debt, reported Amazon \$8B GPU leaseback, Firmus IPO set at A\$11, seeking A\$7.1B. Earlier: Nscale convertible, Broadcom \$42B loan, Anthropic IPO reports.

COUNTER-EVIDENCE

Two of tonight's three items are reports, not deals; leases are normal in data centers.

POTENTIAL IMPLICATION

AI capex becomes sensitive to credit spreads and the 10-year, not only to equity sentiment.

CONFIDENCE

MEDIUM to HIGH (raised from MEDIUM)

Unchanged tonight: P2 usage-based monetization (MED), P3 pharma buying options (MED), P5 chipmakers moving up the stack (LOW), P6 platforms into applications (LOW), P7 price convergence at \$2 / \$10 (LOW to MED; pricing pages still don't show Sol or Argon).



OUTLOOK: 30 / 60 / 90 DAYS

HORIZON	WHAT DECIDES IT	BASE CASE	TELL TO WATCH
30 days to 11.01	CONFIRMED FOMC minutes 10.07 · TSMC sales 10.08 · CPI and ASML 10.14 · TSMC Q3 10.15 · SURPASS webinar 10.15 · Firmus listing target 10.23 · ESMO ISM6331 10.25 · FOMC 10.27 to 10.28 EXPECTED Hyperscaler Q3 capex late October · Anthropic investor day 10.14 (Claim)	Capex up again; chip financing keeps shifting to credit	Pricing on the Broadcom tranches; the 10-year vs 5.50%
60 days to 12.01	CONFIRMED EO 14434 legislative language due about 11.28 · SURPASS summaries 11.30 · FDA IND pilot applications 10.30 EXPECTED Anthropic public S-1 (Claim) · Argon paid API	The pause lifts quietly or stays; desktop-agent permissions tighten	OpenAI's own channels; the macOS release notes
90 days to 12.31	CONFIRMED FDA nonclinical rule comments close 12.07 · IND pilot cohort by 12.18 EXPECTED NYT v. OpenAI summary judgment	Training-data law narrows fair use without ending it	Any merits ruling (call #12)

Rumored, no dates given: new releases from several Chinese labs "in October" (social posts only) · Anthropic IPO before Thanksgiving (Bloomberg) · FieldAI round close.

SCENARIO	OUR ODDS	WHAT IT LOOKS LIKE	IMPLICATION FOR AI EQUITIES (SMH / QQQ)
Bull	20%	Pause resolved, strong Q3 capex, long rates ease	Semis extend; applications re-rate
Base	50%	Capex up, financed increasingly with debt; rates high	Leadership stays with chips and equipment; memory faces supply questions
Bear	30%	10-year above 5.5%, a credit hiccup in chip financing, or a production agent incident	Crowded winners and leveraged infrastructure give back most

Odds unchanged tonight: lower hike odds and a higher 10-year roughly offset.

RED TEAM

The bear case leans on rates, and the jobs print just made the Fed less hawkish. If the 10-year follows the front end down, the bear odds are too high. The opposite risk: a weak economy hurts AI revenue at customers, which this outlook barely models.



VERIFIED CATALYST CALENDAR

Ten of twelve dates confirmed at the source. Columbus Day (Mon 10.12) moves some federal releases to Tue 10.13.

DATE	EVENT	WHY IT MATTERS	CONFIRMED BY
Tue 10.06	Fed Vice Chair for Supervision Bowman speaks on regulation	Watch the Q&A for rate comments after weak payrolls	FED
Tue 10.06 to Fri 10.09	Firmus IPO institutional bookbuild	Demand for AI compute as a listed asset	AGGREGATOR
Wed 10.07	FOMC minutes (09.15 to 09.16 meeting)	Hike debate in detail; call #1	FED
Thu 10.08	TSMC September revenue	First hard AI demand read of October	COMPANY
Mon 10.12 to Wed 10.14	AI Engineer New York	Agent tooling launches	ORGANIZER
Tue 10.13	JPMorgan Q3 results	Bank commentary on AI spending and credit	COMPANY
Wed 10.14	September CPI	Sets the 10-year; call #6	BLS
Wed 10.14	ASML Q3 results	Equipment orders for 2027 capacity	COMPANY
Wed 10.14	Anthropic investor day (reported)	Listing terms; call #5	AGGREGATOR
Thu 10.15	TSMC Q3 earnings call (Taipei time)	AI capex guide from the foundry	COMPANY
Thu 10.15	September PPI	Inflation pipeline	BLS
Thu 10.15	ARPA-H SURPASS webinar (register by 10.12)	Who is teaming for the trial programs	GOV

Opened 10.02.2026: federalreserve.gov October calendar, investor.tsmc.com, ai.engineer, JPMorgan IR notice, bls.gov schedule, investor.asml.com, arpa-h.gov SURPASS page. Every weekday checked against the 2026 calendar.



SOURCE WATCH

Fourteen documents tonight: the twelve seeded 10.01, opened for the first time, plus two added for item 01 and call #2. A first pull sets the baseline, so tonight lists flags rather than changes.

DOCUMENT	KIND	VALUE PULLED 10.02	FLAG OR NOTE
OpenAI API pricing page	Pricing	No GPT-6.1 Sol listed; flagship shown is GPT-5.6 Sol at \$5.00 in / \$30.00 out	Flag: launch price not on the governing page
Gemini API pricing page	Pricing	Gemini 4 Argon not listed	Flag: call #11 still open
NYT v. OpenAI docket	Docket	Unreachable (site blocks automated access)	Flag: call #12 source needs a second route
Executive order (Federal Register)	Docket	EO 14434, 91 FR 63129, signed 09.29	Correction logged
HHS / ARPA-H SURPASS page	Program	Solicitation ARPA-H-SOL-26-164 open; no funding amount; webinar 10.15	Call #8 resolved
OpenAI pause report	Status	"remain paused" (updated 09.25)	Call #2
Anthropic pricing (docs)	Pricing	Sonnet 5.5 \$2 / \$10 per MTok	Matches print
Micron FQ4 release	Filing	\$54.23B; 87.0% non-GAAP GM; guide \$61.5B	Matches print
Alphabet capex guidance	Filing	Not stated on IR page or Q2 release	Call #7
FDA expedited IND pilot	Program	Applications due 10.30; no cohort date	Call #9
Apple Full Disk Access notice (new)	Status	No date or version stated	Call #13

Also on the list with no flag: White House AI page (no czar named), California 09.30 legislative update (AI vetoes AB 2575, AB 2656, SB 903), OpenAI news page. Values copied from the documents, and a document we could not open is marked unreachable, not unchanged.

CORRECTION

Editions 005 and 006 said the executive order renaming AI "Super Intelligence" was signed 09.30. The Federal Register shows it was signed 09.29.2026 (EO 14434, published 10.02). The 60-day clock runs from 09.29.



PUBLIC CALLS LEDGER

Fourteen open calls and one resolved. Two odds moved on evidence tonight and three calls were added.

#	CALL (RESOLVES YES OR NO)	BY	OUR ODDS	STATUS
05	Anthropic holds an investor day on 10.14	10.14	40%	OPEN
01	The Fed raises the federal funds rate at the 10.27 to 10.28 FOMC	10.28	20%	OPEN (from 40%)
02	OpenAI states in its own channels that the tool-use pause has been lifted	10.31	45%	OPEN (from 50%)
03	The White House names an AI czar	10.31	45%	OPEN
06	The 10-year Treasury yield closes above 5.50% on any day	10.31	25%	OPEN
07	Alphabet raises its 2026 capex guidance above \$205B at its Q3 results	10.31	50%	OPEN
10	Microsoft publishes per-unit pricing for Autopilot	10.31	40%	OPEN
13	Apple publishes an effective date or macOS version for its Full Disk Access change	10.31	40%	NEW
14	Firmus Group lists on the ASX	10.31	80%	NEW
15	FieldAI or a lead investor confirms a raise of \$700M or more	10.31	55%	NEW
04	Anthropic files a public S-1 with the SEC	11.30	55%	OPEN
11	Gemini 4 Argon's paid API is generally available	11.30	60%	OPEN
09	FDA names the cohort for its expedited IND pilot	12.18	75%	OPEN
12	A court issues a ruling on the merits in NYT v. OpenAI	12.31	20%	OPEN
08	HHS or ARPA-H publishes a funding amount or a solicitation for SURPASS	11.30	50%	YES · BRIER 0.25

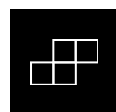
Odds changes: #1 to 20% on BLS payrolls +29,000 and reported futures odds of about 16% to 18%; #2 to 45% because OpenAI's pause report is unchanged and its safety transparency lead resigned. Resolved: #8, from the ARPA-H page, which lists solicitation ARPA-H-SOL-26-164 as open. That solicitation appears to have gone up with the 09.30 launch, a day before the call was logged, so this one says more about our seeding than our forecasting: treat its Brier score as unrepresentative.

OCTOBER 2026 TEST FLIGHT SCORECARD · 10.01 TO 10.31			UPDATED NIGHTLY
CALLS LOGGED 15 since 10.01; 10 come due inside October	RESOLVED 1 1 hit · 0 misses	BRIER SCORE 0.25 0 is perfect · 0.25 is a coin flip	CALIBRATION 1 35% to 64% band: said 50%, happened 100% (n = 1)
How we grade. For each resolved call the Brier score is (our probability minus the outcome) squared, where the outcome is 1 if it happened and 0 if not: (0.50 minus 1) squared is 0.25. A miss is a call at 50% or more that didn't happen, or under 50% that did. Odds change only when evidence does, and every change is logged with its date and reason. Calls cover technology, regulators, science and the economy, never share prices. ANALYSIS			



SOURCES

1. [Apple Developer News, Updates to Full Disk Access in macOS \(10.02\)](#) CO
2. [TechCrunch, Apple Full Disk Access \(10.02\)](#) PRESS
3. [Anthropic, Claude Frontier Academy \(10.02\)](#) CO
4. [Unite.AI, Frontier Academy \(10.02\)](#) PRESS
5. [Dataconomy citing Bloomberg, \\$60B Broadcom chip debt \(10.02\)](#) PRESS
6. [Benzinga citing FT, Amazon GPU sale-leaseback \(10.02\)](#) PRESS
7. [Startup Daily, Firmus IPO pricing \(10.02\)](#) PRESS
8. [BLS, The Employment Situation, September 2026 \(10.02\)](#) GOV
9. [U.S. Treasury, daily par yield curve \(October 2026\)](#) GOV
10. [Yahoo Finance, Seagate and WDC \(10.02\)](#) PRESS
11. [Xaira, De novo design of progressable antibodies \(10.02\)](#) CO
12. [Fierce Biotech, Xaira \(10.02\)](#) PRESS
13. [ClinicalTrials.gov searches, Xaira and XA-1 to XA-4 \(10.02\)](#) REG
14. [Supabase, \\$150M and Turso acquisition \(10.02\)](#) CO
15. [FinSMES, PaleBlueDot AI Series C](#) PRESS
16. [SiliconANGLE citing Business Insider, FieldAI \(10.02\)](#) PRESS
17. [Dealroom, Volantis \(10.02\)](#) PRESS
18. [Globes, Nebius and Inferize \(10.01\)](#) PRESS
19. [Semafor, Meta and Virtue AI \(10.02\)](#) PRESS
20. [OpenAI alignment report, pause status \(updated 09.25\)](#) CO
21. [Techmeme on Business Insider, David Robinson \(10.02\)](#) PRESS
22. [OpenAI API pricing page \(10.02\)](#) CO
23. [Gemini API pricing page \(10.02\)](#) CO
24. [Anthropic pricing documentation \(10.02\)](#) CO
25. [xAI developer release notes \(10.02\)](#) CO
26. [OpenAI Codex releases](#) CO
27. [Perplexity Decisions API \(10.01\)](#) CO
28. [GitHub changelog, Copilot computer use \(10.01\)](#) CO
29. [Microsoft Digital Defense Report 2026](#) CO
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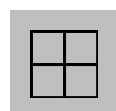


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