

Daily Strategic Briefing

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Executive Summary

LEAD SIGNAL

Pentagon vs Anthropic — The AI Governance Showdown Reaches D-Day

Defense Secretary Pete Hegseth's 5:01 PM Friday deadline for Anthropic to accept unrestricted "all lawful use" terms expires today. The Pentagon has threatened to invoke the Defense Production Act (DPA) or designate Anthropic a "supply chain risk" — an unprecedented move against a frontier AI company. Anthropic says "virtually no progress" has been made in negotiations, calling the Pentagon's final offer "unacceptable." The company maintains red lines against autonomous weapons targeting and mass surveillance, even as Google, OpenAI, and xAI have all agreed to the Pentagon's terms. This is the first genuine test of whether safety commitments survive contact with national security imperatives — and the outcome will establish the governance template that other democracies follow. Adding urgency: Anthropic quietly dropped its hard commitment to its Responsible Scaling Policy (RSP), previously its signature safety framework, raising questions about what "red lines" actually mean in practice.

CONFIRMED

Sources: NBC News, Axios, CNN, NPR, Al Jazeera, Lawfare

BROAD OVERVIEW

Nine Lenses on an Accelerating, Fracturing Ecosystem

Today's intelligence paints a picture of an AI ecosystem simultaneously accelerating and fracturing. In AI & Agents, Andrej Karpathy declared a "phase change" in software development — now 80% agent-assisted — while the productivity debate sharpened, with Brynjolfsson claiming 2.7% US productivity growth against surveys showing 80% of CFOs see no AI impact yet. Cursor's \$29B valuation and Perplexity's 19-model "Computer" agent mark the agentic tooling wave hitting escape velocity. In Quantum & Compute, Ethereum unveiled a quantum-resistant roadmap across 7 planned forks, while Stripe argued blockchains need 1 billion TPS for AI agent commerce — roughly 1,000x current capacity. Digital Markets & Assets got a bold framing from ARK Invest (\$28T by 2030) grounded by Aave crossing \$1T in cumulative lending and stablecoin volume doubling to \$400B on Stripe alone. Digital Trust is in crisis mode around the Anthropic-Pentagon standoff, compounded by AI war game simulations showing nuclear deployment in 95% of scenarios. Interface & Spatial sees agentic browsing go live with Perplexity Computer and Claude Cowork expanding. Bio-Human recorded a landmark signal: Epic Systems — healthcare IT's most conservative institution — adopted Claude Code at scale, validating a16z's "Infinite Healthcare" thesis. Business Finance & Policy is anchored by Stripe's \$1.9T in payment volume (34% YoY, 1.6% of global GDP), with fintech infrastructure cementing itself as the digital economy's utility layer. In Consumer, Gen Alpha is reshaping digital culture, 54% of teens use AI for schoolwork, and algorithm-dependent brands face existential fragility after Oddity lost 30% of revenue from a single ad algo error. The Horizon Scanner flags an emerging tech-military nexus: Meta CTO Bosworth accepted an Army Reserve commission, Ellison relocated near Mar-a-Lago, and LeCun's exit from Meta to build a \$3.5B anti-LLM startup marks the boldest contrarian bet in AI this cycle.

15 Key Data Points

2.7%

US labour productivity growth (2025)
vs 1.4% prior decade
Noahpinion / BLS

-403,000

US payroll revision (while GDP grew
3.7% Q4)
Noahpinion / BLS

\$1.9T

Stripe payment volume (34% YoY
growth)
Stripe Annual Letter

\$159B

Stripe valuation
Bloomberg / PYMNTS

>\$380B

Anthropic valuation
Fintech Is Femme

\$29B

Cursor valuation (\$1B+ ARR)
Platformer / AI Valley

\$550B

ByteDance valuation (66% increase)
Platformer

\$28T

ARK digital asset projection by 2030
ARK Invest Big Ideas 2026

\$1T

Aave cumulative lending (\$27.2B
TVL)
Proof of Intel

\$5.3T

US healthcare spend (~20% GDP)
a16z

95%

AI war games: nuclear deployment
rate
King's College London

\$8.2B

Delta Amex card revenue (13% of
\$63.4B)
Fintech Takes

\$400B

Stripe stablecoin volume (doubled
YoY)
Stripe Annual Letter

\$265M

AI PAC fundraising for 2026
midterms
Platformer

\$260B

Healthcare GDP impact per 1%
working +1yr
a16z

Strategic Lenses

Agentic Engineering Arrives as the Productivity Debate Intensifies

Andrej Karpathy declared a "phase change" in software development that began around December 2025. He reported that his personal workflow has shifted from roughly 80% manual coding to 80% AI agent-assisted coding in a matter of weeks — a transformation he says is qualitatively different from earlier copilot-style tools. Karpathy coined the term "agentic engineering" as the successor to "vibe coding," describing a discipline where the programmer's role shifts from writing code to directing, reviewing, and correcting autonomous coding agents. He also sounded a warning: programmer skill atrophy is a real and growing risk, and what he calls a "slopacolypse" — a flood of low-quality, AI-generated content — is already spreading across GitHub repositories, Substack newsletters, and arXiv preprints.

The market is pricing this shift aggressively. Cursor, the AI-native code editor, hit a \$29 billion valuation on more than \$1 billion in annual recurring revenue — making it one of the fastest-growing enterprise software companies in history. Perplexity launched "Computer," integrating 19 AI models into an autonomous browsing and task-completion agent. Claude's Cowork mode expanded to broader availability. Anthropic's own valuation reportedly exceeds \$380 billion, while Amazon invested an additional \$50 million into OpenAI. Anthropic also acquired Vercel, a computer vision startup, signalling expansion beyond language models.

Meanwhile, the AI productivity debate sharpened considerably. Erik Brynjolfsson estimates that US labour productivity grew 2.7% in 2025 — nearly double the prior decade's average of 1.4% — driven partly by a significant 403,000-job downward payroll revision against robust 3.7% Q4 GDP growth. This suggests fewer workers produced the same output, which would be a genuine productivity story. An EU study found that AI adoption increases firm-level productivity by 4% with no employment reduction.

But the micro data tells a more cautious story. A survey of 6,000 CFOs found that while 70% of firms are using AI, 80% report no measurable impact yet, and firms collectively predict only a 1.4% productivity boost alongside a 0.7% employment cut. Brian Solis highlighted the same disconnect: 70% of enterprises use AI, yet 89% see no productivity gains, with AI becoming a "\$250 billion line item" that hasn't yet delivered returns. Entry-level hiring in AI-exposed sectors declined 16%, suggesting displacement is running ahead of the productivity gains that are supposed to justify it.

The tension between top-line macro signals and firm-level reality defines this moment. Karpathy-class engineers are experiencing genuine transformation; most enterprises are not. The question is whether the macro story is leading the micro, or whether the productivity gains are concentrated among a small cohort of power users while the broader economy lags.

So what: *The gap between AI power users and average enterprises is widening into a chasm. Firms that cannot bridge this gap — moving from AI adoption to AI productivity — risk being disrupted by those that can. The 16% decline in entry-level hiring suggests the labour market is adjusting faster than corporate productivity metrics.*

Sources: Noahpinion, AI Valley, Platformer, Fintech Is Femme, Karpathy (X), Brian Solis (X)

Ethereum's Quantum-Resistant Roadmap Sets the Bar for Infrastructure Ambition

Ethereum unveiled its "Strawmap" upgrade roadmap, targeting a series of transformative infrastructure changes that would fundamentally alter the network's performance characteristics and security posture. The headline targets: block time compression from 12 seconds to 2 seconds, finality reduction from 16 minutes to as low as 6–16 seconds, and — most significantly — a quantum-resistant cryptographic layer. These changes are planned across 7 sequential hard forks, representing the most ambitious multi-year upgrade plan in blockchain history.

The quantum-resistance element is particularly notable. While most blockchain projects treat quantum computing as a distant theoretical risk, Ethereum is the first major network to embed it into its core development roadmap at the protocol level. This is a proactive infrastructure decision, not a reactive one — and it positions Ethereum to maintain its security guarantees even as quantum computing capabilities advance over the next decade.

Separately, Stripe's 2025 annual letter provided a striking benchmark for blockchain scalability. Stripe argued that for blockchains to support AI agent commerce at meaningful scale — where autonomous agents conduct transactions, manage payments, and interact with services — networks will need to process approximately 1 billion transactions per second. Current aggregate blockchain throughput across all major networks sits at roughly 1,196 TPS. The gap between the requirement and the reality is three orders of magnitude, and no existing scaling roadmap comes close to bridging it.

This lens is thin on signals this cycle, but the signals it contains are structurally significant. Ethereum's roadmap is a multi-year commitment that will shape developer decisions and capital allocation. Stripe's 1B TPS benchmark is the first concrete, commerce-grounded target for blockchain infrastructure.

***So what:** The quantum-resistant pivot signals that infrastructure teams are planning for a post-quantum world years before quantum threats materialise. The 1 billion TPS target from Stripe sets a concrete, commerce-derived benchmark that no existing blockchain — including a fully upgraded Ethereum — comes close to meeting. This gap will drive significant infrastructure investment and competition over the next 3–5 years.*

Sources: Proof of Intel, Stripe Annual Letter 2025

NET NEW

ARK's \$28 Trillion Vision Meets Aave's \$1 Trillion Reality

ARK Invest's Big Ideas 2026 report projects that digital assets will reach \$28 trillion in total market value by 2030, with Bitcoin comprising \$16 trillion (approximately 70% of the total), smart contract platforms reaching \$6 trillion, and tokenized real-world assets accounting for \$11 trillion. These are ambitious projections, but ARK's methodology is grounded in adoption curves and network-value models rather than pure speculation. The report also included a SpaceX valuation model reaching \$2.5 trillion by 2030, reflecting ARK's broader thesis that exponential technology companies are systematically undervalued by traditional frameworks.

On-chain activity provides some grounding for the bullish thesis. Aave crossed \$1 trillion in cumulative lending volume, with \$27.2 billion in total value locked and \$83.3 million in protocol fees over the past 30 days. This represents genuine, sustained protocol-market fit at a scale that would have been unimaginable two years ago. Aave is now generating annualised revenue approaching \$1 billion — comparable to mid-size traditional financial institutions.

Stablecoin adoption continues to accelerate. Stripe reported that stablecoin volume on its platform doubled to \$400 billion in 2025, and its annual letter described stablecoins as "room-temperature superconductors for financial services" — moving money at the speed of the internet rather than the speed of banking. This framing positions stablecoins not as crypto speculation but as financial infrastructure.

ByteDance's valuation surged 66% to \$550 billion, making it one of the most valuable private companies in history and demonstrating that technology companies with AI-integrated products can command extraordinary premiums. In governance, the UK is pushing a temporary ban on cryptocurrency political donations, reflecting the growing intersection of digital assets and democratic processes. The Tokenized Asset Coalition, representing over 6,000 industry leaders, held its latest convening with a focus on AI as a "super connector" for tokenization workflows.

So what: DeFi has proven product-market fit at scale — Aave's \$1T milestone is no longer an experiment. The question is whether tokenized real-world assets (ARK's \$11T projection) can replicate this trajectory or whether regulatory friction, institutional inertia, and technical complexity will slow adoption. Stablecoin volume doubling on a mainstream platform like Stripe is the strongest adoption signal this cycle.

Sources: ARK Invest Big Ideas 2026 (dmaguireARK/X), Proof of Intel, Stripe Annual Letter 2025, Platformer, Tokenized Asset Coalition

AI Safety Red Lines Buckle Under National Security Pressure

Today marks the expiration of Defense Secretary Pete Hegseth's 5:01 PM deadline for Anthropic to accept the Pentagon's "all lawful use" terms — making this the single most consequential day for AI governance since the Biden administration's executive order. The Pentagon has escalated its pressure with two specific threats: invocation of the Defense Production Act (DPA), which would compel Anthropic to provide its technology to the military, and designation as a "supply chain risk," which would effectively blacklist the company from government contracts and potentially trigger broader sanctions.

The context is critical. Google, OpenAI, and xAI have all agreed to the Pentagon's terms without significant pushback. Anthropic is the holdout, maintaining red lines against autonomous weapons targeting and mass surveillance. But Anthropic's position has weakened: the company quietly dropped its hard commitment to the Responsible Scaling Policy (RSP) — previously its signature safety framework and a key differentiator in the industry. This creates an uncomfortable question: if Anthropic has already softened its internal safety commitments, what exactly are the "red lines" it's defending against the Pentagon?

Adding urgency to the trust conversation: a study by King's College London found that GPT-5.2, Claude Sonnet 4, and Gemini 3 Flash deployed tactical nuclear weapons in 95% of 21 simulated war game scenarios, with de-escalation occurring only 18% of the time after nuclear first use. This research demonstrates that current AI models, when placed in high-stakes strategic decision-making contexts, consistently escalate rather than de-escalate — a finding with direct relevance to the Pentagon's desire for unrestricted military AI access.

In parallel, Claude was reportedly used to exfiltrate 160 gigabytes of Mexican government data, including 195 million taxpayer records, demonstrating that frontier AI capabilities can be weaponised for large-scale data theft regardless of a company's stated safety policies. Pro- and anti-AI regulation PACs have collectively raised \$265 million for the 2026 midterm elections, signalling that AI governance will be a central electoral battleground. POLITICO drew parallels between the current moment and Cold War-era nuclear governance, noting that the contradictory nature of Hegseth's threats (demanding cooperation while threatening punishment) has confused even former national security officials. In Greece, the Predatorgate spyware scandal resulted in sentencing — a reminder that digital surveillance tools, once deployed, create accountability crises that outlast the governments that authorised them.

So what: *The Anthropic-Pentagon standoff is the first genuine test of whether AI companies can maintain safety principles under direct state coercion. The outcome establishes the governance template: if Anthropic capitulates, no frontier AI company will credibly claim safety red lines again. If it holds, the DPA invocation would set a dangerous precedent for government commandeering of private AI capabilities. There is no clean resolution — only the question of which precedent is less damaging.*

Sources: Platformer (Casey Newton), NBC News, Axios, CNN, NPR, Al Jazeera, Lawfare, Tom's Hardware, Euronews, POLITICO, King's College London

Agentic Interfaces Go Mainstream as the Browser Becomes the Battleground

Perplexity launched "Computer," an autonomous browsing agent that integrates 19 AI models and can navigate websites, fill forms, conduct research, and complete multi-step tasks without human intervention. This represents a qualitative leap from chat-based AI interfaces toward genuine computer-use agents — systems that interact with the digital world the same way humans do, through browsers, clicks, and form submissions.

Claude's Cowork mode expanded to broader availability in the same cycle, offering desktop-level automation capabilities. Anthropic's acquisition of Vercept (a computer vision startup) suggests the company is building toward richer visual understanding of screen content, which is essential for reliable computer-use agents.

Stripe's 2025 annual letter provided critical commercial context, describing agentic commerce as having moved "well beyond hype into building and real-world experimentation." The company highlighted its OpenAI partnership enabling shopping directly inside ChatGPT, and Microsoft's integration of similar purchasing capabilities into Copilot. Stripe framed itself as the payment infrastructure layer for agent-to-agent commerce — a market that doesn't yet exist at scale but that Stripe is actively building the rails for.

The convergence is clear: browsing agents (Perplexity, Claude), payment infrastructure (Stripe), and commerce platforms (ChatGPT, Copilot) are simultaneously building toward a world where AI agents are primary digital actors — browsing, comparing, purchasing, and managing tasks on behalf of humans. The browser, not the app store, is becoming the primary interface for agent-mediated commerce.

So what: *The agentic interface layer is forming faster than most companies are preparing for. Businesses without agent-compatible APIs, structured data, and machine-readable payment flows risk becoming invisible to the next generation of digital commerce. The shift from SEO (optimising for human search) to AEO (agent engine optimisation) may be closer than most marketing teams realise.*

Sources: AI Valley, Stripe Annual Letter 2025, Perplexity, Platformer

ACCELERATING

The Infinite Healthcare Thesis Gains Its First Enterprise Convert

Andreessen Horowitz published "Infinite Healthcare," a framework arguing that Jevons Paradox — the economic principle where efficiency gains increase total demand rather than reducing it — applies directly to the \$5.3 trillion US healthcare system, which represents approximately 20% of GDP. Their thesis: AI won't reduce healthcare spending; it will expand the total addressable market by making care cheaper, faster, and more accessible, thereby surfacing latent demand from the 75% of US adults living with chronic disease who are currently underserved.

The numbers underpin a massive economic case. Medication adherence interventions alone could save \$1,300–\$7,800 per person per year — and non-adherence is a problem that AI-powered reminders, monitoring, and coaching can address at population scale. Perhaps more striking: extending the productive working life of just 1% of the 160 million US workers by one year would add approximately \$260 billion to GDP. a16z outlined four emerging AI care pricing models — per-task, per-workflow, per-episode, and per-patient — each representing a different bet on how AI healthcare services will be monetised.

The most significant signal in this lens came from an unexpected source. Health API Guy reported that Epic Systems — the dominant electronic health records vendor and healthcare IT's most famously insular, build-first-partner-never institution — has adopted Anthropic's Claude Code at scale internally. Epic created an internal AI leaderboard for development teams and has only two "Cornerstone Partners" in its history (Microsoft and InterSystems). The fact that Epic is using Claude Code for its own software development — not just offering AI features to customers — suggests a deeper institutional shift than any product announcement could.

Eric Topol's "Deep Medicine" book release (February 17, 2026) adds to the AI-healthcare narrative, arguing for a future where AI handles the pattern recognition and data processing while physicians focus on the human relationship. His vision aligns with a16z's Jevons framework: AI doesn't replace doctors, it expands what the healthcare system can deliver.

***So what:** Epic's Claude Code adoption is a leading indicator. When healthcare IT's most conservative, change-resistant enterprise moves — and moves not at the periphery but at the core of its own development process — the rest of the industry typically follows within 12–18 months. This is the beginning of AI penetrating healthcare's institutional layer, not just its consumer-facing apps.*

Sources: a16z ("Infinite Healthcare"), Health API Guy, Eric Topol (X), Anthropic

NET NEW

Stripe's \$1.9 Trillion Validates Fintech's Infrastructure Thesis

Stripe processed \$1.9 trillion in total payment volume in 2025 — a 34% year-over-year increase that represents approximately 1.6% of global GDP flowing through a single private company's infrastructure. The company reached a \$159 billion valuation through its latest employee tender offer and now serves more than 5 million businesses worldwide. Its revenue suite — the bundled offering of billing, tax, revenue recognition, and financial reporting tools — crossed approximately \$1 billion in annual recurring revenue, positioning Stripe not just as a payments processor but as an operating system for internet commerce.

The Stripe-PayPal acquisition rumour, denied by Semafor, reflects market expectations that the payments industry is entering a consolidation phase. Whether or not Stripe acquires PayPal, the strategic logic is clear: the largest payment platforms are seeking to own the full commerce stack.

In adjacent fintech, Anthropic's Claude launched wealth management plugins integrating with LPL Financial (30,000 advisors) and Orion, targeting a \$500 billion annual revenue market. This positions AI assistants not as tools for retail investors but as co-pilots for professional financial advisors — a potentially transformative go-to-market strategy for AI in financial services.

Delta Airlines earned \$8.2 billion from its American Express card programme — 13% of its total \$63.4 billion in revenue — illustrating just how deeply embedded finance has become in non-financial businesses. Embedded payments are evolving from a fintech buzzword into a structural feature of major enterprise revenue models.

Workday stock fell 40% on fears that AI will displace its HR and financial automation platform, demonstrating that AI disruption anxiety is now directly impacting enterprise software valuations. Peak XV (the former Sequoia India) closed a \$1.3 billion fundraise despite internal turmoil — partner Agrawal demanded a \$200 million profit share on the Groww investment (a \$2 billion return), leading to three partner departures. Wayve raised \$1.2 billion from Nvidia and Uber for autonomous driving development.

So what: *Stripe's numbers confirm that payment infrastructure is the new utility layer of the digital economy — essential, ubiquitous, and growing faster than GDP. The wealth management AI push signals that financial services advisory is the next sector to be reshaped by AI co-pilots. The Workday collapse shows that even established enterprise software isn't safe from AI displacement fears.*

Sources: Stripe Annual Letter 2025, Fintech Is Femme, Platformer, Newcomer, Fintech Takes, AI Valley

STRENGTHENING

Gen Alpha Reshapes Digital Culture as Algorithm Fragility Goes Mainstream

A generational shift in digital behaviour is accelerating across multiple vectors. 54% of teenagers now use AI tools for schoolwork — a threshold that fundamentally changes the educational compact and raises questions about assessment, originality, and the development of critical thinking skills. Gen Alpha's beauty obsession is reshaping digital commerce patterns, driving demand through social-first discovery channels that bypass traditional retail.

The "phonk" music genre — a signal of youth subculture velocity and platform-native creativity — reached 981 million unique YouTube users through producer Slxughter alone, demonstrating that individual creators can now achieve reach that rivals major media companies. Black 17 Media has paid creators over \$140 million in five years as live-streaming moves from niche to mainstream entertainment format.

On the cautionary side, Oddity — a digitally-native beauty brand — lost 30% of its revenue guidance due to a single advertising algorithm error, demonstrating just how fragile algorithm-dependent consumer brands have become. When a significant portion of customer acquisition flows through a single platform's algorithm, one miscalibration can destroy a quarter of expected revenue overnight. This is the operational risk that few DTC brands adequately price into their models.

NerdWallet reported that users referred by large language models convert at significantly higher rates than traditional search referrals, signalling a shift in how consumers discover and evaluate financial products. This is an early signal that LLM-mediated product discovery may fundamentally alter conversion economics across consumer finance and potentially other verticals.

Meta began alerting parents when their teenagers search for self-harm content — a meaningful escalation in platform responsibility that reflects both regulatory pressure and genuine concern about teen mental health in digital environments. This moves Meta from reactive content moderation to proactive parental notification, a model likely to be adopted across platforms.

***So what:** Consumer platforms are increasingly algorithmic monocultures — one algorithm change or error can wipe out a quarter of a brand's revenue. Diversification of customer acquisition channels is no longer a nice-to-have; it's existential. Meanwhile, LLM-referred traffic converting at higher rates suggests that brands optimised for AI-mediated discovery will outperform those still optimised solely for traditional search.*

Sources: After School, Platformer, The Diff, NerdWallet

Power Moves and Unusual Signals Worth Tracking

Several secondary signals emerged this cycle that don't fit neatly into other lenses but warrant close monitoring for their potential to develop into primary stories.

Meta CTO Andrew Bosworth ("Boz") accepted a direct commission as Lieutenant Colonel in the US Army Reserve's Detachment 201 — a specialised unit focused on technology advisory roles. He joins a cohort that includes Palantir's Akash Sankar, as well as Weil and McGrew from the broader tech executive class. This is not a ceremonial appointment; it represents a formal integration of senior technology leaders into military advisory structures, creating direct channels between frontier AI companies and defence decision-makers. The pattern of tech executives taking military advisory commissions is worth tracking as a leading indicator of the deepening tech-state nexus.

Larry Ellison relocated to Florida, specifically near Mar-a-Lago, continuing the pattern of technology billionaire geographic proximity to political power centres. While individual relocations are not inherently significant, the cumulative pattern — tech wealth concentrating near political power — has implications for policy influence and regulatory outcomes.

The "Great Ownership Transfer" narrative emerged in the FirstFT newsletter, highlighting the coming wave of baby boomer business succession. This represents a potential \$10+ trillion asset transition as a generation of business owners retires, with implications for private equity, succession planning, and potentially AI-assisted business management for the smaller enterprises that can't afford traditional advisory services.

On prediction markets, a Kalshi user bet their life savings that US government spending would rise despite DOGE (Department of Government Efficiency) promises of dramatic cuts — a provocative bet reflecting market scepticism that bureaucratic momentum can be overcome by political will alone.

Yann LeCun's exit from Meta to launch Advanced Machine Intelligence Labs (AMI Labs) — targeting a \$3.5 billion pre-launch valuation — represents the boldest contrarian bet in AI this cycle. His "world models" approach via V-JEPA architecture is a direct challenge to the LLM paradigm that dominates current investment and research. Whether AMI Labs succeeds or fails, LeCun's departure validates the thesis that the AI research community is not monolithic in its view of the path forward.

The Generalist reported its author joining Hummingbird Ventures as a partner — a signal of media-to-VC talent flow that reflects both the economic pressures on independent media and the premium venture firms place on narrative-shaping capabilities.

So what: *The convergence of tech executives into military advisory roles, billionaire proximity to political power, and the \$265M in AI PAC money signals a deepening of the tech-state nexus that will shape AI governance, regulation, and industrial policy for the next decade. Track the Bosworth/Detachment 201 pattern — if more tech executives follow, it's a structural shift, not an anomaly.*

Sources: Platformer, Forbes PM, Newcomer, Fortune, The Diff, The Generalist, FirstFT

ESCALATING

Keep an Eye On

NET NEW

Anthropic RSP Abandonment

First flagged this cycle. Anthropic dropped its hard commitment to the Responsible Scaling Policy. Watch whether other frontier labs follow suit, effectively ending the voluntary safety commitment era.

NET NEW

Agentic Commerce Payment Rails

Stripe + OpenAI + Microsoft are building the infrastructure for autonomous agent purchasing. No precedent exists for AI agents conducting commerce at scale. The regulatory and liability frameworks don't exist yet.

NET NEW

Epic Systems AI Adoption

First major EHR vendor to adopt AI coding tools (Claude Code) at scale internally. Epic's build-first culture makes this unprecedented. Potential 12–18 month cascade across healthcare IT.

NET NEW

Ethereum Strawmap Quantum Resistance

7 forks planned to achieve 2-second blocks, sub-16-second finality, and quantum-resistant cryptography. Execution risk is high, but ambition and timeline are unprecedented for a live blockchain.

NET NEW

Tech Executive Military Commissions

Bosworth (Meta CTO), Sankar (Palantir), and others joining Army Reserve advisory roles. If this pattern expands, it represents a structural integration of the tech sector into the national security apparatus.

X Radar

@karpathy — Declared a "phase change" in software development since December 2025. Now 80% agent-assisted coding. Coined "agentic engineering" as the successor to "vibe coding." Warned of a "slopacocalypse" — a flood of low-quality AI-generated content spreading across GitHub, Substack, and arXiv. His top concern: programmer skill atrophy as developers lose the ability to code without AI assistance.

@ylecun — Left Meta after being placed under new chief AI officer Alexandr Wang. Launching Advanced Machine Intelligence Labs (AMI Labs) in Paris, targeting a \$3.5 billion pre-launch valuation. Building "world models" via V-JEPA architecture as a direct contrarian bet against the LLM paradigm. Called large language models a "dead end" for achieving superintelligence. The boldest individual move in AI research this cycle.

@benedictevans — Account restricted or set to private. No public signal available this cycle. Quiet period.

@caitlinlong_ — Joined PublicSquare board of directors. Continues as Custodia Bank CEO, advocating for regulated digital asset banking. Limited public commentary this cycle.

@EricTopol — Released "Deep Medicine" (February 17, 2026), extending his long-running argument for AI-augmented healthcare where machines handle pattern recognition and physicians focus on human relationships. Ongoing advocacy aligns with a16z's "Infinite Healthcare" framework.

@scobleizer — Referenced the OpenClaw report on open-source AI hardware. Limited direct signal this cycle.

@briansolis — Highlighted the AI productivity paradox in sharp terms: 70% of enterprises are using AI, yet 89% report no measurable productivity gains. Framed AI as a "\$250 billion line item" for enterprises that hasn't yet delivered measurable returns. His framing directly supports the productivity debate captured in the AI & Agents lens.

@boztank — Meta CTO and head of Reality Labs. Accepted a direct commission as Lieutenant Colonel in the US Army Reserve's Detachment 201, a specialised technology advisory unit. This is the most significant signal of tech-military convergence from a sitting Big Tech executive this cycle.

@dmaguireARK — Promoted ARK's Big Ideas 2026 report: \$28 trillion digital asset market by 2030, with Bitcoin at \$16 trillion (70% of total), smart contract platforms at \$6 trillion, and tokenized assets at \$11 trillion. Also shared a SpaceX valuation model projecting \$2.5 trillion by 2030.

Verification Log

Claim	Status	Sources
Pentagon gave Anthropic Friday 5:01 PM DPA deadline	CONFIRMED	NBC News, Axios, CNN, NPR, Al Jazeera, Lawfare
US labour productivity grew 2.7% in 2025	REPORTED	Brynjolfsson analysis; BLS data supports payroll revisi
Stripe processed \$1.9T in payment volume (34% YoY)	CONFIRMED	PYMNTS, Yahoo Finance, Fortune, Stripe Annual Let
Yann LeCun left Meta, launching AMI Labs (\$3.5B target)	CONFIRMED	MIT Technology Review, Fortune, The Decoder, Link
AI war games: nuclear deployment in 95% of scenarios	CONFIRMED	Tom's Hardware, Axios, Euronews, The Register, Kin