Daily Strategic Briefing

Saturday 28 February 2026

18 sources verified | 9 influencers tracked | 5 claims confirmed

Executive Summary

LEAD SIGNAL

Anthropic Blacklisted by Pentagon as AI Governance Battle Reaches Breaking Point

Defense Secretary Hegseth's Friday 5:01 PM deadline expired without resolution. Rather than invoke the Defense Production Act, the Trump administration designated Anthropic a "Supply-Chain Risk to National Security," immediately barring all military contractors from doing business with the company and ordering all federal agencies to cease use of Anthropic technology. CEO Dario Amodei stated the company "cannot in good conscience" allow the Pentagon unlimited use for autonomous weapons targeting and mass surveillance. OpenAI immediately announced a Pentagon deal the same day to fill the void, effectively resolving the strategic competition between the two labs through government enforcement. This represents the first weaponisation of national security authority against a frontier AI company's safety commitments.

CONFIRMED

Sources: CNBC, CNN, NPR, Bloomberg, Military.com, Axios

BROAD OVERVIEW

AI Governance Crisis Coincides with Historic Capital Flows and Job Displacement

Today's landscape is defined by three converging narratives. First: the AI governance crisis. Anthropic's blacklisting demonstrates that safety commitments cannot survive contact with national security imperatives. OpenAI's immediate Pentagon deal shows market logic favors compliance over principles. Second: historic capital flows. OpenAI closed the largest private funding round in history at $110 billion (Nvidia $30B, SoftBank $30B, Amazon $50B at a $730B valuation). Stripe's $1.9 trillion in 2025 payment volume and Karpathy's declaration of "agentic engineering" mark the transition from demos to sustained AI productivity. Third: AI-driven displacement. Block's 40% workforce reduction (~4,000 jobs), explicitly blamed on AI by Jack Dorsey, sent the stock up 24% despite political backlash. The "Ghost GDP" thesis (Citrini Research) triggered a sharp SaaS selloff. Form Energy secured a $1B Google deal for 30 GWh iron-air battery, Compass Pathways achieved 3-for-3 on psilocybin Phase 3 trials, and robotics signaled acceleration with NVIDIA's EgoScale achieving 54% real-world task improvement.

15 Key Data Points

$110B OpenAI funding round, largest private raise ever Bloomberg/CNBC	**$730B** OpenAI post-money valuation Bloomberg	**40%** Block workforce reduction (~4,000 jobs) CNBC/Bloomberg
24% Block stock surge after-hours on layoff news CNBC	**30 GWh** Form Energy iron-air battery for Google TechCrunch	**$1.9T** Stripe total payment volume 2025 Stripe Annual Update
$400B Stablecoin volume doubled YoY on Stripe Stripe/Not Boring	**14-15%** Private credit default rate, AI disruption tail UBS via Net Interest	**$28T** ARK crypto market cap forecast 2030 ARK Big Ideas 2026

$15.3B Healthtech funding 2025, +26% YoY Newcomer	**100 hrs** Form Energy battery discharge duration Energy Storage News	**54%** NVIDIA EgoScale robot task improvement Robotics Herald
1,159x Zhipu AI IPO retail oversubscription State of AI	**60%** Teens believing AI cheating is widespread Pew Research	**$106B** Tariff refund liability from 900+ lawsuits FT

Strategic Lenses

AI & AGENTS

Karpathy Declares "Phase Change" as Agentic Engineering Replaces Vibe Coding

Andrej Karpathy published a detailed thread describing how coding agents crossed a qualitative threshold since December — from brittle demos to sustained, long-horizon task completion. He coined "agentic engineering" as the successor to "vibe coding," noting programmers are now 80% agent-delegating and 20% manual editing. He cautioned about skill atrophy.

Google launched Nano Banana 2 (Gemini 3.1 Flash Image), claiming #1 text-to-image at ~7 cents/image — half the cost of its predecessor. Cursor upgraded cloud agents with VMs for autonomous code building. Nous Research open-sourced Hermes Agent. Burger King deployed OAI-powered "Patty" headset. OpenAI poached Ruoming Pang from Meta after 7 months ($200M+ Apple hire). Anthropic launched financial services plugins for Claude Cowork.

> ***So what:*** *The shift from vibing to engineering signals AI coding entering its professionalization phase. Organizations that don't build systematic workflows around agents will fall behind.*

Sources: Karpathy X thread, Google Blog, The Rundown AI, Cursor Blog, The Information

ACCELERATING

QUANTUM & COMPUTE

Data Center Moratoriums Emerge as First Regulatory Constraint on AI Scaling

2026 AI capex nearly equals all net-new bank lending in 2025, ~33% larger than all US corporate income tax, ~6x any non-US G7 military budget (a16z). H100/A100 rental pricing INCREASING — Jevons Paradox: token pricing dropped from ~90 to ~50 cents/M, consumption nearly doubled (6K to 12K tokens).

New York introduced 3-year moratorium on data center permits, citing tripled electricity demand. Georgia, Vermont, Virginia, Maryland, Oklahoma introduced similar legislation. Proxima Fusion signed MoU for first commercial stellarator fusion plant in Bavaria (needs EUR 2B).

> ***So what:*** *The compute economy is becoming a macro-economic force. Data center moratoriums are the first regulatory friction that could constrain AI scaling — watch for this to become a bottleneck in 2026-27.*

Sources: a16z Charts, Not Boring, Proxima Fusion, State of AI Newsletter

ESCALATING

DIGITAL MARKETS & ASSETS

Stablecoin Explosion as Meta Plans Comeback and Exchanges Launch 24/7 Tokenized Stock Trading

Stripe confirmed $1.9T volume, stablecoin doubled to $400B, building "Tempo" blockchain with Paradigm, 5-level agentic commerce framework. Meta preparing stablecoin comeback H2 2026. Coinbase pursuing "everything exchange" with 24/7 stock trading. Kraken launched 24/7 perpetuals for tokenized US stocks.

OCC proposed stablecoin yield rulemaking. WisdomTree 24/7 tokenized MMF trading. BNP Paribas public blockchain for MMF tokenization. ARK projects $28T crypto market cap by 2030. Delaware incorporations declining ~10% (DExit). Figure debuted tokenized stock with $150M offering.

> ***So what:*** *Convergence of stablecoins, tokenized securities, and agentic commerce is creating parallel financial infrastructure at remarkable speed. Traditional finance is racing to participate.*

Sources: Stripe Annual Letter, Not Boring, TWIF, ARK Invest, a16z Charts

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DIGITAL TRUST

Anthropic Blacklisted as AI Governance Reaches Constitutional Crisis

Anthropic-Pentagon standoff climaxed: Hegseth designated Anthropic a "Supply-Chain Risk to National Security" after it refused to remove safeguards. All military contractors barred. Trump ordered federal agencies to cease use. OpenAI immediately stepped in with same-day deal. Amodei: "cannot in good conscience" allow unlimited military use.

The Diff noted Anthropic's best defense is talent can walk out — team can't be nationalized. OpenAI changed protocols after ChatGPT user allegedly committed Canadian mass shooting (8 killed). White House posted deepfake of Olympic hockey player. Email attacks evolving with AI-crafted phishing.

> ***So what:*** *The blacklisting sets a precedent reshaping how every AI lab calculates its relationship with government power. If compliance is rewarded over principles, incentives tilt toward fewer safeguards.*

Sources: CNBC, CNN, NPR, Axios, Military.com, The Diff, Cyber Safety

ESCALATING

INTERFACE & SPATIAL

Google's Nano Banana 2 Ends the Quality-Affordability Tradeoff in Image Generation

Google released Nano Banana 2 as default across Gemini. Beat NB Pro and GPT Image 1.5 for #1. 4K output, 5 characters / 14 objects consistency. ~7 cents/image, 2x cheaper at Flash speed. QuiverAI emerged from stealth, Arrow 1.0 hit #1 on Design Arena SVG leaderboard in one day.

Scoble building personalized X with AI, no coding. Karpathy returned to RSS for quality longform. Barcelona deployed dancing robots for seniors at care facilities.

> ***So what:*** *Image gen following classic curve where quality and cost decouple. Google's default integration gives billions of users SOTA image generation as commodity utility.*

Sources: Google Blog, The Rundown AI, AI Secret, Robotics Herald

STRENGTHENING

BIO-HUMAN

Psilocybin Goes 3-for-3 in Phase 3 Trials as Nutrigenomics Shows 40-Fold Lifespan Extension

Compass Pathways perfect record on Phase 3 psilocybin trials for treatment-resistant depression ($p<0.001$), FDA submission Oct-Dec 2026. Johns Hopkins post-Lyme pilot: 40% symptom reduction lasting 6 months. Arc Institute CRISPR screen: Vitamin B3 increased NAXD knockout mouse lifespan 40-fold.

Largest randomized medical AI trial (100K+ women, Sweden): AI radiology detected 29% more cancers, 44% reduced workload. Eric Topol published AI agents for healthcare in Nature BME. Healthtech funding $15.3B in 2025 (+26% YoY). Delayed adulthood: milestones at age 30 in steep decline since 1980s.

> ***So what:*** *Psilocybin FDA submission makes 2027 approval plausible — the most significant shift in psychiatric treatment in decades. B3/NAXD finding could open new therapeutic approaches.*

Sources: Not Boring, Newcomer, a16z Charts, Eric Topol/X, Nature BME

ACCELERATING

BUSINESS FINANCE & POLICY

Block's 40% AI-Driven Layoff Sends Stock Soaring 24% While "Ghost GDP" Roils Markets

Dorsey cut 40% of Block (~4,000 jobs), explicitly blaming AI. Stock surged 24%. He predicted most companies will follow within a year. Citrini "2028 Global Intelligence Crisis" introduced "Ghost GDP" — AI driving headline GDP while shrinking wage participation. Triggered SaaS selloff: Visa -4.5%, MC -6%, DASH -7%. Citadel rebutted: AI is supply-side shock, growth-enhancing.

UBS warned private credit defaults could hit 14-15% in AI disruption tail (current: 4.5%). Blue Owl strains in retail fund. Supreme Court struck down IEEPA tariff authority; 900+ companies sued for $106B refunds. Paramount Skydance $111B bid for WBD drove Netflix to walk away. JPMorgan redeploying staff for AI. Chase committed to 160 new branches.

> ***So what:*** *Block layoff is a watershed — first major company to halve workforce and credit AI. If Dorsey's prediction proves right, political response to mass displacement becomes defining policy issue.*

Sources: CNBC, Bloomberg, Fortune, FT, Citrini Research, Net Interest, TWIF

ESCALATING

CONSUME
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NY Passes First Comprehensive BNPL Regulations as "Personality Mogging" Replaces Looksmaxxing

New York first US state with comprehensive BNPL regulations: licensing, TILA-like protections, $8 late fee safe harbor. Expansive data privacy: targeted advertising, individualized pricing not "reasonably necessary." Klarna's $180M ad business (6% revenue) at risk. Block's credit score product affected.

Pew: 60% of teens believe AI cheating is widespread (75% among users). 40% of parents never discussed AI. BuzzBallz/BeatBox trending via TikTok ($5 price point). "Personality mogging" as looksmaxxing backlash, IRL dating surging. Remote workers paying more for groceries (FT).

> ***So what:*** *NY BNPL regulations set a template. Klarna, Affirm models relying on data monetization alongside lending face disruption. Teen AI cheating epidemic signals urgent educational adaptation need.*

Sources: Fintech Takes, Pew Research, After School, FT, The Rundown AI

STRENGTHENING

HORIZON SCANNER

Robot Monks, Dancing Care Bots, and the Transformation of Physical AI

Kyoto University unveiled Buddharoid robot priest on Unitree G1, ChatGPT-based, trained on Buddhist scriptures — addressing aging clergy crisis. NVIDIA EgoScale pretrained on 20,854 hours egocentric video, 54% real-world task improvement. On Running robot shoe factory: 32 robots, 1,000 LightSpray shoes/day.

German Chancellor Merz visited Unitree in Hangzhou. China testing ceiling-mounted robotic EV chargers. Uber drone delivery in Ireland with Manna. LeCun's AMI Labs raising $500M at $3.5B for world models. Bezos raising money to acquire industrial companies for AI improvement. Kalshi outperforming professional FOMC forecasters.

> ***So what:*** *Convergence of world models (AMI Labs), embodied AI (EgoScale), and physical automation points toward 2027-2028 inflection where AI moves from screens into the physical world.*

Sources: Robotics Herald, NVIDIA GEAR Lab, Not Boring, TechCrunch, AMI Labs, a16z Charts

NET NEW

Keep an Eye On

NET NEW

"Ghost GDP" narrative

Citrini's report triggered real market moves; watch SaaS credit deterioration in Q1-Q2 earnings

ESCALATING

Data center moratoriums

NY 3-year ban joined by 5 more states — could become supply-side constraint on AI scaling

STRENGTHENING

Stablecoin legislative race

OCC rulemaking + Meta comeback + FCA sandbox — regulatory frameworks solidifying rapidly

STRENGTHENING

AI talent migration

Pang's Apple to Meta to OpenAI in <2 years shows company fit matters more than compensation

NET NEW

Prediction markets vs forecasters

Kalshi perfect record on FOMC calls could shift how institutional investors source macro intelligence

NET NEW

Private credit AI exposure

UBS 14-15% default scenario + Blue Owl strains warrant monitoring as potential systemic risk

X Radar

@karpathy — Highly active. Coined "agentic engineering," declared "phase change," warned about programmer skill atrophy. Returned to RSS feeds.

@ylecun — AMI Labs in active fundraising ($500M at $3.5B). Left Meta. Building world models as contrarian bet against LLMs. Paris HQ.

@benedictevans — Account restricted/limited visibility. No significant indexed activity.

@caitlinlong_ — Quiet period. Stablecoin regulatory discussion active in her orbit.

@EricTopol — Active. Published AI agents for healthcare in Nature BME. Shared Sweden AI radiology trial results.

@scobleizer — Active. Building personalized X with AI, no coding. Highlighted Factory AI "dreaming" concept.

@briansolis — Quiet period. AI-related commentary circulating in his orbit.

@boztank — Quiet period. Previous notable: Army Reserve direct commission for AI advisory.

@dmaguireARK — ARK active with Big Ideas 2026 — $28T crypto forecast, Cathie Wood on AI capex margin pressure.

Verification Log

Claim	Status	Sources
Block laid off 40%/~4,000 staff, stock up ~24%	**CONFIRMED**	CNBC, Bloomberg, CNN
OpenAI $110B round at $730B valuation	**CONFIRMED**	Bloomberg, CNBC, TechCrunch
Anthropic blacklisted by Pentagon	**CONFIRMED**	CNBC, CNN, NPR, Military.com
"Ghost GDP" / Citrini SaaS selloff	**CONFIRMED**	Bloomberg, Fortune, Seeking Alpha
Form Energy $1B Google deal, 30 GWh	**CONFIRMED**	TechCrunch, Canary Media