

# Daily Strategic Briefing

Monday 2 March 2026

18 sources verified | 9 lenses analyzed | 5 claims confirmed

## Executive Summary

LEAD SIGNAL

### US-Israel War on Iran Triggers Strait of Hormuz Crisis

The US and Israel launched coordinated strikes on Iran, killing Supreme Leader Khamenei. Iran retaliated. Strait of Hormuz under de facto closure. Brent crude surged 13% to \$82.37/bbl. S&P; 500 futures fell 1%, gold rose 2.6%. Trump administration stated strikes will "continue until all objectives achieved." Global energy markets face immediate supply shock with 20 million barrels per day at risk through the critical Hormuz chokepoint.

CONFIRMED

Sources: FT FirstFT, Bloomberg, CNBC, Al Jazeera, Axios

## BROAD OVERVIEW

### AI Industry Fractures as Pentagon Compliance Reshapes Competition

OpenAI pivoted to classified Pentagon work while Altman called Anthropic blacklisting an "extremely scary precedent." Amodei declared Anthropic will survive on principle. OpenAI's \$110B funding round valued the company at \$840B post-money with major investments from Amazon (\$50B), NVIDIA (\$30B), and SoftBank (\$30B). Meanwhile, Blue Owl's \$1.4B fire sale rattled private credit markets. Stripe declared the internet is the domestic market with \$1.9 trillion in TPV and 34% growth. NVIDIA's GTC summit (March 16-19) promises a chip announcement to "surprise the world." Ethereum co-founder Vitalik revealed AI drafted ETH's 2030 roadmap in just 2 weeks, signaling AI's deep integration into technical governance.

## 15 Key Data Points

<b>\$82.37/bbl</b> Brent crude price (+13%) FT FirstFT	<b>-1.0%</b> S&P; 500 futures FT FirstFT	<b>+2.6%</b> Gold price movement FT FirstFT
<b>\$840B</b> OpenAI post-money valuation Bloomberg	<b>\$110B</b> OpenAI funding round TechCrunch	<b>900M</b> OpenAI monthly active users Exponential View
<b>\$159B</b> Stripe valuation Stripe Letter	<b>\$44B</b> PayPal market cap Fintech Brainfood	<b>\$1.4B</b> Blue Owl fire sale assets Bloomberg
<b>\$50B</b> Card networks market cap loss Fintech Brainfood	<b>40%</b> Block workforce reduction Fintech Brainfood	<b>10+</b> New banking charter applications FBW
<b>\$4B</b> RedotPay IPO valuation TWIF	<b>\$8B</b> Plaid tender offer price Crunchbase	<b>20M bbl/day</b> Hormuz crude flow at risk Bloomberg

# Strategic Lenses

## AI & AGENTS

### OpenAI's Pentagon Pivot Splits AI Industry as Anthropic Blacklisting Sends Shockwaves

OpenAI secured classified Pentagon deal for autonomous weapons and mass surveillance. Altman called Anthropic's blacklisting an "extremely scary precedent." Amodei responded: "patriotic Americans will recognize this as weaponization of national security authority." Pentagon called Amodei a "liar with God complex." Claude deployed for COBOL work with 43% of banking and 95% of ATM code running COBOL, \$3T+ daily. Stripe identified agentic commerce as next frontier. a16z noted agents pay like local workers. AI captured 61% of VC funding in 2025. Vitalik revealed AI drafted Ethereum 2030 roadmap in just 2 weeks.

***So what:** Government weaponization of national security against principled AI labs sets precedent. OpenAI's compliance rewarded; Anthropic's values punished. Incentives now favor fewer safeguards.*

**Sources:** TechCrunch, Bloomberg, Exponential View, a16z, Vitalik Telegram

## ESCALATING

## QUANTUM & COMPUTE

### NVIDIA Promises "Chip to Surprise the World" at GTC March 16-19

NVIDIA Graphics Technology Conference scheduled March 16-19 with surprise chip announcement. Rubin platform claimed to deliver 10x cheaper tokens. NVIDIA shares slipped post-earnings despite AI boom. Gavin Baker: frontier labs need 1,000x compute for "Citriini scenario." Compute costs remain critical bottleneck for scaling next-generation models.

***So what:** NVIDIA's compute announcement will set trajectory for 2026-2027 AI capex and model scaling roadmaps.*

**Sources:** NVIDIA Press, a16z Research, The Rundown AI

## ACCELERATING

## DIGITAL MARKETS & ASSETS

### Iran Crisis Triggers Oil Surge; Card Networks Face Historic Pressure

Brent crude spiked 13% to \$82.37/bbl on Iran strikes. Hormuz de facto closure threatens 20M bbl/day. S&P 500 futures down 1%, gold up 2.6%. Card networks lost \$50B in market cap. PayPal now valued at \$44B (formerly \$360B), making Stripe's \$159B valuation a beacon. RedotPay IPO valued at \$1B at \$4B post-money. Plaid tender increased to \$8B (+31%). Robinhood launched \$1B fund. Revolut reached \$100B valuation.

***So what:** Geopolitical shock rippling through digital finance. Card network weakness accelerates fintech capture of payments.*

Sources: FT FirstFT, Bloomberg, Fintech Brainfood, TWIF

NET NEW

## DIGITAL TRUST

### Anthropic Blacklisting Sets Huawei-Level Precedent in AI Governance

Anthropic officially designated supply-chain risk by Trump administration. First US AI company treated at Huawei level. AI war game simulations show 95% nuclear escalation rate. DOJ seized \$578M+ in crypto. Fraud scams up 1,400% YoY. Andrej Karpathy warned of "slopacolyse"—massive wave of AI-generated slop content drowning signal.

***So what:** US government using national security authority to reshape AI competition. Precedent will ripple through entire sector.*

Sources: CNBC, CNN, Axios, Karpathy X, DOJ Press

ESCALATING

## INTERFACE & SPATIAL

### Ethereum Plans Radical Execution Layer Overhaul with RISC-V Smart Accounts

Ethereum roadmap includes binary state trees and RISC-V execution architecture. Smart accounts deployment within 12 months (Hegota timeline). 80% of proving bottleneck addressed through protocol improvements. Glamsterdam testnet H1 2026, Hegota H2. Coinbase launching "Everything Exchange" for 24/7 tokenized trading.

***So what:** Ethereum's execution layer redesign could unlock order-of-magnitude efficiency gains.*

**Sources:** Ethereum Research, a16z Crypto, Coinbase Blog

## STRENGTHENING

## BIO-HUMAN

### COBOL's 64-Year-Old Workforce Meets AI; Alzheimer's Blood Test Advances

Average COBOL developer age: 64. Banking sector increasingly deploying AI agents for legacy code maintenance. Mostaque noted AI agents outperform humans on digital task completion. Stocker projected wave of Palantir-like software companies emerging. Alzheimer's blood test accuracy improved from 75% to 95% through new biomarker discovery.

***So what:** AI-driven workforce augmentation in banking meets aging legacy systems crisis.*

**Sources:** Exponential View, Not Boring, Alzheimer's Association

## ACCELERATING

## BUSINESS FINANCE & POLICY

### OpenAI's \$840B Mega-Round Reshapes AI Capital Landscape

OpenAI closed \$110B round: Amazon \$50B, NVIDIA \$30B, SoftBank \$30B at \$840B post-money. Blue Owl's \$1.4B fire sale signaled private credit stress. Stripe valued at \$159B. Block cutting staff at \$2M GP/head target. PayPal down to \$44B. 10+ new banking charter applications pending. Paradigm raised \$1.5B. AI represented 61% of VC dollars in 2025.

***So what:** OpenAI mega-round consolidates capital concentration. Blue Owl weakness hints at private credit vulnerability.*

Sources: Bloomberg, TechCrunch, Fortune, a16z Research

## ESCALATING

## CONSUMER

### Stablecoins Emerge as Settlement Infrastructure; ACH Faces Disruption

ACH processed 35.2B payments (+5% YoY). Modern Treasury launching PSP for fiat + stablecoin settlement. OCC clarified stablecoin yield regulations. Meta planning stablecoin comeback H2 2026 via Bridge. Tether deployed \$200M into Whop platform.

***So what:** Stablecoins transitioning from speculation to settlement layer in real economy.*

Sources: Modern Treasury, OCC, Meta Blog, TWIF

## STRENGTHENING

## HORIZON SCANNER

### Iran War Expands to Lebanon and Cyprus; Mt. Gox Hard Fork Imminent

IDF strikes Lebanon; 60+ villages evacuated. UK military base in Cyprus hit by Iranian missiles. Leading Iranian succession candidates also killed. UK PM Starmer granted US base access. Mt. Gox planning hard fork to distribute 80K BTC (\$5.2B). ARK projects Bitcoin to \$800K by 2030. Cathie Wood: "Reaganomics on steroids." Goldman Sachs's Blankfein warns against complacency.

***So what:** Middle East escalation expands. Mt. Gox fork removes major supply overhang from crypto markets.*

**Sources:** Bloomberg, Al Jazeera, Mt. Gox Foundation, ARK Research

NET NEW

# Verification Log

---

Claim	Status	Sources
US-Israel killed Khamenei	CONFIRMED	FT, Al Jazeera, Axios
Brent +13% to \$82.37/bbl	CONFIRMED	FT FirstFT
OpenAI \$110B at \$840B post-money	CONFIRMED	Bloomberg, TechCrunch
Hormuz de facto closure, 20M bbl/day	CONFIRMED	Bloomberg, Kpler, CNBC
Blue Owl \$1.4B fire sale	CONFIRMED	Bloomberg, CNN