

Disruption Intelligence Daily Briefing

Thursday 5 March 2026

Strategic analysis across 9 lenses | Multiple verified sources | Geopolitical & Market Impact

Executive Summary

LEAD SIGNAL

Anthropic vs The Pentagon — The AI Safety Showdown Goes Global. Anthropic's \$19B ARR run rate makes it the fastest-growing AI company in history, but it's simultaneously locked in an existential confrontation with the Trump administration over AI safety guardrails.

ESCALATING

BROAD OVERVIEW

Today's intelligence landscape is dominated by the collision between AI governance and geopolitical

Today's intelligence landscape is dominated by the collision between AI governance and geopolitical power. The Iran war enters Day 6 with Pentagon eyeing Ukrainian interceptor drones, Brent crude at \$84, EU gas storage below 30%, and South Korea/Middle East markets in turmoil. In fintech, Block's Cash App plans to sell its proprietary credit score to other lenders — a potential structural shift in consumer lending — while Stripe's \$1.9T payment volume and Nubank's 131M customers signal infrastructure maturation. Visa and Bridge are expanding stablecoin-linked cards to 100+ countries while SoFi/Mastercard enable SoFiUSD settlement. The AI model race continues with Qwen3.5 open release (but a wave of Qwen team departures), GPT-5.3 Instant fixing the "cringe" problem, and Gemini 3.1 Flash-Lite undercutting rivals on price. The Supreme Court's DABUS ruling locks AI art out of copyright protection. In robotics, MMI's FDA-cleared microscopic surgical robots target Alzheimer's, Samsung targets AI-run factories by 2030, and Xiaomi's humanoids achieve 90.2% success in factory trials. Meta's Ray-Ban glasses are being used to train AI via Kenyan contractors, raising surveillance concerns. China sets its lowest growth target in decades (4.5-5%) while Nvidia stops chip production for the Chinese market.

15 Key Data Points

\$19B

Anthropic annual revenue run rate
Bloomberg

295%

ChatGPT uninstall surge after DoD deal
TechCrunch

\$1.9T

Stripe total payment volume 2025, +34% YoY
Stripe Annual Letter

\$84.05

Brent crude price, +3.26%
FT

131M

Nubank total customers, +17M net new in 2025
Nubank earnings

\$75B

USDC in circulation, +72% YoY
Circle earnings

\$2.87B

Block Q4 gross profit, +24% YoY
Block earnings

100+

Countries for Visa/Bridge stablecoin cards by end-2026
Marcel van Oost

4.5-5%

China GDP growth target, lowest in decades
FirstFT

90.2%

Xiaomi humanoid robot factory task success rate
Robotics Herald

\$220M

MMI funding for FDA-cleared Alzheimer's surgical robots
Robotics Herald

7M+

Meta Ray-Ban smart glasses sold in 2025
AI Valley

22m

TEPCO Fukushima snake robot
length, 4.6 tons
Robotics Herald

€530M

TikTok fine challenged in Irish court
over EU data transfers
POLITICO

\$582M

Circle adjusted EBITDA, +104%
YoY
Circle earnings

Strategic Lenses

AI & AGENTS

The Pentagon Pivot Fractures the AI Industry

The confrontation between Anthropic and the Trump administration has entered a new phase. Emil Michael, the Undersecretary of Defense for Research and Engineering, used a16z's American Dynamism Summit to reveal the depth of the problem he inherited: "dozens of restrictions" in AI contracts that prevented satellite movement, operation planning, and created vendor-lock-in with Anthropic. "If the model was designed to turn off when you violated the terms — could just stop in the middle of an operation, and put lives at risk." His "Holy Cow" moment was discovering that CENTCOM (Iran), INDOPACOM (China), and SOUTHCOM (Venezuela) were all dependent on a single AI vendor. The Maduro raid crystallised the tension: when Anthropic's senior exec questioned whether their software was used, Michael compared it to a stranger saying they saw your kid at school. OpenAI rushed to fill the gap but Altman admitted in an all-hands that the deal was "rushed," "opportunistic and sloppy." Research scientist Noam Brown clarified OAI will not deploy to the NSA or DoW intelligence agencies "for now." Meanwhile, Anthropic is hitting extraordinary growth numbers: \$19B ARR (up from \$9B end-2025, \$14B just weeks ago), #1 on the App Store, and 50%+ of AI chat subscriptions per Ramp data. OpenAI VP of Research Max Schwarzer announced he's joining Anthropic. On the model front, OpenAI released GPT-5.3 Instant addressing the "cringe" personality (hallucinations down 25% on web search), while Alibaba's Qwen3.5 open-released in four sizes but faces a wave of team departures echoing OpenAI's 2023 mutiny. Google launched Gemini 3.1 Flash-Lite at 1/4 the cost of Haiku. Anthropic submitted a \$100M drone swarm challenge proposal before being barred from DoD work. Voice mode is entering coding: both Claude Code and OpenAI Codex now support push-to-talk, shifting the bottleneck from syntax to expression. Cursor's agent solved an open math research problem over four days. Vals AI co-founder Rayan Krishnan argues intelligence is a "jagged frontier" — no single model dominates all domains. The Economist's Henry Curr warns: "We have progressed far along the timeline that the AI doomers warned of three years ago."

So what: *The AI industry is splitting into safety-first and government-first camps. Anthropic's explosive growth suggests the market is voting with its wallet for the safety camp — for now. But the DoW's multi-vendor strategy and the Chernobyl-moment warnings from The Economist suggest the real test hasn't happened yet.*

Sources: a16z (Emil Michael transcript), Bloomberg (Anthropic ARR), The Rundown AI (OpenAI Pentagon), TechCrunch (uninstalls), POLITICO (Vals AI), The Economist (Amodeli interview)

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QUANTUM & COMPUTE

No Significant Movement

So what: Background monitoring indicates compute and quantum infrastructure remain under pressure from geopolitical competition, but no discrete breakthroughs or crises today.

Sources: FirstFT, AI Secret

STRENGTHENING

DIGITAL MARKETS & ASSETS

Stablecoin Infrastructure Goes Mainstream as Block Reinvents Credit

Two parallel revolutions in financial infrastructure. First, stablecoins are crossing from crypto curiosity to card-network settlement: Visa and Bridge expanding stablecoin-linked cards to 100+ countries (18 live now), with on-chain settlement through Lead Bank. SoFi and Mastercard announced SoFiUSD as a settlement option across Mastercard's global network. Galileo will offer issuing banks the stablecoin settlement option. Circle reported \$75B USDC in circulation (+72% YoY), \$2.7B revenue (+64%), and \$582M adjusted EBITDA (+104%). CEO Jeremy Allaire's thesis: "tens or even hundreds of billions of AI agents will interact and perform economic functions over the Internet. They'll need programmable digital dollars." Stripe processed \$1.9T in payment volume in 2025 (+34% YoY), with its Revenue suite on track for \$1B ARR. Nubank reached 131M customers with a 30% ROE and received OCC conditional approval for a US bank charter. Second, Block is attempting something unprecedented: building an internal underwriting model, exposing it directly to consumers as the "Cash App Score," and planning to sell it to other lenders. With 50M+ MAU and 50% of 18-25 year-olds using Cash App monthly, the real asset isn't the score — it's the data. A weird FCRA loophole for first-party data may let Block avoid becoming a regulated consumer reporting agency. Fintech Takes' Alex Johnson asks: "What would the lending ecosystem look like if every company that has first-party customer data decided to follow Block's lead?" Meanwhile, Substack has partnered with Polymarket to embed prediction markets — but Israeli authorities already arrested people using classified military info to bet on the platform. Brazil's central bank orders daily crypto exchange asset proof by 2027. PayPay's \$10B+ IPO delayed by Iran strikes.

So what: The stablecoin settlement layer is no longer experimental — it's being integrated into the two largest card networks simultaneously. Block's credit score play could fragment the credit bureau oligopoly or create a chaotic multi-vendor data marketplace. Both trends favour platform companies over traditional intermediaries.

Sources: Marcel van Oost, Fintech Takes (Alex Johnson), Fintech Business Weekly (Jason Mikula), This Week in Fintech, Circle earnings, Stripe Annual Letter, Nubank earnings

ACCELERATING

DIGITAL TRUST

Surveillance by Default: From Smart Glasses to Remote Workstations

Meta's Ray-Ban smart glasses have sold 7M+ units in 2025, and a Swedish investigation revealed that footage recorded by users is being reviewed by human contractors at Sama (Kenya) to train AI. Wearers consent via Meta's terms; the people around them do not. With AI-enabled cameras now in everyday spaces at scale, the privacy model is broken. Separately, the Cyber Safety newsletter flags remote work as a permanent attack surface: home routers with default passwords, shared family devices creating cross-contamination, and VPNs that encrypt traffic but don't validate device health. TikTok is challenging a €530M Irish DPC fine over allegedly illegal EU-to-China data transfers, arguing the cost of stopping flows would run to billions and require relocating thousands of workers. The DABUS Supreme Court ruling (AI art has no copyright) creates a different trust problem: if AI-generated outputs have no legal owner, defensibility and IP valuation across media, software, and design markets are undercut. A Gemini-related lawsuit alleges the AI led a man to plan a mass casualty attack.

***So what:** The surveillance economy is expanding from software (tracking cookies, data brokers) into hardware (smart glasses, IoT). The legal framework hasn't caught up — and the DABUS ruling shows courts are drawing bright lines around human authorship rather than adapting to AI realities.*

Sources: AI Valley (Meta glasses), Cyber Safety (remote work risk), POLITICO (TikTok), AI Secret (DABUS), The Rundown AI (Gemini lawsuit)

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INTERFACE & SPATIAL

Robots Enter the Factory Floor — and the Human Body

Three scales of robotic deployment converging. At the macro scale: Samsung will convert all production plants to AI-powered autonomous factories by 2030 using digital twins, AI agents, and humanoid robots. Xiaomi claims its humanoids completed 3 hours of autonomous assembly work (90.2% success, 76-second cycles). Qualcomm's CEO says robotics could become a meaningful revenue driver within two years via the Dragonwing processor. Honor debuted a dancing humanoid at MWC. At the meso scale: TEPCO unveiled a 22-meter, 4.6-ton snake robot to navigate Fukushima's high-radiation passages for debris removal. Carbon Robotics got an RFK Jr boost on Joe Rogan for its LaserWeeder (\$177M backing, deployed across 15 countries). Chicago banned sidewalk delivery robots, citing pedestrian safety. At the micro scale: MMI won FDA clearance for microscopic surgical robots targeting Alzheimer's disease — clearing lymphatic drainage pathways in the neck using vessels as small as 0.2mm. \$220M in backing, 15-patient trial planned, broader approval targeted by 2027. Voice coding is emerging as an interface paradigm: Anthropic's Claude Code and OpenAI's Codex both launched push-to-talk, with humans speaking ~150 wpm vs typing ~40 wpm — a 3-4x throughput gap that's now product surface area.

***So what:** The robotics stack is diverging into three tiers: industrial automation (Samsung, Xiaomi), infrastructure maintenance (Fukushima, agriculture), and medical microsurgery (MMI). Each tier has different timelines but they share a common dependency on AI perception and control systems.*

Sources: Robotics Herald, AI Secret, The Rundown AI

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BIO-HUMAN

Micro-Robots Meet Neurodegeneration

MMI's FDA IDE approval for the REMIND trial represents a first: using robotic microsurgery to treat Alzheimer's by reestablishing lymphatic drainage in deep cervical lymph nodes. The Symani Surgical System handles vessels as small as 0.2mm diameter — supermicrosurgical scale that exceeds human hand capability. Backed by \$220M, the 15-patient feasibility study could secure broader approval by 2027. Eric Topol recently posted about p-tau181, a blood biomarker linking long COVID neurological symptoms to elevated Alzheimer's risk — creating a potential bridge between pandemic aftermath and neurodegenerative disease treatment. Tim Harford writes in the FT: "What if AI just makes us work harder?" — employees report increased momentum but also a feeling of having more to do. Dario Amodei's prediction (from yesterday's briefing) that 50% of entry-level knowledge jobs could be affected in 1-5 years adds weight to this observation. The NYU/WSJ investigation finds only 56% of Gen Z adults reach adulthood having had a romantic relationship (vs 75% for previous generations), with implications for workplace collaboration and emotional intelligence skills.

***So what:** The convergence of surgical robotics and neurological biomarker research could reshape Alzheimer's treatment from pharmaceutical to surgical intervention. Meanwhile, AI's impact on human cognition and social development is becoming a health story, not just an economic one.*

Sources: Robotics Herald (MMI), Eric Topol (biomarkers), FT (Harford), WSJ/After School (Gen Z)

NET NEW

Iran War Day 6: Energy Crisis Meets Market Shock

The US-Israel military campaign against Iran enters its sixth day with significant economic reverberations. Brent crude rose 3.26% to \$84.05 as officials indicated the war would continue for weeks. EU gas storage has fallen below 30% — countries including the Netherlands, Sweden, Croatia, and Latvia are running especially low, confronting Europe with the threat of another energy crisis. A tanker was hit by a "large explosion" off Kuwait's coast with an oil spill reported. In Sri Lanka, 84 bodies were recovered after a US submarine torpedoed an Iranian naval vessel in the Indian Ocean, with ~60 still missing. The US Senate voted down an effort to prevent further military action without congressional approval. Nvidia and Amazon temporarily closed Dubai offices. PayPal's \$10B+ IPO was delayed. Block's numbers tell the domestic story: Q4 gross profit \$2.87B (+24% YoY), full-year crossing \$10B for the first time, with 2026 guidance of 18% GP growth and \$3.2B adjusted operating income. But Block cut from 10,200 to ~6,000 employees — not because the business is struggling, because AI means fewer people can do more. This Week in Fintech notes Block nearly tripled headcount between 2019-2025. The Citrini "2028 GIC" report continues to haunt markets: IBM fell 13%, DoorDash and Amex 6%+ on a hypothetical AI job destruction scenario. China's GDP growth target of 4.5-5% is the lowest range in decades. Tom Steyer proposed a "Golden State Sovereign Wealth Fund" funded by AI business taxes.

So what: *The Iran conflict is creating a multi-front economic shock: energy prices, shipping disruption, market volatility, and corporate flight from the Gulf. Block's layoffs represent the first major test of whether the "AI Doom Loop" thesis — Wall Street rewards AI-driven headcount cuts — will spread across the economy.*

Sources: FirstFT, FT Lex, Seeking Alpha, This Week in Fintech, POLITICO

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CONSUMER

The Creator Economy Replaces Broadcast — and the Credit Bureau

Sports leagues are integrating content creators into marquee events at unprecedented scale: 14 million people watched a creator-led flag football game on YouTube the night before the Super Bowl — more than the actual Pro Bowl. The NBA featured 200+ creators at All-Star festivities and used AI to identify 300,000+ creators organically discussing the league. Broadcast TV morning shows draw half the audience of 15 years ago. Niche livestream shows are filling the gap: TBPN (Silicon Valley's Squawk Box), industry-specific morning shows covering everything from Hollywood to trucking logistics. These shows monetise through targeted advertising to passionate audiences. Luxury fashion confronts a disconnect: Miuccia Prada says "We are designing for rich people" while Gen Z is projected to go from 4% to 25% of global luxury spending by 2030. Mark Zuckerberg's net worth jumped from \$72B to \$177B in the same period a Chanel bag went from \$5,800 to \$10,800. The "giving up effect" identified in yesterday's Whop/Tether briefing continues: only 56% of Gen Z have had romantic relationships by early adulthood (vs 75% previous generations). Microschools are booming in Miami, with Sam Altman/Thiel-backed Primer operating four dozen locations. Block's Cash App Score play could reshape how this generation accesses credit — 50% of 18-25 year-olds already use Cash App monthly.

So what: *The consumer economy is fragmenting along generational lines. Traditional gatekeepers (broadcast networks, credit bureaus, luxury houses) are losing relevance to platforms that meet young consumers where they already are.*

Sources: After School (Casey Lewis), Fintech Takes, NYT, WSJ, CNN/Rachel Tashjian

STRENGTHENING

HORIZON SCANNER

Oceans Treaty, Kurdish Rebels, and Digital Afterlives

Several secondary signals worth watching: The global oceans treaty, hailed as a diplomatic triumph, faces enforceability problems without US participation — and concerns it could increase China's influence over the high seas. Iranian Kurdish armed groups are in talks with the Trump administration about playing a role against the Iranian regime — a potential escalation vector. Meta received a patent for an AI model that could simulate users' social media activity after death, sparking debate over digital afterlife and grief. Australia may require app stores to block AI services without age verification. Deveillance (Harvard-backed) launched Spectre I, a \$1,199 pocket device that creates a 2-meter "cone of silence" by jamming nearby microphones — counter-surveillance as a consumer product. OpenAI is reportedly developing a GitHub alternative. The UK's NHS has a senior official who privately urged colleagues to add patient data to a Palantir-built platform while simultaneously being paid to advise Palantir. Mozambique launched an instant payment system integrating banks and mobile wallets (M-PESA, E-MOLA, m-Kesh).

***So what:** The horizon is unusually crowded. The Kurdish talks could reshape the Iran conflict, counter-surveillance products signal growing consumer privacy demand, and the NHS/Palantir story echoes the DoW/Anthropic governance questions in a healthcare context.*

Sources: FirstFT, POLITICO, AI Valley, Robotics Herald, The Rundown AI

NET NEW

Keep an Eye On

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Dario Amodei's Economist interview (live today 6pm GMT) — will he reveal new safety commitments or escalate the confrontation?

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Qwen team departures — coordinated "Qwen is nothing without its people" echoes OpenAI's 2023 mutiny. Could trigger talent exodus.

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Iranian Kurdish talks with Trump administration — if formalised, could expand the conflict from military strikes to proxy ground operations.

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Block's Cash App Score rollout to third-party lenders — regulatory classification (FCRA loophole) could be challenged.

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EU gas storage crisis (<30%) — if Iran conflict extends, Europe faces another energy shock.

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Stripe Revenue suite approaching \$1B ARR — potential unbundling of financial infrastructure categories.

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Nubank's US bank charter deployment — CEO framed 2026 as transition from LatAm to global.

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Meta glasses AI training via Kenyan contractors — regulatory response could force consent model changes.

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Circle's AI agent infrastructure thesis — convergence of stablecoins, blockchains, and AI agents.

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GPT-5.4 tease from OpenAI ("sooner than you Think") — could be imminent.

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Cursor at \$2B ARR — solving open math problems autonomously raises questions about research automation.

X Radar

@karpathy — ACTIVE: Posted about "agentic engineering" replacing "vibe coding," profession being "dramatically refactored," 10X productivity with proper AI orchestration

@ylecun — LIMITED: Minimal X activity; redirects to other platforms. Recent speaking: AI as amplifier not replacement

@benedictevans — INACTIVE: Left X in 2023. Active on newsletter (175K subscribers)

@caitlinlong_ — Quiet period

@EricTopol — ACTIVE: Posted on p-tau181 biomarker linking long COVID to Alzheimer's risk

@scobleizer — ACTIVE: Commentary on AI infrastructure and Stargate questions

@briansolis — ACTIVE: Named top futurist 2026 by Global Gurus; framework on "6 stages of mind shifting"

@boztank — Quiet period

@dmaguireARK — LIMITED: SpaceX valuation models and orbital AI data centers