

Two bets on AGI, an 80-year-old problem, and Anthropic in the black

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“Models are doing things this week that looked impossible a year ago, and they still can't reliably hold a negation across a paragraph. That gap is the whole game.”

— Lenar Kess, today's narration

Google's I/O keynote is a day behind us, and the week it kicked off turned into a referendum on two very different bets on artificial general intelligence — plus a pile of counter-programming from everyone else. Today: OpenAI cracking an 80-year-old math problem with a general-purpose model, Anthropic's first profitable quarter and what Karpathy was actually hired to do, a 70-page paper on why frontier models still can't tell a fact from a labeled lie, Midjourney's hardware regret, ads arriving inside Google's AI answers, Meta's layoffs, Cohere's open-weights comeback, and a field guide to skilling up coding agents.

- Two bets on the same finish line — Google's world-model road vs OpenAI's text-reasoning road, in the labs' own words.
- OpenAI cracks an 80-year-old problem — the planar unit distance result from a general-purpose reasoning model.
- Anthropic in the black, and Karpathy's bet — ~\$559M operating profit and a hire aimed at recursive self-improvement.
- Jagged intelligence, and the false story — the paper where models believe a story they were told a thousand times was fake.

- Midjourney's hardware regret — the tooling tax of betting on the less-supported accelerator.
- Ads come to AI Mode — the business model under the consumer bet.
- Meta's eight thousand — the cost side, on the same clock as the wins.
- Cohere comes back, Apache-licensed — Command A+, a mixture-of-experts model that fits on one or two GPUs.
- Skilling up the agent — Marc Klingens's concrete lessons on teaching a coding agent to wire up your tool.
- Who's training whom — the anxiety running underneath the week.

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