

The compute arms race goes public

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“The deal is nearly double SpaceX's 2025 revenue. Either side can walk away in 90 days.”

— Selin Oriax, today's narration

Today on Braixd: the local pass looks at the infrastructure scramble that's driving AI forward and the cracks showing up everywhere.

SpaceX's IPO filing for the Anthropic deal, Jensen Huang conceding China to Huawei, Google's two-track agent strategy, Bolt Graphics betting on high-precision GPUs, and a Google vibe-coding experiment.

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