

♦ DISPATCH 016 · 2026-05-22

Capital, Logs, and the OS Layer

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“The event log is the agent. Event-sourced reactive graphs give us auditable, forkable runtime state without fragile in-memory caches.”

— Selin Oriax, today's narration

- DeepSeek closes a roughly \$10.3 billion financing round. Founder Liang Wenfeng says the capital will fund long-horizon research, not short-term productization. Chinese AI startups raised \$16.2 billion in Q1 alone, up 185 percent year over year.
- Rest of World maps how US and Chinese AI networks remain structurally intertwined despite export controls and political friction.
- Cisco's DJ Sampath explains how Codex rewrote their AI Defense stack. Feature cycles that used to take quarters now ship in weeks.
- Yohei Nakajima publishes his first arXiv paper on event-sourced reactive graphs. BabyAGI accumulated roughly two hundred citations across implementation forks, but never had a formal academic record.
- Trail of Bits scans forty-one thousand, two hundred fifty-three real CI workflows with zizmor. They found four anchor-handling bugs and landed fifteen upstream fixes.
- Google DeepMind's Florina Muntenescu and Oli Gaymond outline Gemini Nano at the OS level. Three to four gigabyte models ship once through AI Core, shared across all apps.
- Meta completes eight thousand layoffs, roughly ten percent of its workforce. Sam Altman wins a separate court case against Elon Musk. Karpathy joins Anthropic.

- Sadiq Khan blocks a fifty million pound Palantir contract with the Met Police.
Palantir frames the rejection as a public safety risk.
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CHAPTERS

00:00:04 The Money Is Moving Underground

00:01:06 The Paper That Wasn't There

00:02:29 Quarters to Weeks, Then to Days

00:03:29 Scanning the Config Layer

00:04:33 The OS Is the New Platform

00:06:00 Ground Control
