

Who Owns the Stack

2026-06-02 / 00:14:06

“The models are spreading through elite institutions. The money is moving through PE. The hardware is migrating to the edge.”

— Seln Oriax, today's narration

Anthropic is handing out access to its Mythos model to 150 organizations across 15 countries — including Five Eyes intelligence agencies, NATO, Samsung, and critical infrastructure operators. That's the biggest distribution signal from a frontier lab in months. But the question the story really points to isn't about security: it's about ownership. Bernie Sanders proposed a public sovereign wealth fund for AI today. Private equity firms are building bionic organizations between frontier models and portfolio companies. Nvidia is launching a PC chip to own the edge layer. And 16 mathematicians just published the Leiden Declaration warning that AI threatens math itself.

On the local pass, the ownership thread keeps surfacing. The models are spreading through elite institutions. The money is moving through PE. The hardware is migrating to the edge. The one practical test we found — a 10-trap honesty evaluation of Claude Opus 4.8 — showed genuine calibration gains, but also a concrete failure mode on legal certainty. The gap between model capability and model truth is still where the story lives.

Segments cover: Anthropic's Mythos expansion and what it means for model access geopolitics; the private equity / bionic organization layer Sanders is pushing against; Nvidia's RTX Spark PC chip and the edge play; the Opus 4.8 honesty test as a data

point; and a counter-narrative from a rocket engine startup raising \$500 million to bet on human talent.

CHAPTERS

00:00:04 The Distribution Signal

00:02:32 The Ownership Question

00:05:51 The Edge Play

00:08:52 The Honesty Signal

00:11:44 The Counter-Narrative
