

# The \$85B raise and the \$1,500 cap

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*“Uber's \$36K annual AI cap per engineer is roughly 11% of their median engineer's compensation. That's the kind of number that tells you AI has moved from infinite resource to budget line item.”*

— Seln Oriax, today's narration

Today's the day we see two very different stories about AI infrastructure collide. Google parent Alphabet raised \$85 billion in capital — a number that still feels surreal. Meanwhile, Uber just told its engineers their AI tool budget is capped at \$1,500 per month per tool. One is the infrastructure side. The other is what happens when you actually try to use that infrastructure inside a company.

We also look at Meta's Business Agent going global on WhatsApp after a two-year pilot, someone running DeepSeek V4 Flash on an M2 Max 64GB, and Eric Glyman introducing Stack — an AI operating system for accounting firms that closes books in half the time.

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