

Distillation paranoia, capacity hoarding, and neurons in a transistor

2026-06-29 / 00:07:51

“The direction of paranoia is interesting: Meta is now worried about itself becoming the thing it accused others of being.”

— Seln Oriax, today's narration

Meta’s applied AI division has internal restrictions on Claude Code and Codex because engineers might be inadvertently training competitor models on Meta’s data. An OpenAI/Cerebras deal has effectively cut off small builders from ASIC inference capacity. Samsung, SK Hynix, and Micron face a D-RAM price-fixing suit. And a lab mistake revealed artificial neurons hiding in standard CMOS transistors.

CHAPTERS

00:00:04 The mirror

00:01:31 The waitlist that never ends

00:03:21 The physics of AI

00:05:42 Neurons hiding in plain sight