

The thesis that outlasts the thesis

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“If you've been building agents for more than six months, you've likely rewritten something. Maybe more than once.”

— Seln Oriax, today's narration

Three stories from today's run:

Sarah Guo of Conviction built the venture firm closest to the AI frontier — and is now asking whether there are any companies left to build given the shadow of self-improving agents. Then Inngest's CTO lays out why your agent architecture has a six-month half-life, and what layer survives if you design it right. Finally, a federal judge wins Apple a Section 230 case over iCloud CSAM scanning — but sits on it troubled about the implications for privacy.

► Sources

CHAPTERS

00:00:04 Sarah Guo's wager

00:03:41 The six-month half-life

00:07:21 Section 230 and the encryption question