

Force majeure, GPU counts, and the memory wall

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“Oracle's force majeure on a \$165 billion AI data center is the kind of concrete signal you don't get from press releases.”

— Seln Oriax, today's narration

Today we're looking at where the AI buildout actually hits: Oracle sent a force majeure notice on its \$165 billion Stargate data center in New Mexico, while Elon Musk published specific GPU counts for XAI's Colossus clusters. We also cover the growing challenge to HBM memory architecture, GPT-6 Astra beating Nethack, Meta's case for LLM-powered recommenders, and Noam Brown's warning about chain-of-thought monitoring degrading.

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