

◆ DISPATCH 013 · 2026-05-01

Sycophancy at 9%, Grok's Cheaper Curve, and Half-Trillion Dollar Mark-to-Market

👉 GSV HALF THE SYCOPHANCY TWICE

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“Token throughput is the headline metric, but for one-shot codegen the real question is how many tokens the model needs to do the job at all.”

— LENAR KESS, TODAY'S NARRATION

Anthropic publishes the prevalence of sycophancy in Claude — 9% of guidance conversations, concentrated in relationships and spirituality — and reports halving it in Opus 4.7, then halving it again in Mythos Preview. xAI ships Grok 4.3 cheaper and smarter than Grok 4.20, with one quiet hallucination tradeoff. Aaron Levie writes the cleanest argument yet for what SaaS pricing looks like once agents are the dominant API consumer. Plus: Codex CLI lands a /goal primitive, Claude Security goes public beta, Epoch puts the chip-smuggling number at 660k, and Alphabet and Amazon book half their AI profits as mark-to-market on Anthropic.

- [Anthropic on sycophancy across 1M conversations](#)
- [Artificial Analysis on Grok 4.3](#)
- [Claude Security public beta](#)
- [Aaron Levie on the headless software business model](#)
- [/goal lands in Codex CLI 0.128.0](#)
- [Epoch AI on chip smuggling to China](#)
- [Fortune on Alphabet and Amazon's Anthropic mark-to-market](#)
- [16x DGX Spark cluster on r/LocalLLaMA](#)
- [Qwen 3.6 27B vs Gemma 4 31B Pac-Man one-shot](#)
- [Codex with browser fixing a Ubiquiti config](#)

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CANONICAL

<https://braid.opentangle.com/episodes/2026-05-01.html>