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“I don't see that the department has in any way supported its determination that there is a supply chain risk with Anthropic, much less a significant supply chain risk. — Judge Karen Henderson”

— Jonas Vale, today's narration

Tuesday gave us four different markets trying to price the same thing: who has access to AI and on what terms. METR opened the kitchen of four frontier labs. A federal appeals court grilled the Pentagon over its blacklisting of Anthropic. Anduril priced at \$61B on a bet about Pentagon procurement speed, and Ukrainian drones with \$442 AI modules began hunting Russian soldiers. Former OpenAI staffers tried to write xAI's risk record into SpaceX's IPO prospectus. ICE filed for the first standardized GPU compute futures. A workshop paper showed every proposed compute threshold can be defeated for under \$100M. The US and China formally announced an AI dialogue. And Google handed AlphaFold-grade tools to a cancer researcher in Kampala. — Jonas Vale

- [METR Frontier Risk Report](#)
- [Anthropic vs. DOD oral argument](#)
- [Anduril at \\$61B](#)
- [Ukraine's AI head-hunting drones](#)
- [spacexai-risks.org](#)
- [Max Zeff reporting](#)

- [ICE x Ornn GPU compute futures](#)
 - [Robi Rahman on the memory threshold](#)
 - [Asterisk: U.S. and China want the same things](#)
 - [Gemini for Science](#)
 - [Makerere University video](#)
 - [Jeff Dean on the I/O science announcements](#)
 - [Andrew Curran on Karpathy joining Anthropic](#)
 - [Bessent on the U.S.-China AI protocol](#)
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CHAPTERS

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00:02:59 Pete Hegseth versus a 900-billion-dollar company

00:06:31 Anduril at sixty-one billion

00:10:19 Slaughterbots, but real

00:13:52 The xAI letter

00:19:44 Compute on the trading floor

00:22:38 The memory threshold

00:25:56 The dialogue, and the diffusion myth

00:30:08 Uganda, the AK2 gene, and what Gemini got pointed at

00:34:12 Five for the next ninety days
