

The Central Bank Named the Model

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“When a central bank names a specific model in a stability warning, that model has stopped being a product and started being a counterparty.”

— Jonas Vale, today's narration

A central bank did something central banks almost never do — it named a private AI model in a financial-stability warning. That, plus a research lab turning mathematical proofs into a few-hundred-dollar line item, the surveillance state pointed inward, and the physical ceiling under the whole boom.

- **The Tuesday call:** The European Central Bank summons eurozone banks to discuss Anthropic's Mythos by name, after nine top researchers tell Politico the cyber capability is real — "a SolarWinds every quarter."
- **The few-hundred-dollar proof:** Google DeepMind's agent autonomously resolves 9 of 353 open Erdős problems in Lean, and Will Depue and Nathan Lambert fight over who owns the compute that decides which sciences accelerate.
- **Pointed inward:** Palantir's \$3.9M contract to surveil federal workers at USDA, the VA, and Social Security — and the OMB director who said he wanted them "in trauma."
- **The physical wall:** Hyperscaler capex, the packaging-and-power chokepoint, and an M&A race to control energy, fiber, and compute.

- **Agents in the wild:** A billing bot leaking transaction histories, inaudible audio hijacking voice models, and a citizenship agent emailing funeral homes.
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