

The Receipt, Priced

2026-06-07 / 00:25:19

“The capability keeps arriving on schedule. The bill, the receipt, and the rulebook keep arriving late.”

— Jonas Vale, today's narration

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The capability keeps arriving on schedule. The bill, the receipt, and the rulebook keep arriving late. Today's IMPULSE follows the money and the paperwork behind the AI boom.

- **The equity stake, priced.** [Miles Brundage's math](#) on a public ownership stake — a \$40B gift would need OpenAI at a \$100T valuation just to offset one bill — plus a sharp [critique of Bernie Sanders' wealth-fund plan](#) and [DeepMind economists](#) on what stays scarce after AGI.
- **The bill nobody can read.** [KPMG finds only 26% of companies](#) have a clear view of AI costs; [Uber blew its 2026 AI budget early](#) and still can't connect the spend to customer value.
- **Good enough, or a widening gap.** [Dean Ball](#) on the US-China adoption read; Rishi Sunak and [Sebastian Mallaby](#) on "indispensability"; Paul Graham on why chokepoints are a lease, not a deed.
- **The reliable electron.** [Forbes on the AI infrastructure collision](#) — a 17% jump in data-center power demand, four-year transformer queues, and an "Eisenhower moment" for the grid.

- **Five miles away.** A Flock license-plate reader and a credulous detective put an innocent San Diego man in jail for a month.
 - **Supervised.** The viral robotaxi-vs-Waymo comparison, the caveat a Tesla booster had to add, and Jim Sciutto on the missing AI hearings in Washington.
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