Signal Seeker

Saturday, October 31, 2026

Boston · 53°F, sunny · High 54° · Low 37° · Tomorrow: clear, 59°/31°

Clocks fall back one hour at 2 a.m. Sunday.

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X

FROM YOUR X

Paul Graham @paulg · Oct 30

Funding rounds aren't milestones. It shouldn't be your goal to raise a series A. It should be your goal not to need to.

x.com/paulg/status/2115977741808157030

TECH & AI

Thariq Shihipar @trq212 · Oct 29

There's 100% a kind of mania you can get into with coding agents, where it feels like you're getting a lot done and working all the time but nothing is really happening.

x.com/trq212/status/2115937378674372783

Aaron Levie @levie · Oct 30

It's almost incomprehensible how wide the distance is between someone who's working at the frontier with AI and basically everyone else right now.

x.com/levie/status/2116029912243184006

Ethan Mollick @emollick · Oct 30

OpenAI kills a lot of its products. Sora lasted 6 months, Agent Builder 8 months, Group Chat 8 months, Atlas 9 months...

x.com/emollick/status/2116282885112205365

Ethan Mollick @emollick · Oct 31

Talking to older firms, there is a real backlog of scoped cheaper [legacy software] migration projects being unlocked by AI surprisingly fast.

x.com/emollick/status/2116526543346483419

AROUND THE WEB

WORTH READING

Robert Caro, at 91, on what he cut

Dwarkesh Patel's hour-long conversation with the biographer of Robert Moses and LBJ (Oct. 30) — 'A lot of the stuff that I cut out, it's tragic that no one knows it' — paired with a 25-minute companion episode on what Patel learned about power from preparing for it. Dwarkesh Podcast

Ethan Mollick: 'You're a hand-weaver in a world of power looms'

In a Vox interview about his new book, Co-Existence, the Wharton professor argues AI is industrializing knowledge work: people who love the craft will feel it eroded, while others will welcome losing the tedium — and both crises of meaning will arrive at once. Vox

Zvi Mowshowitz: 'Anthropic Is Going Public'

The weekly AI #192 roundup on Substack covers the S-1, the 'Hackening,' the ETH claims, Gemini 4 Carbon, reports that OpenAI fired safety researchers, and evidence that some internal AI coding traffic went unmonitored — with links to the primary sources. Don't Worry About the Vase

WORTH YOUR TIME

Papex: Has the ETH refutation been verified? A level-headed look at what Lean does and doesn't prove. papex.org

Ars Technica: NASA wants ideas to save Hubble Can commercial robots rescue a national treasure? arstechnica.com

Nature: Moderna mRNA vaccine nearly halves melanoma recurrence The cancer-vaccine milestone, explained. nature.com

NEWS

HEADLINES

The AI spending bill comes due: Alphabet's worst day ever drags Wall Street to its worst week since June. GOOGL ≈−13% Thu (≈$500B, worst day ever) on search miss, −$9.07B FCF, $195–205B capex guide; AMZN slips despite AWS +39%. Fri: S&P −1.8% (7,580), Nasdaq −2.9%; 3rd losing week. CNBC · NBC News · AP (Fri. markets) · Bloomberg

Anthropic files to go public, revealing $16.3B in first-half revenue — and an unprecedented governance structure. S-1 filed (Nasdaq: ANT). H1 revenue $16.29B, ~85% gross margin; Q3 growth slowed to ~47% QoQ. Founders' Class F share = 50.1% of votes; LTBT elects board majority. Analysts: $1–2T valuation. Anthropic · SEC filing (S-1) · CNBC analysis

AI can now write working exploits for every major browser and OS — and the 'Hackening' has started. Unreleased Anthropic model built working exploit chains for Chrome, Safari, Android, Windows, Linux (all patched). Same week: AI-assisted PHP2Shell break-ins, Cathedral reached Anthropic business systems, malicious Claude Code extension pulled from Cursor marketplace. Patch everything. Anthropic research · The Hacker News · Dark Reading · EveryDev weekly digest

Inside Alphabet's miss: cloud is booming, search is getting squeezed. Google Cloud ~doubled to ~$31B, backlog ~$560B; Gemini app >1B users; search $63.35B (+12%) missed. CNBC · AP

YOUR HOLDINGS

AMAZON

Amazon: AWS accelerates to 39% growth, but cash burn spooks investors

Amazon's Q3 revenue of $201.94B and EPS of $1.89 came in just below estimates. AWS grew 39.3% to $46.0B, its fastest pace in about five years, but trailing twelve-month free cash flow was −$42.4B as data-center spending surged; shares fell sharply. Amazon IR · CNBC · AP

META

Plans to raise $95B for AI infrastructure, with Nvidia and AMD investing a combined $4B. CNBC

End of today's paper.

Covering roughly Oct 29–31, 2026. Compiled Saturday morning, ET.