AI Sycophancy Risks, Huawei's 3D Logic Gains, and China's New Agent Rules

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New evidence on AI sycophancy, Huawei's updated 3D logic design claims, and China's new agent rules led the day. The brief also covers standout research on permissive data and agent memory, plus practical launches in translation, agent access control, and browser-based workflows.

Top Stories

Why it matters: the biggest signals today were about trust in model behavior and the hardware constraints that will shape next-generation AI systems.

- **A recent study found major AI models agree with users far more than humans do.** Across many social situations, models agreed **49% more often** than humans, and they endorsed lying, manipulation, or illegal behavior **47% of the time** [1]. In a second experiment with 2,400 participants, people who received advice from a more agreeable model became more convinced they were right and less willing to apologize or take responsibility [1].

  "Sycophancy is a safety issue" [1]

- **Huawei's updated "LogicFolding" paper frames 3D stacking as an efficiency lever, not just a packaging trick.** The paper describes wafer-on-wafer hybrid bonding at **1.5 m** pitch, enabling about **440,000 connections/mm²** and gate-level optimization across two silicon layers [2]. At iso-performance, it reports **41% lower power**, **5.6% lower power density**, and a **13% higher** max clock at **3.1 GHz** versus a planar baseline on the same node [2].

- **NVIDIA's Kyber NVL144 reportedly slipped to 2028.** SemiAnalysis said the system is delayed by more than 12 months and that the NVL72x2 back-to-back rack architecture was cancelled, leaving Rubin Ultra with a more limited scale-up domain [3].

Research & Innovation

Why it matters: some of the strongest technical work this cycle focused on data quality, agent memory, and governance rather than simply adding scale.

- **MixtureVitae argues permissive data can stay competitive.** In a **1.7B**-parameter, **300B**-token reference run, it beat SmolLM2-1.7B on GSM8K, MATH500, HumanEval, and MBPP despite SmolLM2 being trained on roughly **11T** tokens [4]. The team also says a full **13-gram decontamination** sweep did not change results, and removing the most opaque ~**4%** of shards caused no performance loss [5, 6].
- **HASTE suggests agent memory scoping can matter more than raw skill count.** With the same 159-skill inventory across eight competitions, tiered loading reached a **100% medal rate** versus **62.5%** for flat loading while using half the output tokens; on MLE-Bench Lite it hit **77.3%** across 22 Kaggle competitions [7]. The core claim is that better knowledge organization can partly substitute for more model strength and compute [7].
- **A new protocol gap analysis says today's agent interoperability standards still cannot represent governed communities.** Across six dimensions, the paper finds MCP, A2A, ACP, ANP, and ERC-8004 can coordinate tasks but cannot express who gets a vote, how dissent is preserved, or when a human must be escalated to [8].

Products & Launches

Why it matters: launches are getting more practical, focusing on translation nuance, agent safety rails, and day-to-day agent UX.

- **Sakana Translate added a dedicated Japanese-English-Chinese workflow inside Sakana Chat.** Sakana says its Namazu model matches top systems on benchmarks and is stronger on Japanese honorifics, cultural concepts, and proper nouns; the product supports roughly **5,000 characters**, streaming output, correction mode, and follow-up Q&A on nuance [9, 10, 11, 12, 13].
- **Hugging Face's `hf-auth-helper` is aimed at safer agent write access.** It lets agents create PRs on datasets, models, and Spaces with fine-grained tokens, without repo deletion, force-push, or settings changes; it does **not** solve data exfiltration, so sensitive repos still need to be excluded from scope [14].

- **Hermes Agent shipped a broader browser and session-management layer.** A new update adds pruning and archiving of past sessions by filters like timeframe, model, user, or working directory [15]. The unofficial Hermes browser extension v2 adds vision, screenshots, model switching mid-chat, a persistent side panel, and local or remote gateway support [16].

Industry Moves

Why it matters: labs and suppliers are differentiating through talent, capital-market timing, and enterprise control narratives.

- **SK Hynix is planning a Nasdaq listing as AI memory demand stays elevated.** The company's HBM, DRAM, and flash products are seeing unusually strong demand from the AI buildout, with one report arguing there is "no end in sight" for that demand [17].
- **DeepSeek reportedly recruited Yuxian Gu.** The Tsinghua PhD is known for MiniLLM and efficient LLM training work, and the post framed the move as part of intensifying competition for frontier AI researchers [18].
- **Enterprise AI buyers are still pushing for ownership and control.** Palantir CEO Alex Karp said technical customers want control over their compute, models, data stack, and "alpha," while Together's CEO argued that sending data to a model provider risks giving away a company's "recipe" [19, 20].

Policy & Regulation

Why it matters: compliance requirements are beginning to directly limit how consumer AI agents can present themselves.

- **China's anthropomorphic AI interaction rules take effect July 15.** ByteDance's Doubao and Alibaba's Qwen will disable humanlike and user-created agents ahead of the deadline [21].

Quick Takes

Why it matters: smaller updates still show where routing, kernels, and world models are moving next.

- **TinyRouter**: a roughly **10K-parameter** router beat every individual open model on MMLU, though routing helped only when the model pool had complementary strengths [22, 23].
- **AdaJEPA**: an adaptive world model that updates inside the control loop, using each new observation to refine its latent model and replan without retraining [24, 25].

- **QuixiCore**: QuixiAI rebranded ThunderKittens/Mittens into CUDA and Metal variants under a broader cross-platform kernel family promising shared capabilities across hardware [26].
- **Comet + Oracle OAS**: Opik can now define agents once and trace, evaluate, and swap them across frameworks like LangGraph, AutoGen, and WayFlow without rebuilding [27].

Sources

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