

Belsky backs a "speed is the new moat" case for Cerebras; Khosla points to Claude's formal-verification work

Recommended Reading from Tech Founders

2026-10-24

Belsky backs a "speed is the new moat" case for Cerebras; Khosla points to Claude's formal-verification work

By Recommended Reading from Tech Founders • October 24, 2026

This period's picks: Scott Belsky on fast inference, Vinod Khosla on Anthropic and Theorem Labs' formal verification, Fred Wilson's two listens on agency in the AI era, Tobi Lütke's code-mode environment, and shorter mentions from Fadell, Hoover, Sweeney, Gerstner, Armstrong and Puri.

Scott Belsky: "Nobody Wants Dial-Up AI," by Artur Meyster

Belsky shared Meyster's X article on Cerebras (\$CBRS) under the line "speed is the new moat." His takeaway: we won't want to wait for agents to finish very complex tasks "if there's a faster way to get it done." [1]

Meyster's main evidence is a test Cerebras ran last month: booking a dinner reservation through an AI assistant. Grokbot took 7m40s, Claude Cowork 6m25s, Meta's Muse 4m36s, and an assistant running on Cerebras 22 seconds. [2] He argues that now that every assistant is smart, the question is "how fast does it get things done?" He compares this to dial-up giving way to broadband. [2] Keep in mind that the author has held Cerebras since 2024 and bought more after the stock fell about 40% below its IPO price. [2]

Vinod Khosla: Anthropic and Theorem Labs on formal verification

Khosla said he is “a total fan” of Theorem Labs’ work adding formal verification to probabilistic LLMs, calling it an “Important concept broadly.” [3] He shared Anthropic’s Frontier Red Team post on the work. Anthropic says formal verification used to be practical only for small codebases or took a lot of expert time. With Theorem Labs, it used Claude to prove security properties in more than 100 real-world open-source libraries over a few weeks. (Full research) [4]

Fred Wilson: two listens on autonomy and agency

Wilson recommended two videos for people with a lot of commuting, driving or working out ahead, saying both “speak to autonomy and agency in the AI era.” [5]

- A conversation between the founders of Cloudflare and Nous/Hermes about the emerging open agentic stack and why it matters. [6]
- A video on how a teenage spent deep in the Napster/BitTorrent era led to founding startups and investment firms focused on autonomy and agency. [7]

Tobi Lütke: dquickts

Tobi called stencil-hq/dquickts an “Excellent code mode env.” [8] He shared it by quoting an earlier post of his. There he argued that the MCP-vs-CLI debate is at the wrong layer: both work well when LLMs run inside a REPL-like environment that keeps state, and code-mode REPLs (usually QuickJS) are among the best options. [9]

Shorter mentions

- **Tony Fadell** marked the iPod’s 25th anniversary by sharing Steven Levy’s WIRED piece, “I’m Still Convinced the iPod Was the Perfect Gadget”. He noted that Levy “was there from the start.” [10]
- **Ryan Hoover** told founders to “embrace the cringe,” linking Sandy B. Kwon’s essay “Is It Cringe or Am I Just Uncomfortable?”. [11]
- **Tim Sweeney** said a post by @JNavok is “exactly what’s happening.” [12] The post argues that Valve’s labels on AI-assisted games draw hostile attention that hurts indie developers’ finances. [13]
- **Brad Gerstner** called a John Mackey clip shared by David Senra “Beautiful & true.” [14] In the clip, Mackey argues that capitalism creates “win win win” outcomes and that all philanthropy and taxes ultimately come from business. [15]
- **Brian Armstrong** linked Coinbase’s new research with The Block on the “always-on economy.” [16] He shared it alongside his argument that

stablecoins suit agent payments because agents need instant, global settlement, including for small amounts. [17] Coinbase produced the research, so this is a self-promotion.

- **Shaan Puri** called *Nathan For You* season 1, episode 4 “a work of art.” He found it after the Elizabeth Holmes movie sent him down a Nathan Fielder rabbit hole. [18]

Sources

1. X post by @scottbelsky
2. X article by @ArturMeyster
3. X post by @vkhosla
4. X post by @AnthropicAI
5. X post by @fredwilson
6. X post by @fredwilson
7. X post by @fredwilson
8. X post by @tobi
9. X post by @tobi
10. X post by @tfadell
11. X post by @rrhoover
12. X post by @TimSweeneyEpic
13. X post by @JNavok
14. X post by @altcap
15. X post by @davidsenra
16. X post by @brian_armstrong
17. X post by @brian_armstrong
18. X post by @ShaanVP