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Investor picks around Anthropic's IPO, AI-era company turnarounds and AI-driven science, plus Patrick Collison's magazine pitch and Brian Armstrong's Civilization tech tree.

Ahead of the Anthropic IPO: Social Capital's deep dive

Chamath Palihapitiya said of Social Capital's Anthropic deep dive: "This one was really good." [1] The firm says it spent three months on the report ahead of the IPO. It sets out to answer three questions: who controls Anthropic after it lists, how the company plans to outgrow its $900 billion computing bill, and why people who thought AI could end in catastrophe built one of the fastest-growing companies ever [2].

Casado: Netlify as the turnaround case study

Martin Casado endorsed Alex Konrad's interview with Netlify CEO Matt Biilmann. He called it "the case study for how AI has buoyed some companies that predate it" and "the single most significant turn around I've directly witnessed" [3]. Konrad reports that Netlify was stagnating three years ago. It is now growing nearly 130% and will finish the year with $130M in ARR, after "re-founding" itself around non-developer users who are new to AI [4].

O'Shaughnessy: Casey Handmer's AI audit of astrophysics

Patrick O'Shaughnessy shared Casey Handmer's physics survey. He called Handmer "one of the more creative users" across his projects and said someone should give him unlimited tokens [5]. Handmer had Opus 5.5 audit theoretical astrophysics. The project indexed about 150,000 papers, audited 50,000, and found nearly 1,000 major errors that were cited many times, most of them still uncorrected. Handmer concludes that peer review is "not very good" at correcting errors. He also says AI can speed up quantitative science by more than 1000x with no further model improvement [6].

Collison: *Works in Progress*, with human-made art

At a Semafor event, **Patrick Collison** told the audience to subscribe to *Works in Progress*, the magazine Stripe publishes [7]. He calls Stripe "about as AI forward as a company can be," yet all the art for Stripe Press and the magazine is made by humans. His reason: people "want to know what humans chose to depict," and with AI art "the product would be worse" [7]. Video

Armstrong: a Senra conversation, and the Civilization tech tree

Brian Armstrong called his conversation with David Senra "another great chat." He said it covers self-programming, the game of business, how AI is changing work, and why the public fears AI [8]. Chapters include "Giving agents a job instead of a prompt" and his prediction that 99.999% of transactions will be agent-to-agent in 10 years. Senra's post notes the episode includes paid partnerships [9].

On another podcast, Armstrong said he keeps a printout of the *Civilization* tech tree in his home office because it is "such a fascinating concept." Playing the game made him want to "add a leaf to the tech tree" [10]. He also likes that it has several ways to win and "so many layers," and says you can learn simple strategies from it [10]. Video

Shorter picks

- **Brad Gerstner** called O'Shaughnessy's episode with Geoffrey Canada a "MUST listen" for understanding "the pulse of America - the fear, the anxiety & the hope." Gerstner is part of the conversation himself [11]. The episode was covered in the previous brief.
- **Jason Lemkin** shared SaaStr's piece on Palantir. His takeaway is that Palantir "proves NDR does not necessarily have to come down at scale." The piece cites 165% net dollar retention [12, 13]. SaaStr is Lemkin's own company.
- **Elon Musk** pointed followers to Poteto's guide *Automate Anything with Grok Bot*, with the advice "Treat Grok Bot like a really smart employee"

[14]. The guide lays out the author's approach to automation at work and in personal life [15]. Grok is an xAI product, so Musk is promoting his own company's tool.

- **A Ramp co-founder**, in a YouTube interview, said he and Kareem read Paul Graham's essays and watched early Startup School videos while working as a banker and a consultant. His takeaway from PG's essay on how to get startup ideas was to "notice problems in your regular life" [16].

Sources

1. X post by @chamath
2. X post by @socialcapital
3. X post by @martin_casado
4. X post by @alexrkonrad
5. X post by @patrick_oshag
6. X post by @CJHandmer
7. Stripe CEO Patrick Collison at Silicon Valley & The World | Semafor
8. X post by @brian_armstrong
9. X post by @davidsenra
10. Why Now Is The Golden Age of Building | Brian Armstrong, Coinbase
11. X post by @altcap
12. X post by @jasonlk
13. X post by @saastr
14. X post by @elonmusk
15. X article by @poteto
16. Ramp's Bet on the 100x Employee