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Recommended Reading from Tech Founders

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Three investors shared Will Manidis's new long-form outlook on capital and sovereignty. Martin Casado called one agent-harness talk a must-watch, and other picks covered an AI-native company playbook, a factory-tour series and strength training.

Will Manidis's *The Commanding Heights*

Will Manidis released *The Commanding Heights*, the result of what he calls a year of "writing about capital, sovereignty, and the coming reordering of economic power." His framing line is that "the benefits of abundant intelligence will accrue far outside of San Francisco." [1] Three investors shared it:

- **Chamath Palihapitiya**: "I like Will's writings - I always learn something that helps me refine my mental models." [2]
- **Scott Belsky**: "A lot of ideas backed by observations and data in this outlook, beautifully written as always." [3]
- **Patrick O'Shaughnessy** replied with a list of companies, "Stripe, Meta, ICE, Shopify, Coinbase, Ramp, Cloudflare, WorkOS, Circle, Hyperliquid?", and then "Or, just Meta". It reads as a joking guess at the work's thesis. [4]

Martin Casado: a systems talk on agent harnesses

Martin Casado admits he is “a tad biased.” Still, he calls this YouTube talk “the best systems talk on agent harnesses,” covering “what it means to be self improving and bitter lesson aligned.” His verdict: “a must watch.” [5] In replies to @SeizeEndowments, he said the talk “shamelessly cribbed many of the ideas and the naming from your Exo Kernel work.” He also pointed to the main section at 20:13. [6, 7]

Vinod Khosla: “How I Built the Most AI-Pilled Company in the World”

Vinod Khosla called @jsnnsa’s X article “Impressive.” [8] The author says Spawn is ten people who “spend 30x payroll on AI tokens.” The company reports shipping 77,000 substantial changes in 30 days and spending \$3.1 million on tokens in a month. [9] Its “fleet” is a set of permanent agents. Each has a name, a memory and real system permissions, and each owns one area, such as the engine, finance or bug triage. [9] The author says they wrote it down because other founders wanted to know how Spawn thinks about this. [9]

Shorter picks

- **Sarah Guo** called Mike Schroepfer’s new *Field Trips* series a “super fun format with an uber-engineer.” [10] Schroepfer says touring factories and labs is one of his favorite parts of his job. The series opens with RhodaAI, Arbor Energy and Harbinger Motors. [11]
- **Tim Ferriss** shared Pavel Tsatsouline’s “Basic Tenets for Strength,” such as “Lift heavy, not hard” and keeping reps at five or fewer. [12] He singled out “Training is something that should be enjoyed” as literal advice: after a maximal-strength workout you should feel better than when you walked in, because “there is a huge neural component.” [12]
- **Garry Tan** shared Nancy Rommelmann’s monograph *The Gloss of Good Intentions: How Portland Blew a Chance to Become the Next Great American City*. She re-posted it after Portland’s Royal Sonesta Hotel reportedly sold for \$6.83M, down 93% from its 2016 price. [13] Tan called Portland “a cautionary tale” of what happens when no one pushes back on people “using national politics as a reason to destroy your local government.” [14]
- **Chamath** promoted his firm Social Capital’s deep dive, *Memory chip profits are exploding, so why are stocks below their highs?*. [15] It notes that big memory stocks are still down roughly 22–65% from their highs while profits climb. The question it asks is whether memory is becoming a franchise or heading into another boom-and-bust cycle. [15]
- **Tobi Lütke** said he “Really enjoyed” his conversation with Alex Heath. [16] Last edition covered his *Cryptonomicon* comment from this episode. Topics include why Amazon blocked Meta’s Muse while Shopify welcomed it, who pays when agents make purchases, and his GPU wine cellar. [17]

It's on YouTube and Spotify. [17]

Sources

1. X post by @WillManidis
2. X post by @chamath
3. X post by @scottbelsky
4. X post by @patrick_oshag
5. X post by @martin_casado
6. X post by @martin_casado
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