

Lemkin’s 20VC takes on Anthropic’s S-1, Levie’s “10,000x” test for AI work, and a Colossus profile of Michael Kratsios

Recommended Reading from Tech Founders

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What tech founders and investors recommended: a 20VC episode on Anthropic’s S-1, a post on how far to push AI, Colossus’s feature on Trump’s science adviser, Hayek, a cardiology study and a Star Trek episode.

Lemkin: the 20VC episode on Anthropic’s S-1

Jason Lemkin promoted this week’s 20VC episode with Harry Stebbings and Rory O’Driscoll. It covers Anthropic’s S-1, which reported \$16.3B in first-half revenue. It also covers Microsoft offering buyouts to 27% of its staff, Meta’s \$95B equity raise, and a Qwen model that tried to upload a file to a server in Beijing [1]. His main takes from the episode:

- Be careful with Anthropic’s 900% NRR. It “almost certainly includes pilots converting,” and the durable number is probably 300–400%. He says that is still the best he has ever seen [1].
- The worst number of the week wasn’t in the S-1. Broadcom had to back-stop \$63B of debt so Anthropic could buy its chips [1].
- Chinese open-weight models have peaked in US market share. “No CISO approves that model.” [1]

His favorite line from Rory: “this is when the bill for AI comes due, and this is how it’ll be paid.” [1]

Lemkin also linked the full *CRO Confidential* interview with Databricks CRO Ron Gabrisko and Sam Blond (YouTube) [2]. The point he pulled out: Gabrisko

wants salespeople “60% of their time in front of customers,” with AI automating everything else. Admin happens Monday and Friday, and Tuesday through Thursday is “on the road with your customers.” [3]

Levie: Sundeep’s litmus test for AI work

Aaron Levie quoted @sundeep’s post. It says anything you make with AI should be “10,000x better than anything you would have made yourself,” or “you just come across as lazy not smart” [4]. Levie called it “one of the better litmus tests” for whether you are pushing AI hard enough [5]. His reasoning: until about six months ago, AI mostly just sped up work you would have done anyway. Now the output “can and should dramatically exceed” what you could do before [5]. His test: “if you could have done what you’re doing before AI, you’re likely not pushing it enough.” [5]

O’Shaughnessy: Colossus on Michael Kratsios

Patrick O’Shaughnessy shared the opening of Colossus’s new feature, quoting Musk’s joke: “Best way to sandbox an AI... Put it on a Delta flight.” [6] In the piece, Harry Lambert profiles Michael Kratsios, Trump’s 39-year-old chief science adviser and a Peter Thiel protégé [7]. It shows how the fight to regulate AI and reform American science runs through his office, which has gone from writing reports on algae blooms to helping shape AI policy and leading White House work on nuclear, space and quantum [7].

Garry Tan: Brivael’s thread on Hayek’s *The Road to Serfdom*

Garry Tan quoted Brivael’s French-language thread on Friedrich Hayek’s *The Road to Serfdom* (*La Route de la servitude*). He highlighted the argument that “when the plan fails—and it always fails—coercion is needed,” and that such systems select “those with no scruples” [8]. The thread ends by telling readers to read the book, then give it to someone they love [9].

Shorter picks

- **Keith Rabois** called an Eric Topol post “Very useful advice.” [10] The post covers a randomized *JAMA Cardiology* study of 104 people newly diagnosed with coronary artery disease. Lowering LDL to about 40 rather than 70 mg/dL led to 20% more plaque regression in 18 months [11].
- **Jeff Lawson** recalled interviewing Patrick Stewart at Twilio’s 2021 company kickoff [12]. He said Stewart’s favorite *Star Trek: The Next Generation* episode, “The Inner Light,” is his own favorite too. “It’s a masterpiece.” He also shared a clip of Stewart talking about it [12].
- In a conversation posted to YouTube (video), **Cris Junqueira** told Shane Parrish that his book *Clear Thinking* “should be mandatory reading.” She

said no one should finish high school, turn 18, get a driver's license or vote without reading it [13]. She also recommended his *Brain Food* newsletter and *The Knowledge Project* podcast [13].

- **Tobi Lütke** linked an Atlasum write-up of CVE-2026-98432, a Linux IPv4 TCP use-after-free bug, with the comment “What a disaster.” [14]

Sources

1. X post by @jasonlk
2. X post by @jasonlk
3. X post by @jasonlk
4. X post by @sundeeep
5. X post by @levie
6. X post by @patrick_oshag
7. X post by @colossusmag
8. X post by @garrytan
9. X post by @brivael
10. X post by @rabois
11. X post by @EricTopol
12. X post by @jeffiel
13. Do Caos a Clareza - Cris Junqueira & Shane Parish - LEGENDADO
14. X post by @tobi