

Moats in the AI era, limits of software “silver bullets,” and leadership under pressure

Recommended Reading from Tech Founders

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Today’s strongest picks include Jeremy Howard’s reference to Fred Brooks’ “No Silver Bullet” as a direct counterpoint to modern “no more coders” narratives, plus a thoughtful essay on AI-era moats, a psychology evergreen, and standout recommendations on leadership, geopolitics, and capital allocation.

Most compelling recommendation: a reality check on “no more engineers” narratives

No Silver Bullet (essay) — Fred Brooks

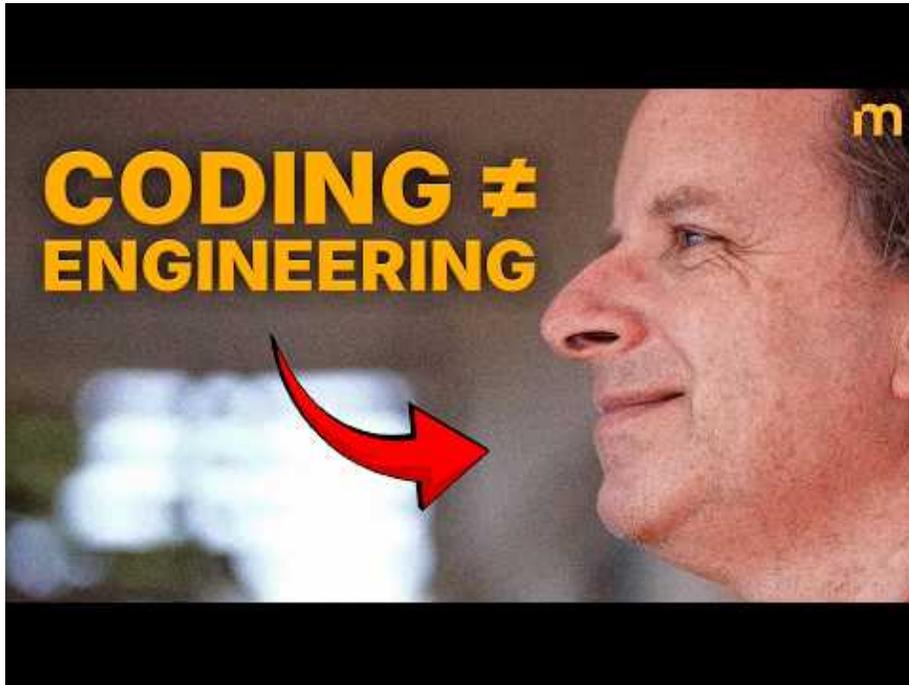
- **Link/URL:** Not provided (recommended in this video): <https://www.youtube.com/watch?v=dHBEQ-Ryo24> ¹
- **Recommended by:** Jeremy Howard ²
- **Key takeaway (as shared):** Howard points to Brooks’ “No Silver Bullet” as sounding like it was written for today—responding to claims that new tools would mean we “won’t need any coders anymore.” Brooks argued productivity gains would be limited (Howard cites Brooks’ “30% improvement” framing) and that most software engineering work isn’t typing code. ³
- **Why it matters:** It directly addresses the same premise driving current AI coding hype, and frames where the real bottlenecks may lie (beyond code entry). ⁴

¹“Vibe Coding is a Slot Machine” - Jeremy Howard

²“Vibe Coding is a Slot Machine” - Jeremy Howard

³“Vibe Coding is a Slot Machine” - Jeremy Howard

⁴“Vibe Coding is a Slot Machine” - Jeremy Howard



“Vibe Coding is a Slot Machine” - Jeremy Howard (28:23)

AI + product strategy: moats and psychology

“AI and Startup Moats” (essay) — Agam

- **Link/URL:** <https://unzip.dev/0x01f-ai-and-startup-moats/> ⁵
- **Recommended by:** Ryan Hoover (Product Hunt) ⁶
- **Key takeaway (as shared):** Hoover calls it a “thoughtful essay” on how moats are changing. ⁷
- **Why it matters:** A direct pointer to a single, focused argument about defensibility in an AI-shifting landscape (without being framed as promotion). ⁸

Hooked: How to Build Habit-Forming Products (book) — Nir Eyal

- **Link/URL:** Not provided ⁹
- **Recommended by:** Ryan Hoover ¹⁰

⁵ post by @rrhoover

⁶ post by @rrhoover

⁷ post by @rrhoover

⁸ post by @rrhoover

⁹ post by @rrhoover

¹⁰ post by @rrhoover

- **Key takeaway (as shared):** Hoover argues that “what won’t change” is human nature, and that a deep understanding of psychology is “evergreen” across roles—even as technology changes. ¹¹
- **Why it matters:** It’s recommended as durable foundational knowledge (human behavior) rather than a tool-specific tactic. ¹²

Building teams that compound: “slope” and hands-on intuition

“A Little Bit of Slope Makes up for a lot of Intercept” (lecture) — John Osterhout

- **Link/URL:** Not provided (recommended in this video): <https://www.youtube.com/watch?v=dHBEQ-Ryo24> ¹³
- **Recommended by:** Jeremy Howard ¹⁴
- **Key takeaway (as shared):** Howard summarizes Osterhout’s idea: prioritize activities that increase your growth rate (“slope”) over things you’re already good at (“high intercept”). He adds that for his company, he focuses on his team’s “slope.” ¹⁵
- **Why it matters:** It’s a crisp framework for evaluating work and development: optimize for compounding capability, not just near-term output. ¹⁶

Brett Victor’s work (talks/demos) — Brett Victor

- **Link/URL:** Not provided ¹⁷
- **Recommended by:** Jeremy Howard ¹⁸
- **Key takeaway (as shared):** Howard says Victor best expresses the importance of a “direct, visceral connection” with the thing you’re working on, and encourages people who haven’t watched Victor to do so. ¹⁹
- **Why it matters:** It highlights a learning principle that’s easy to lose in modern tooling: staying close to the system you’re building to develop intuition. ²⁰

¹¹ post by @rrhoover

¹² post by @rrhoover

¹³“Vibe Coding is a Slot Machine” - Jeremy Howard

¹⁴“Vibe Coding is a Slot Machine” - Jeremy Howard

¹⁵“Vibe Coding is a Slot Machine” - Jeremy Howard

¹⁶“Vibe Coding is a Slot Machine” - Jeremy Howard

¹⁷“Vibe Coding is a Slot Machine” - Jeremy Howard

¹⁸“Vibe Coding is a Slot Machine” - Jeremy Howard

¹⁹“Vibe Coding is a Slot Machine” - Jeremy Howard

²⁰“Vibe Coding is a Slot Machine” - Jeremy Howard

Investing: why “process” isn’t the whole story

Capital Allocators episode featuring Gavin Baker (podcast episode)

- **Link/URL:** <https://podcasts.apple.com/us/podcast/capital-allocators-inside-the-institutional/id1223764016?i=1000752436222> ²¹
- **Recommended by:** Ian Cassel (shared), endorsed by Keith Rabois (“This.”) ²²²³
- **Key takeaway (as shared):** The post argues that while a repeatable process matters, any repeatable edge that produces significant alpha gets “quickly arbed away.” It suggests repeatable outperformance often comes from a small number of key people (estimated “2–10”)—illustrated via a Michael Jordan / Bulls analogy. ²⁴
- **Why it matters:** It’s a concrete lens for evaluating investment organizations (and teams) beyond process narratives: who are the few individuals that actually drive outcomes? ²⁵

Geopolitics and competition

Breakneck (book) — Dan Wynn

- **Link/URL:** Not provided (recommended in this episode): <https://www.youtube.com/watch?v=s830OB1> ²⁶
- **Recommended by:** Garry Tan (Y Combinator) ²⁷
- **Key takeaway (as shared):** Tan recommends *Breakneck* as a book about China vs. the US, calling it “incredible,” with another participant adding: “It’s really good.” ²⁸²⁹
- **Why it matters:** A clear signal that this is a high-quality read (per Tan) for thinking about US–China dynamics in a period where many founders/investors are reassessing national competitiveness. ³⁰

²¹ post by @iancassel

²² post by @iancassel

²³ post by @rabois

²⁴ post by @iancassel

²⁵ post by @iancassel

²⁶Y Combinator in the Age of AI | Ep. 43

²⁷Y Combinator in the Age of AI | Ep. 43

²⁸Y Combinator in the Age of AI | Ep. 43

²⁹Y Combinator in the Age of AI | Ep. 43

³⁰Y Combinator in the Age of AI | Ep. 43

Leadership under pressure

Lee Kuan Yew speech on handling a strike (speech/video)

- **Link/URL:** Not provided (recommendation shared here): <https://x.com/davidsenra/status/2028952451>.³¹
- **Recommended by:** Brian Armstrong (Coinbase)³²³³
- **Key takeaway (as shared):** Armstrong describes a Lee Kuan Yew speech as “great,” and highlights the stance of being willing to “rebuild it all from scratch” rather than “allow you to bring this country down.” He says it’s “very inspiring” and something he feels he needs to do as a leader.³⁴³⁵
- **Why it matters:** A rare example of a founder pointing to a specific leadership moment as a personal benchmark for decisiveness and resolve.³⁶

“I sat across the table from them and said get back to work. I will not allow you to bring this country down. And if you don’t do it, I’m prepared to rebuild it all from scratch again.”³⁷

Sources

1. “Vibe Coding is a Slot Machine” - Jeremy Howard
2. post by @rrhoover
3. post by @rrhoover
4. post by @iancassel
5. post by @rabois
6. Y Combinator in the Age of AI | Ep. 43
7. post by @davidsenra

³¹ post by @davidsenra

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³⁴ post by @davidsenra

³⁵ post by @davidsenra

³⁶ post by @davidsenra

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