Progress, permissions, and evidence: Stripe's agentic-commerce framework, an AI narrative check, and a nutrigenomics breakthrough

Recommended Reading from Tech Founders

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Progress, permissions, and evidence: Stripe's agentic-commerce framework, an AI narrative check, and a nutrigenomics breakthrough

By Recommended Reading from Tech Founders • February 28, 2026

Today's strongest cluster is "progress and its constraints": a standout recommendation of Stripe's 2025 Annual Letter for its agentic-commerce levels and regulatory framing, plus a companion "build fast" resource list. Also included: a check on AI overconfidence via Derek Thompson, a high-impact Arc/Cell nutrigenomics paper, and a history prompt from Keith Rabois.

Most compelling recommendation: Stripe's 2025 Annual Letter — a concrete framework for "agentic commerce" (plus real payments data)

Stripe's 2025 Annual Letter (annual letter) — Patrick and John Collison

- **Link/URL**: https://x.com/stripe/status/2026294241450979364?s=20 [1]
- **Recommended by**: Packy McCormick (*Not Boring*) [2]
- **Key takeaway (as shared)**:
  - Packy calls it "one of the best pieces of economic writing you'll read all year," citing Stripe's view into the internet economy via its data and writing [3].
  - He highlights Stripe's **"agentic commerce"** framework: five levels, from agents that merely fill checkout forms to agents that anticipate

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needs and buy before you ask—while noting we're "hovering between levels 1 and 2" [4].

  – He pulls out the "Republic of Permissions" idea: technology success depends on whether regulators, committees, and courts allow deployment [5].

- **Why it matters**: This is a rare combination of **a staged framework** (how agent-driven buying might evolve) plus **operational-market observations** about the constraints that can block adoption [67].

A second layer in the same theme: building fast vs. a "Republic of Permissions"

"Fast" projects list (article/resource list) — Patrick Collison

- **Link/URL**: https://patrickcollison.com/fast [8]
- **Recommended by**: Packy McCormick (*Not Boring*) [9]
- **Key takeaway (as shared)**: Packy frames it as the "canonical list of projects from a time when we were able to build fast" [10].
- **Why it matters**: Paired with the "Republic of Permissions" framing, it's a useful contrast: **what rapid building looked like** vs. the modern environment where permissions can determine outcomes [1112].

AI discourse: a pushback against overconfident forecasting

"Nobody Knows Anything" (article) — Derek Thompson

- **Link/URL**: Not provided in the sources
- **Recommended by**: David Sacks (on a YouTube podcast episode) [13]
- **Key takeaway (as shared)**: Sacks points to Thompson's argument that no one really knows what will happen with AI in two years (let alone 20), and that AI debate can become "science fiction writing masquerading as analysis" — a "marketplace of competing science fiction narratives" amid high uncertainty and limited real-time macro evidence [14].
- **Why it matters**: This is a reading pick that implicitly **raises the bar on evidence** when evaluating big AI claims—and is useful as a lens for

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separating narrative from analysis [15].

Software Stocks Implode, Claude's Hit List, State of the Union Reactions, Trump's Tariff Pivot (10:22)

Research: a nutrigenomics result worth reading end-to-end

"Vitamin B2 and B3 nutrigenomics reveals a therapy for NAXD disease" (research paper; *Cell*) — Arc Institute

- **Link/URL**: https://www.cell.com/cell/fulltext/S0092-8674(26)00109-1 [16]
- **Recommended by**: Packy McCormick, via Ulkar Aghayeva's *Scientific Breakthroughs* curation [17]
- **Key takeaway (as shared)**:
  - The work runs a genome-wide CRISPR screen (in K562 cancer cells) using vitamins **B2 and B3** to identify genetic diseases responsive to vitamin supplementation; **NAXD** emerged as the top hit for vitamin **B3** [18].

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[15] Software Stocks Implode, Claude's Hit List, State of the Union Reactions, Trump's Tariff Pivot

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- The team reports that adding vitamin B3 to knockout mice food from birth increased lifespan **more than 40-fold** [19].
- **Why it matters**: It's a concrete example of how "vitamin biology" may still contain "unexplored territory in nutritional genomics," and it raises the question of how many diseases might be addressable through similar supplementation strategies [20].

Additional source links surfaced alongside the recommendation: - Arc Institute blogpost: https://arcinstitute.org/news/vitamin-hunters [21] - Arc Institute X thread: https://x.com/arcinstitute/status/2026691239400370666?s=20 [22]

History (as a prompt, not a thesis)

"Secret History" (article/blog post) — Steve Blank

- **Link/URL**: https://steveblank.com/secret-history/ [23]
- **Recommended by**: Keith Rabois (X) [24]
- **Key takeaway (as shared)**: Rabois frames it as "Time for some of you to learn history" and points directly to Blank's post [25].
- **Why it matters**: A direct nudge from an investor to revisit a specific historical account—useful when you want to anchor current debates in prior cycles rather than novelty alone [26].

Lower-signal but notable: a book recommendation framed as a gift

Running Down a Dream (book) — Bill Gurley

- **Link/URL**: Not provided in the sources
- **Recommended by**: Jason Calacanis (with agreement from Chamath) on a YouTube podcast episode [27]
- **Key takeaway (as shared)**: Calacanis calls it an "amazing new book," urges people to "buy three copies" to give to "two young people and a parent," and describes it as "inspiring for kids"; Chamath adds: "this book is incredible" [28].
- **Why it matters**: While the endorsement is strong, it's light on specifics; the clearest signal here is *intended audience and use*: a book they see as

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[21] Weekly Dose of Optimism #182
[22] Weekly Dose of Optimism #182
[23] post by @rabois
[24] post by @rabois
[25] post by @rabois
[26] post by @rabois
[27] Software Stocks Implode, Claude's Hit List, State of the Union Reactions, Trump's Tariff Pivot
[28] Software Stocks Implode, Claude's Hit List, State of the Union Reactions, Trump's Tariff Pivot

worth distributing to younger readers and families [29].

Sources

1. Weekly Dose of Optimism #182
2. Software Stocks Implode, Claude's Hit List, State of the Union Reactions, Trump's Tariff Pivot
3. post by @rabois

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[29]Software Stocks Implode, Claude's Hit List, State of the Union Reactions, Trump's Tariff Pivot