

# Resources on Research Agents, Clear Thinking, and Testing a Thesis

Recommended Reading from Tech Founders

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Aravind Srinivas highlights a podcast on using agents for financial research, while Shane Parrish recommends enduring reads on clarity and self-imposed limits. Patrick O'Shaughnessy adds an investment letter designed to confront natural-gas objections, and Brian Armstrong points to a long-horizon Balaji Srinivasan talk.

### Most compelling: a practical entry point for AI-assisted financial research

*Fintech Blueprint* episode with Jeff Grimes

- **Content type:** Podcast episode
- **Author/creator:** Not identified in the supplied material; episode features Jeff Grimes
- **Link:** Listen to the episode
- **Recommended by:** Aravind Srinivas
- **Key takeaway:** Srinivas calls it worth listening to for people who want to understand how to use agents for financial research. [1, 2]
- **Why it matters:** This is the clearest application-oriented recommendation in the material: a resource explicitly selected for the financial-research use case rather than general AI discussion.

### Reading for clearer communication and self-directed action

*Politics and the English Language* — George Orwell

- **Content type:** Essay
- **Author:** George Orwell

- **Link:** No direct essay URL was supplied; watch the source interview
- **Recommended by:** Shane Parrish
- **Key takeaway:** Parrish says that early in his career, he asked everyone on his team to read Orwell’s essay; the recommendation is framed as a guardrail against vague corporate language and in favor of clear communication. [3]
- **Why it matters:** It is an unusually concrete team-level reading recommendation, not simply a personal mention.

### *The Courage to Be Disliked*

- **Content type:** Book
- **Author:** Not identified in the supplied material
- **Link:** No direct book URL was supplied; watch the source interview
- **Recommended by:** Shane Parrish
- **Key takeaway:** Parrish calls it “an excellent book” that everyone should read, in a discussion of how people often optimize to avoid being disliked and impose limits on themselves. [3]
- **Why it matters:** The recommendation connects discomfort and independence of judgment to pursuing a mission or goal rather than approval.

## A research letter built around the objections

### *Matthew’s letter* — Matthew Smith, CIO of Chronometer Partners

- **Content type:** Investment/research letter
- **Link:** No direct letter URL was supplied; read Patrick O’Shaughnessy’s source post
- **Recommended by:** Patrick O’Shaughnessy
- **Key takeaway:** O’Shaughnessy recommends reading the letter in full, highlighting its appendix of anticipated pushback and responses on gas resources, midstream infrastructure, power demand, and LNG. The appendix argues, among other points, that recoverable resource is not necessarily economic production; new infrastructure takes years; incremental gas-fired generation adds to a projected post-2027 deficit; and LNG commitments are generally long-lived and difficult to unwind. [4]
- **Why it matters:** Rather than presenting only a directional thesis, the letter is recommended specifically for engaging with the principal objections across the natural-gas value chain.

## Long-horizon video signal

### Balaji Srinivasan talk

- **Content type:** Video/talk
- **Creator:** Balaji Srinivasan
- **Link:** Watch on YouTube

- **Recommended by:** Brian Armstrong
  - **Key takeaway:** Armstrong describes the talk as “legendary,” says he was in the audience 12 years ago, and is impressed that Balaji is now making its ideas real. [5, 6]
  - **Why it matters:** Armstrong’s recommendation is grounded in firsthand, long-term perspective. The supplied material does not identify the talk’s subject, so no more specific interpretation is included.
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## Sources

1. X post by @AravSrinivas
2. X post by @jeffgrimes9
3. \$4.6B CEO: Excellence Is the Capacity to Take Pain
4. X post by @patrick\_oshag
5. X post by @brian\_armstrong
6. X post by @brian\_armstrong