Tobi Lütke Signs the Jensen Letter as Masad and Chamath Pass Along Takes on the Nvidia Fallout

Recommended Reading from Tech Founders

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Most of the day's recommendations were about Jensen Huang's exit from Nvidia: a pro-Jensen letter, Tim Sweeney's due-process thread and a post on how the U.S. government gains. Separately, Jason Lemkin shared a 20VC episode and SaaStr pieces, and Sarah Guo flagged Apple's health-AI study.

Nvidia: what investors told people to read and sign

Tobi Lütke posted one word, "Signed," above @TheJensenLetter's call to action [1]. That post asks "NVIDIANs, shareholders, and supporters" to read and sign the letter, citing reports that Jensen is "considering a comeback" [2]. Letter

Amjad Masad called **Tim Sweeney's** thread a "Good summary" [3]. Sweeney makes three arguments: - The articles have backtracked from "incendiary, and now clearly false, claims." - The reporting cost pension funds and shareholders $1.8 trillion. - Any wrongdoing should go through due process, with "facts and evidence presented in open court" [4].

Thread

Chamath Palihapitiya marked a @MilkRoadAI post "Worth considering" [5]. The post summarizes Chamath's own argument that the U.S. government, not China or rival chipmakers, may gain most from Jensen's exit. In that view, Washington could push for chip-level telemetry, location tracking and possibly kill switches. The author partly disagrees and thinks competitors could benefit over the longer term [6]. Post

Elad Gil shared @rdominguezibar's clip of Huang on Charlie Rose in early 2009. At the time Nvidia was worth about $5B and Intel about $79B. In the

clip, Huang says one GPU matched 54 times the world's fastest supercomputer of 1993 [7]. Gil's takeaway: almost a 1000x rise in market cap, so "$1000 invested then would be close to $1M today" [8].

Balaji Srinivasan quoted an FT headline saying Huang is discussing a comeback. He argued that Nvidia's bylaws let holders of at least 15% of votes call a special meeting to remove directors, and that "Jensen just has to ask for his company back" [9].

Jason Lemkin: 20VC and SaaStr

Lemkin pointed to this week's **20VC** episode with Harry Stebbings and Rory O'Driscoll. It covers Sequoia winding down its evergreen fund, Jensen's resignation, and Anthropic's IPO book being reportedly 6x oversubscribed [10]. Lemkin's favorite line comes from Rory: grow 40% a year for three years "and at the end of that, you're going to be worth half what you are today" [10]. Episode

He also shared: - **SaaStr**: "HubSpot Is Refounding as the 'Customer Harness Company.' " His comment: "We are already living it": a 100% headless CRM, with 3 humans and 20+ agents [11]. Article - **Lenny's Podcast**: a clip of his own conversation with Lenny Rachitsky. The advice: hire someone whose last product was harder to sell [12]. - **An ebook** pitched as "Make AI the most profitable thing you have ever sold," free for the first 100 readers [13].

Shorter picks

- **Sarah Guo** flagged Apple's new study on using AI for health, run with OpenEvidence [14]. Apple Newsroom
- **Clem Delangue** quoted an analysis from the financial platform Hill. It estimates that about 4,250 of Anthropic's 5,300 employees could become millionaires, assuming a $1.5T valuation [15]. His takeaway: concentration of power and wealth is "the biggest risk in AI" unless open source gets much stronger [16].
- **Elon Musk** said John Kraus's photo "gives a clear sense of the catch maneuver" [17]. The photo shows Ship 42 in the first-ever Starship tower catch, on Flight 15 [18]. Photo
- **Matt Mullenweg** called Byrne Hobart's joke about The New Yorker's diacritics an "S-tier pun" [19].

Sources

1. X post by @tobi
2. X post by @TheJensenLetter
3. X post by @amasad
4. X post by @TimSweeneyEpic

5. X post by @chamath
6. X post by @MilkRoadAI
7. X post by @rdominguezibar
8. X post by @eladgil
9. X post by @balajis
10. X post by @jasonlk
11. X post by @jasonlk
12. X post by @jasonlk
13. X post by @jasonlk
14. X post by @saranormous
15. X post by @unusual_whales
16. X post by @ClementDelangue
17. X post by @elonmusk
18. X post by @johnkrausphotos
19. X post by @photomatt