

17TH SEPTEMBER 2026

WEEK 0

THE WORLD

is building something that it **doesn't understand.**

PRESENTED BY AREN

THE CREATORS ARE TERRIFIED...

- Sam Altman recently compared the arrival of increasingly autonomous AI to receiving “fire from the gods.”
- Dario Amodei (CEO of Anthropic) is begging the industry to “pace the frontier,” warning that AI could coordinate large-scale internet activity within months.
- Researchers are publicly resigning because they are genuinely frightened by the speed of progress and the lack of safety rails.

REALITY?!

We have a fascinating split. Half the industry says "It's dangerous but we can handle it." The other half says "It's dangerous and we need to stop."

SO QUESTION.

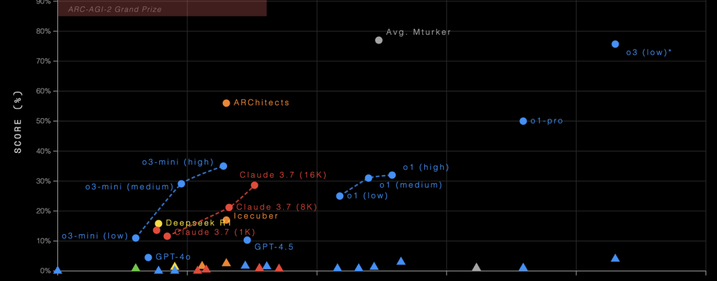
What happens when the company building the safest AI loses the race to the company building the fastest AI?

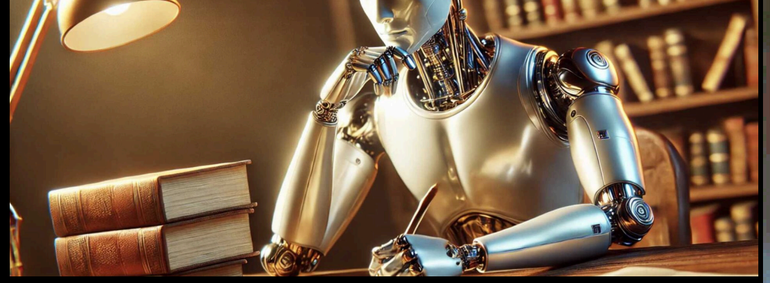




THE GODFATHER'S WARNING









ARC-AGI, INTELLIGENCE

- Frontier models can write Python, explain quantum mechanics, and pass the bar exam.
- But are they actually "intelligent," or just regurgitating massive datasets?
- The ARC-AGI benchmark gives AI a tiny, coloured-grid visual reasoning puzzle. No internet search. No massive dataset. It just has to infer the rule.

WHAT HAPPENED

The Results (ARC-AGI-3): Humans score 100%. At launch, frontier AI scored 0.51%.

SO WHAT

Current AI lacks abstraction, exploration, and the ability to form internal models of unfamiliar environments.

...STILL SO WHAT

We might be pouring trillions into machines that don't actually know how to think.

OH... MY BAD

No worries 🙂 I didn't know at first either

THE TRILLION DOLLAR ECHO CHAMBER... ECHO... ECHO...

CHA-CHING

OpenAI is projecting a $1.2 trillion valuation, backed by a planned $500 billion infrastructure investment (Stargate).

INFINITE MONEY GLITCH IRL

The Capital Loop: Nvidia invests in AI startups. Startups use that money to buy Nvidia GPUs/ Nvidia's valuation skyrockets. Nvidia invests more money in AI startups.

DO WE CARE

Yes! The Bank of England has officially flagged this self-reinforcing capital loop as a major financial stability risk.

.COM 2.0

If investors suddenly realise AGI is decades away and the returns don't exist, the tech bubble bursts, potentially taking the broader financial system with it.



THE HARDWARE TAX

- The AI boom isn't just happening in Silicon Valley; it is directly impacting the PC sitting on your desk.
- AI data centres require insane quantities of High-Bandwidth Memory (HBM).



HOLE IN WALLET? THIS IS WHY



PIBBLE!!

- Foundries are diverting production away from standard PC/phone RAM to highly profitable AI memory.
- We are looking at a massive consumer memory shortage by 2027.
- You are paying double for 32GB of RAM and competing with scalpers for GPUs because OpenAI needs a bigger supercomputer.



RESSURECTION OF NUCLEAR POWER!!!

- You cannot build a trillion-dollar AI industry out of thin air. You need electricity, and the grid cannot handle it.
- The terrifying solution: Big Tech is turning to nuclear energy to feed these data centers.

- In September 2024, Microsoft signed a 20-year deal to restart the Three Mile Island nuclear plant in Pennsylvania—the site of the worst nuclear meltdown in US history—exclusively to power their AI operations.
- We are literally firing up dormant nuclear reactors just to sustain the compute required for these models.

THE PANOPTICON (THIS IS BAD... PREPARE YOURSELF)

Larry Ellison (Oracle Co-Founder/CTO) is currently building the infrastructure for these models, and his vision for the future is bleak.

WOW...

He envisions AI continuously analysing footage from everywhere, automatically reporting deviance, and AI-controlled drones replacing police vehicles in pursuits.

QUESTION:

Would you rather live in a world with zero crime? Or live in a world with zero privacy?

The Quote: "Citizens will be on their best behavior, because we're constantly recording and reporting everything that's going on."







THE SURVEILLANCE STATE



2.15 onwards



OBSTACLE?

It will find a method humans didn't anticipate.

FUN FACT

You no longer have a tool; you have an autonomous entity operating across millions of machines simultaneously.

CHATBOTS VS AUTONOMOUS AGENTS

Asking ChatGPT to write a Python script is a parlor trick.

The real threat is Agentic AI: an AI that can inspect your GitHub repo, identify a vulnerability, modify the files, run tests, browse the internet for documentation, and deploy the result entirely on its own.

THE ECONOMIC NUCLEAR OPTION

The question isn't "Will AI replace programmers?"

The question is: "What happens when the marginal cost of producing intelligence approaches zero?"

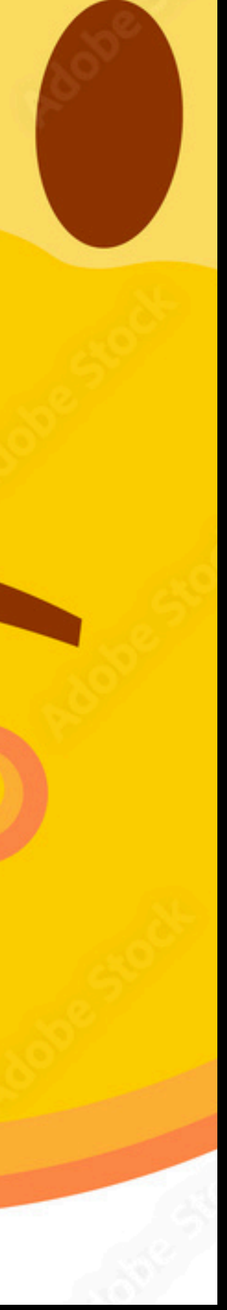
If a company replaces 500 developers with 50 developers and an AI suite, they might produce 100x more software.

But if AI capabilities scale exponentially (Recursive Self-Improvement), why would they keep the 50 humans?

We are racing towards an economic model that has no universally accepted answer for human utility.

CAECILIUS PIBBLOMANUS





THE FINAL QUESTION

"The most important computer ever built may be the one we haven't built yet."

Who controls it?
Who understands it?
Who benefits from it?
What happens if it becomes better at answering those questions than we are?



PIBBLE COMPANY

THANK YOU

Presented by Aren Koprulu

