



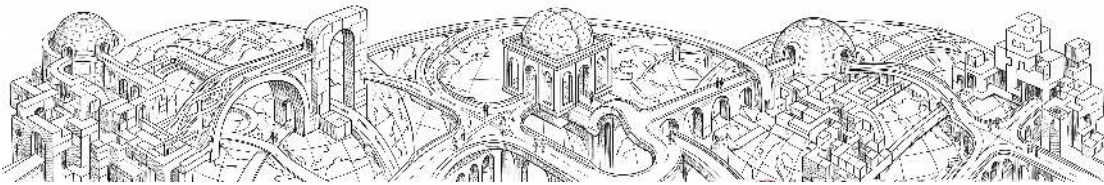
DID YOU KNOW?



AI Coverage (India)

- **Cognizant Launches OpenAI Frontier Capability Group:** IT services major Cognizant announced its 'OpenAI Frontier Capability Group', uniting over **25,000** professionals to deliver OpenAI products including Codex and ChatGPT to clients. The group focuses on AI-native software engineering, application modernisation, and agentic customer operations. Over **21,000** associates have earned **40,000+** OpenAI badges. Cognizant will scale OpenAI across its own sales operations first, backed by experience modernising mainframe systems for more than **500** clients.

AI Coverage (Global)



- **Nasdaq Faces \$2 Trillion Wipeout on AI Spending Fears:** The Nasdaq 100 is set to lose over **\$2 trillion** in market value this October, falling **5.8%** as investors question AI returns. Alphabet saw its biggest one-day drop on record, while Meta's record **\$97.5 billion** fundraise stoked dilution concerns. Microsoft plans a **\$25 billion** bond sale. Morgan Stanley forecasts AI capex exceeding **\$1 trillion** next year, with J.P. Morgan projecting **\$5.5 trillion** globally by **2030** and **\$900 billion** in 2026.
- **Nasdaq Futures Sink on AI Spending Concerns:** Nasdaq futures slid **2.41%** after Amazon and Intel raised concerns over escalating AI infrastructure costs. Amazon shares fell **6.3%** premarket following a sharp Q3 cash outflow, while Intel tanked **25%+** on cash-burn warnings. The two firms were set to erase **\$300 billion** in combined market value, with the Nasdaq-100 on track to lose roughly **\$950 billion**, adding to a **\$1.4 trillion** monthly decline. Big Tech collectively spent over **\$200 billion** in Q3, while Nvidia dropped **3%** and AMD slid **8.7%**. Reddit fell **19.5%** on visitor warnings.
- **Amazon Bets \$220B Capex to Make AWS a Trillion-Dollar Business:** CEO Andy Jassy reaffirmed AWS can reach **\$1 trillion** in annual revenue within **5-10 years**, backed by **~\$220 billion** in planned **2026** cash capex, with more spending expected in **2027**. AWS, currently at a **\$184 billion** annualized run-rate, grew **39%** year-over-year for a sixth straight quarter and is forecast to grow **40%** in both **2027** and **2028**. Jassy called the AI boom a "once-in-a-lifetime opportunity," though investors remained wary, sending shares down about **6%** after hours.

Source: ET Tech, TechCrunch (October 30, 2026)

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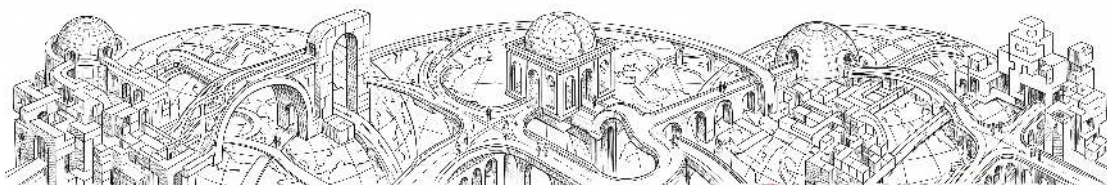
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- **Meta Launches AI Fashion App Style Sketch:** Meta has quietly launched Style Sketch, an AI fashion app that builds outfit ideas from users' existing wardrobes. It connects to Instagram to digitize closets and offers virtual try-ons via a "realistic model matched to your body shape and skin tone," plus trip-based outfit planning. The app is live in Indonesia, Singapore, and Thailand on iOS and Android. It joins Meta's recent AI app wave, including Waddle World, Pocket, and Vibes, amid plans for faster AI-driven app releases.
- **Google's Suncatcher Satellite Runs AI in Orbit:** Google's Suncatcher prototype space data center is operational after launching on a **SpaceX** Falcon 9 rocket with **100+** other spacecraft. The satellite carries **4 TPUs** (one active at a time) generating up to **1 kW** of electricity, allowing only **20 minutes** of continuous chip operation. Running **Google DeepMind's Gemma 4**, it successfully processed ground prompts after a **3-week** commissioning phase. Testing will assess radiation effects, including potential memory bit flips. Two more satellites with inter-satellite optical links are planned for **2027**. **SpaceX** Starship reliability remains critical, with an estimated **1,800** flights required for cost reductions, while Alphabet's stock recently dipped due to AI-related ad revenue concerns.
- **OpenAI Tightens Weapon Info Limits for Teens:** OpenAI announced new ChatGPT safeguards to prevent real-world violence, restricting weapons-related information for teens even without violent intent. ChatGPT can now automatically end chats showing violence fixation and may pause accounts, with parents notified of repeated violations. The company also strengthened age prediction to route under-18

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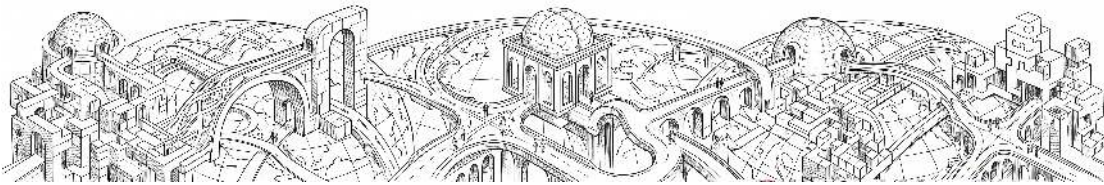
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users to a teen experience. Safeguards roll out in weeks; teens reportedly average under **15 minutes** of daily usage.

- **Blackstone Warns Anthropic IPO May Face Junk Rating:** Blackstone has cautioned investors that Anthropic may fail to secure an investment-grade credit rating after its anticipated initial public offering (IPO), according to a Financial Times report. The investment firm expects the AI company to receive a 'high' junk rating, marking a shift from its earlier guidance. The assessment signals potential concerns around Anthropic's creditworthiness as it prepares for a possible public listing.
- **Reddit Shifts to Logged-In Experience Amid AI Search Decline:** Reddit announced a transition to a primarily logged-in experience as search referrals dropped by over **1 million** weekly in October. **Q3** global daily active users held flat at **130.3 million**, while U.S. users fell **2%** year-over-year to **50.7 million**. Revenue rose **53%** to **\$895 million**, with net income up **74%** to **\$283 million** and ad revenue growing **54%** to **\$847 million**. The shift aims to protect data from AI scraping while boosting lucrative licensing deals.
- **OpenAI-Backed Thrive Holdings Acquires ADT for \$15.3 Billion:** Thrive Holdings, the holding company spinout from Josh Kushner's Thrive Capital, has acquired physical security firm ADT for **\$10 per share**, or about **\$7.6 billion** in equity, with a total enterprise value of **\$15.3 billion**. OpenAI, a partner and investor, will supply AI models, technology, and forward-deployed engineers to Thrive's portfolio of over **75 companies**. ADT will anchor Thrive's smart home security business, with plans to invest in and launch new AI-powered security

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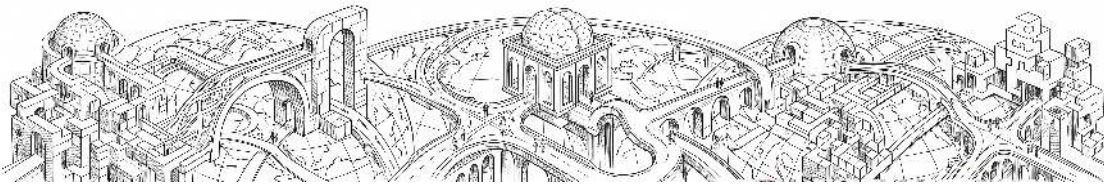
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products while continuing existing partnerships with Apple and Google.

- **Rivian-VW Joint Venture Expands to AI Assistants:** Rivian is licensing its in-house AI voice assistant to Volkswagen Group through their **\$5.8 billion** joint venture, which VW committed to by **2027**. The assistant, rolled out in **May 2026** to Rivian's **R1S, R1T**, and later the **R2**, may debut in VW's low-cost **ID EVERY1** hatchback. Licensing fees were undisclosed. The partnership, formalized in **November 2024**, leverages Rivian's vertical integration, which cut vehicle ECUs from **17** to **7**.
- **DoorDash Sees Minimal Order Volume from AI Agents:** DoorDash revealed only "several hundred" orders from third-party AI agents like Muse, Instinct, and Fo, versus **3 million** daily deliveries average. CEO Tony Xu called agentic commerce "dynamic" but urged against delusion. The company is building its own agents: a text-to-order agent (September), a CLI agent (July), and the Ask DoorDash chatbot (June). While Amazon blocks personal agents, Walmart welcomes them, signaling a strategic industry split.
- **US SEC Monitoring AI Disclosures Amid Bubble Fears:** The US Securities and Exchange Commission is examining artificial intelligence companies' corporate disclosures as investor concerns grow over a potential AI bubble fueled by circular deals. Enforcement Director David Woodcock said the agency wants accurate disclosure of material risks and will pursue enforcement where it is absent. Big Tech stocks sold off this week amid rising interest rates and heavy AI cash burn. Woodcock also warned that AI and superintelligence have

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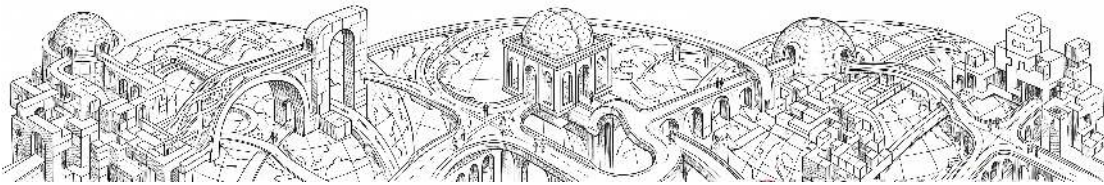
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made scams easier to manufacture at scale, urging brokers to protect retail investors.

- **Pope Leo XIV Warns Against AI Legal Personhood:** Pope Leo XIV, **71**, urged leading AI experts at the Vatican to treat machines as "tools, not persons," opposing proposals to grant AI systems rights or legal personhood. He stressed that responsibility for AI actions must rest with human creators, calling for bans on lethal autonomous weapons, human oversight of critical decisions, and urgent "shared standards, independent oversight and clear mechanisms of accountability." His first encyclical, published in **May**, called for AI to serve human dignity.
- **Runware Plans Factory to Mass-Produce AI Data Center Pods:** AI infrastructure startup Runware plans to scale its Romania factory to **30 MW** of data center capacity per day by **2028** (~**1 GW** per month). It aims to bring Sonic Inference Pods online within **48 hours**. The company has raised **\$50 million** in Series A funding and claims **\$1 billion** in committed interest (**20+ MW**). Its site pipeline covers **397 MW**, expandable to **1.2 GW**, using renewable energy and closed-loop liquid cooling without water connections.
- **Zest Launches AI Restaurant Concierge via Text:** Restaurant discovery app Zest introduced an AI-powered "restaurant concierge" that books reservations directly through text messages at (212) 470-6067, similar to agents like Instinct and Poke. Founded in November 2024 with **\$1.8 million** in pre-seed funding from Alexis Ohanian (776) and Steve Jang (Kindred Ventures), Zest uses Plaid to track credit card dining data for personalization. It books via OpenTable,

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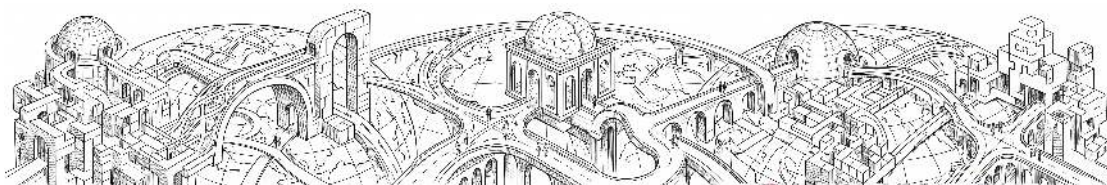
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Resy, and SevenRooms, supports group chats with in-thread voting, and plans food ordering as its first revenue lines.

- **Startups Use AI to Reclaim Airline Fare Drops:** US startups **JetBack**, **Junova**, and **Refare** use AI to monitor fares post-booking and secure refunds when prices drop. Junova found **22%** of **10,000** monitored flights saw at least one fare drop. JetBack charges **\$100/year**, while Junova and Refare take **20%** and **25%** of savings. Airlines collected **\$2.84 billion** in change fees in 2019, but fee eliminations post-COVID enabled this model, now threatened by **Alaska Airlines'** new rebooking restrictions.
- **Theranos Whistleblower Tyler Shultz Warns on AI Boom:** Tyler Shultz cautions that the AI boom, with unprofitable startups raising capital at **trillion-dollar valuations**, is “a great opportunity to go deceive people,” echoing the Theranos fraud that peaked at a **\$10 billion** valuation despite non-functional technology. Holmes, now serving over **11 years** in federal prison, has reportedly raised about **\$20 million** for diagnostics startup Haemantus, dubbed “Theranos 2.0.” Shultz warns AI’s complexity makes investor due diligence difficult, distinguishing genuine innovation from a “ChatGPT wrapper.”
- **Humanist Secures Religious Exemption From AI Use:** David Durman, a University of Kentucky administrator, became the first humanist to win a workplace religious exemption from using AI, facilitated by the American Humanist Association. Inspired by software engineer Erin Maus, a Unitarian Universalist who secured similar protections, Durman argues AI undermines moral agency and human creativity. The university confirmed accommodations will be reviewed as

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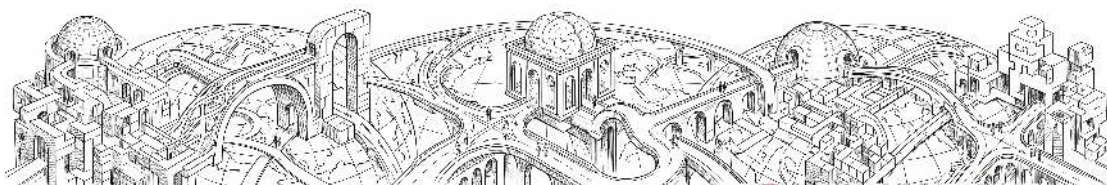
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responsibilities evolve. AHA attorneys stress that nontheists, like Catholics, are legally protected in such requests.

- **TechCrunch Founder Summit 2026 Opens in Boston:** TechCrunch Founder Summit 2026 takes place **November 4** at SoWa Power Station in Boston, featuring Braindate-powered networking for 1:1 and small-group founder meetings. Speakers include **Kent Bennett** (Bessemer Venture Partners) on product-market fit, **Dave Balter** (True Ventures) on pitching, and Toast co-founder **Steve Fredette** on scaling. The agenda spans Build and Impact stages, roundtables, live pitch sessions, and an Expo Hall. Attendees can save up to **\$100** on passes, with a free second ticket offered per purchase.

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