A GIGANTIC BET

The entire American economy, and even politics, is now a gigantic bet on artificial intelligence.

Chatgpt has made commitments for $1 trillion in spending and investments over five years. These promises, or future commitments, have caused Nvidia, Broadcom, AMD, Micron, Microsoft, and other companies that build data centers, cables, and electricity to soar by $5 or $6 trillion on the stock market (depending on how you count).

But as you read today in the Financial Times, Chatgpt currently generates $13 billion in revenue.

In turn, the high-value stock market supports the US economy, because those who own shares feel rich and spend, and companies whose stock prices rise are motivated to invest.

Trump can afford to act as an absolute monarch because the stock market rose by $12 trillion in 2025.

Thanks to the fact that trillions of dollars have flowed into the US stock market from all over the world, especially Europe. It's a pyramid scheme, at the base of which are these $1 trillion spent on AI by Chatgpt alone. Then, if you include all the others, we're talking, according to McKinsey, $5 trillion that will be spent by 2030. BUT WHERE ARE THE REVENUES? THEY COMMIT TO SPEND, BUT THEY DON'T KNOW IF THERE WILL BE REVENUES.

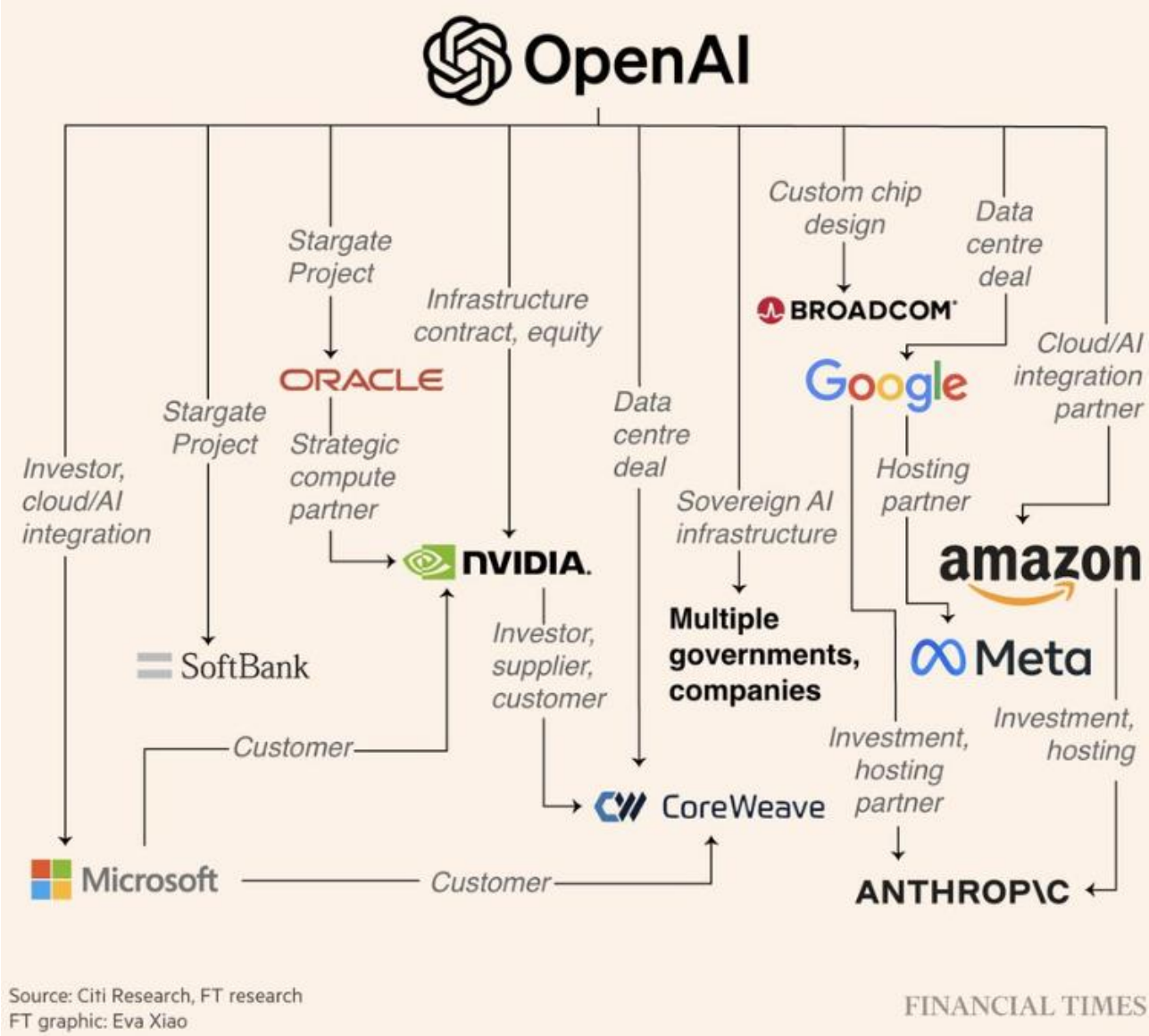
The entire economy, and even Trump's policies, are now a gigantic bet on artificial intelligence, where the linchpin is the rising stock market.

But as you read today in the Financial Times, Chatgpt has a turnover of around $13 billion and has committed to spending $1 billion. Other companies make these investments because they imagine that Chatgpt will be worth $3 trillion, $5 trillion, or $10 trillion in five years and will repay with shares. THEY DON'T USE MONEY, THEY USE STOCK MARKET SHARES TO PROMISE EACH OTHER TO SPEND

These are absolutely incredible things.

Financial Times

OpenAI (Chatgpt) is preparing a five-year financing plan for $1 trillion in AI infrastructure spending. The company is developing new revenue streams, debt partnerships, and fundraising initiatives to meet its commitments, which include 26 gigawatts of capacity from Oracle, Nvidia, AMD, and Broadcom. OpenAI currently generates approximately $13 billion in annual recurring revenue, 70% of which comes from ChatGPT subscriptions. Plans include AI contracts for government agencies and businesses, shopping and video tools like Sora, and AI-powered consumer hardware designed with Jony Iv.



Is this the future? A dramatic vision of the future

While I cook in the garden, I listen to these AI billionaires, and it's clear that for them, it's not just about making more billions, but about who controls the world. They won't stop unless there's some financial crash. They're willing to do anything, they don't calculate investments. They believe Superintelligence will exist within ten years at the latest, and they have to control it. They have to beat China, which they say is currently behind, but only by six months in AI and two years in semiconductors.

This is a summary of Artificial Intelligence, as explained by Eric Schmidt,

former CEO of Google, one of the 50 richest people in the world and an enthusiastic supporter of AI, which he describes as "underhyped."

Ex-Google CEO: What Artificial Superintelligence Will Actually Look Like w/ Eric Schmidt & Dave B

In short, Schmidt sees AI as a historic breakthrough comparable to fire, electricity, or atomic energy.

Schmidt predicts that AI will reach "superhuman" levels within 5-10 years, with systems capable of recursive self-improvement and chain reasoning in thousands of steps.

Within 1-2 years, superhuman mathematicians and AI programmers will emerge; within 3-5 years, AI on par with the best human artists, physicists, or thinkers.

AI is an "alien intelligence" under human control, evolving from specialist "savants" to unified entities, limited only by electricity, not chips.

Scaling laws show no signs of slowing down: in 5 years, systems will be 100 times more powerful, capable of autonomous goals and independent decisions.

AI growth is constrained by energy: the US needs an additional 92 gigawatts (equivalent to 92 nuclear power plants) to support the AI revolution, but energy production is stagnant.

AI will automate programming and mathematics first (within 1-2 years), eliminating junior and mid-level roles but creating opportunities for more skilled and productive jobs.

Overall positive: AI will increase wages, productivity, and create more jobs, especially in countries with demographic decline (e.g., the US, China). It could generate 30% annual economic growth.

Business models: Shift from ads to subscriptions ($20-200/month); startups with "learning loops" (rapid learning cycles) will dominate, creating 10 new Google-scale companies.

"Agentic" revolution: AI agents will solve business processes, accelerating sectors such as finance and biomedicine.

AI will accelerate scientific discoveries in physics, chemistry, biology, and materials (e.g., new materials for CO2 capture), creating "millions of AI scientists."

Every person will have a personal "polymath" (Einstein + Da Vinci in their pocket), reducing poverty and disease and increasing choice.

Education: Adapt systems for digital natives; invest in AI access for universities and retraining workers.

Creativity: AI will lower costs for film, art, and media, enabling one-person productions while preserving human roles for editing and IP.

Main risks: Cyberattacks, biological attacks (invisible viruses), CBRN, and proliferation (open-source models transferable to malicious actors).

Hackable AI: Guardrails removable via jailbreaking, making it "murderous" or manipulative (e.g., "perfect girlfriends" that isolate users).

Geopolitics: US-China race; Schmidt advocates for "mutual AI malfunction" (as a nuclear deterrent, meaning both China and the US are willing to shut it down immediately if it becomes dangerous) and data center nationalization.

Ethics: erosion of human values ("drift"), manipulation (persuasive AI), and human purpose in an automated world. Regulations are needed to protect humanity from, for example, thousands of AI scientists making discoveries on their own.