

## 01 BJT

- 时间窗口: 2026-05-10 09:01–21:01 BJT (UTC 2026-05-10 01:01–13:01)
- 数据限制说明: 未使用 Tavily; x-cli/X API 未安装且五项 X API 环境变量缺失。Hermes 内置 web\_search 尝试返回 provider 432 后停止, 未调用任何 Tavily 专用流程; 本次采用公开网页、Google/Bing News RSS、官方 RSS、Nitter/X 公开 RSS、媒体 X snippet 回退。互动指标均标为 N/A。
- 排名口径: X 指标不可得时以来源权威性、跨源复现、时效性、战略影响推断热度; 不编造浏览量/点赞/转发。

## Executive Summary

- 本轮 AI 主线不是“又一个模型发布”, 而是训练网络、内存/HBM、TPU/电网应用、面试/劳动制度等基础设施与制度层面的扩散。
- Alphabet 与 Nvidia/内存链的新闻共同说明: 市场正在给“完整 AI stack + 供给瓶颈”更高估值, 纯软件应用的相对溢价受到挑战。
- OpenAI 相关信号分裂为两条: 一条是大集群网络工程与 Codex 企业化, 另一条是 FT 关注的估值/治理/竞争对手关系。
- 金融端最大变量仍是 Iran/Hormuz/Aramco: 即便和平谈判推进, 油市恢复时间和缺口库存意味着能源通胀风险不会马上归零。
- SEC 与 prediction markets ETF、Digital Asset Holdings 融资、BTC 买盘叙事显示 crypto/链上金融正从零售 beta 走向监管与机构基础设施。
- 下周 CPI、零售销售、Fed speakers 与 AI earnings 叠加, 市场会同时测试“降息预期”和“AI 盈利兑现”。
- 本次互动指标全部 N/A: 没有官方 X API, 公开 RSS/Nitter 只提供文本和时间; 热度排序为推断热度。

## AI Top 10 (推断热度; 互动指标 N/A)

## AI Top 1. OpenAI: Supercomputer networking to accelerate large scale AI training

- 来源/账号: OpenAI / Google News RSS

- 链接: <https://news.google.com/rss/articles/CBMiZEFVX3lxTE44UjNuSVJqV1FLVFlvR2VfWjZhZmtNMDZjWkREZGpsOEx2UWN6c0JqZGZzZ1JyeV85aVB1Yk56OUhlUTV5bE1sZmVsUk9EaHJEcF9JakVLczQyd0dOMDVTcVdhcTg?oc=5>

- 时间: 2026-05-10 19:00 BJT

- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)

- 核心内容: 官方页面可见于 RSS/搜索, 但直接抓取被 403/JS 挡住; 以 RSS 可追溯源记录。

- 为什么重要/潜在影响: 训练网络成为下一轮 frontier scaling 的硬瓶颈, 能否降低大集群通信损耗直接影响模型边际成本。

- 置信度/不确定性: 中高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## AI Top 2. Alphabet 过去一年上涨约160%, 市场重新定价其 ‘拥有大部分 AI stack’ 的价值

- 来源/账号: CNBC / @CNBCtech

- 链接: <https://www.cnbc.com/2026/05/10/alphabet-160percent-rally-in-year-reflects-value-of-owning-most-of-ai-stack.html>

- 时间: 2026-05-10 20:00 BJT

- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)

- 核心内容: CNBCtech 同步发帖, 叙事从单一模型竞争转向全栈分发、TPU、Search/Cloud/Android 入口。

- 为什么重要/潜在影响: 全栈 AI 资产 (模型、芯片、云、入口) 获得估值溢价, 单点应用公司相对承压。

- 置信度/不确定性: 高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## AI Top 3. OpenAI trial lays bare rivalries behind start-up' s \$852bn rise

- 来源/账号: Financial Times / @fttechnews

- 链接: <https://x.com/fttechnews/status/2053357957006479784>

- 时间: 2026-05-10 14:14 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: FT 把 OpenAI 估值、对手关系和治理/交易结构放到同一张桌面, 影响 AI 私募估值风险溢价。
- 为什么重要/潜在影响: OpenAI 的治理、诉讼和估值被公开化, 可能改变大型 AI 私募融资条款和战略联盟。
- 置信度/不确定性: 中高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

#### AI Top 4. Memory chip makers are looking at a supercycle; stocks jumped 30% in one week

- 来源/账号: CNBC / @CNBC
- 链接: <https://www.cnbc.com/2026/05/10/memory-chip-makers-are-looking-at-a-supercycle-and-win-dfall-gains-the-stocks-jumped-30percent-in-one-week.html>
- 时间: 2026-05-10 19:24 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: AI server 内存、HBM/DRAM 供需仍是训练/推理成本曲线的关键变量。
- 为什么重要/潜在影响: HBM/DRAM 价格周期会继续传导到 GPU 集群成本、AI 云毛利和服务器交付节奏。
- 置信度/不确定性: 高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

#### AI Top 5. Google Cloud: AXIA Energia 用 TPU/weather modeling 降低断电风险

- 来源/账号: Google Cloud / @googlecloud
- 链接: <https://x.com/googlecloud/status/2053460045115892193>
- 时间: 2026-05-10 21:00 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: AI 从聊天/代码进入电网运营: 天气建模 + TPU 集群对基础设施可靠性有直接经济意义。
- 为什么重要/潜在影响: TPU/天气模型用于电网, 说明 AI infra 正向能源系统反哺, 而非只消

耗电力。

- 置信度/不确定性：中；公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

### AI Top 6. Google to allow AI use in engineering interviews, signalling hiring shift

- 来源/账号：Storyboard18 / Google News RSS

- 链接：<https://news.google.com/rss/articles/CBMiwgFBVV95cUxOSjhMVXNUdzRxaIgx3BNcS1WU2dZdXBPTzk3MXJHVXdyU05Wem5tcGw0d3pVUXdVRLZ5SlVYc2piYUd4LWJ6RFRzSUFDD3E2X3VDUzRoeWxYMXJDR2hHa2FJQlY5TFJpMUw0Q3ZVQ1RzaEhDV2hqQ1pTVzE5ZGxodWd3U0lzQXdXSfHTRmN2TmsyaEhLLUNfSGJJb?oc=5>

- 时间：2026-05-10 13:51 BJT

- 互动指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发)

- 核心内容：如果面试允许 AI，企业会更快从考察“记忆编码”转向考察系统设计、审查和工具协作。

- 为什么重要/潜在影响：AI 使用变成工程面试默认工具后，招聘评估和大学 CS 教学都会被迫重构。

- 置信度/不确定性：中；公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

### AI Top 7. Google I/O 2026 expected: Gemini, Android XR glasses and more

- 来源/账号：CNET / Google News RSS

- 链接：<https://www.cnet.com/tech/services-and-software/google-io-2026-everything-to-know/>

- 时间：2026-05-10 15:11 BJT

- 互动指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发)

- 核心内容：I/O 进入倒计时，Gemini + XR 可能成为端侧/多模态入口竞争的新窗口。

- 为什么重要/潜在影响：Gemini + XR 若在 I/O 兑现，端侧多模态入口可能重新分配移动生态的 AI 流量。

- 置信度/不确定性：中高；公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

### AI Top 8. Voice AI in India is hard; Wispr Flow is betting on it anyway

- 来源/账号: TechCrunch / @TechCrunch
- 链接: <https://techcrunch.com/2026/05/09/voice-ai-in-india-is-hard-wispr-flow-is-betting-on-it-anyway/>
- 时间: 2026-05-10 10:03 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: 印度语音 AI 代表低资源语言、口音和移动端输入场景; 如果突破, TAM 不只在英语办公。
- 为什么重要/潜在影响: 非英语语音 AI 是全球化增量市场, 技术难点也会形成护城河。
- 置信度/不确定性: 中高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

#### AI Top 9. Women at the sharp end as AI takes over administrative roles

- 来源/账号: Financial Times / @fttechnews
- 链接: <https://x.com/fttechnews/status/2053330818915844311>
- 时间: 2026-05-10 12:26 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: 行政/文员自动化进入劳动力分布问题; 对 AI productivity 的边际收益与政治阻力都更清晰。
- 为什么重要/潜在影响: AI 对行政岗位的替代压力从抽象预测变成具体劳动力分配风险。
- 置信度/不确定性: 中; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

#### AI Top 10. Chip stocks are soaring while software slows; is a reversal looming?

- 来源/账号: MSN / 24/7 Wall St. / Bing+Google News RSS
- 链接: <https://www.msn.com/en-us/money/markets/chip-stocks-are-soaring-while-software-slows-is-a-reversal-looming/ar-AA22Pt6L>
- 时间: 2026-05-10 12:58/19:30 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: AI 交易从软件估值扩张转向芯片/组件盈利兑现; 若反转, 市场会重新检验“算力先行”的持续性。

- 为什么重要/潜在影响：芯片强、软件弱的分化提示 AI 交易进入“谁捕获利润”而不只是“谁讲故事”的阶段。
- 置信度/不确定性：中；公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## 金融 Top 10（推断热度；互动指标 N/A）

金融 Top 1. Iran has submitted response to latest US proposal to end 10 weeks of war

- 来源/账号：Bloomberg / @business; Javier Blas; FinancialJuice
- 链接：<https://x.com/business/status/2053455753852112986>
- 时间：2026-05-10 20:42 BJT
- 互动指标：N/A（X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发）
- 核心内容：同一信号被 Bloomberg、Javier Blas、FinancialJuice、FirstSquawk 多账号转述；细节仍等待官方文件。
- 为什么重要/潜在影响：战争结束谈判进入关键节点，油价、航运保险和中东风险资产会对细节高度敏感。
- 置信度/不确定性：中高；公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

金融 Top 2. Aramco CEO warns 1 billion barrels lost will slow oil market recovery

- 来源/账号：Reuters / @Reuters
- 链接：<https://www.reuters.com/business/energy/aramco-ceo-warns-1-billion-barrels-lost-will-slow-oil-market-recovery-2026-05-10/>
- 时间：2026-05-10 20:05 BJT
- 互动指标：N/A（X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发）
- 核心内容：即便 Hormuz 重新开放，库存与物流恢复不是瞬时；油价风险溢价可能粘性更强。
- 为什么重要/潜在影响：油市恢复慢意味着能源通胀不会因一条和平 headline 立刻消失。
- 置信度/不确定性：高；公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

金融 Top 3. Aramco Q1 profit jumps ~25–26% as Hormuz risks push pipeline to full capacity

- 来源/账号: Reuters/Bloomberg/CNBC

- 链接: <https://www.reuters.com/business/energy/saudi-aramcos-q1-profit-rises-25-higher-sales-2026-05-10/>

- 时间: 2026-05-10 13:22–16:27 BJT

- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)

- 核心内容: 战时油价抬升和管道满负荷把能源地缘风险转化为公司利润与进口国通胀压力。

- 为什么重要/潜在影响: 能源公司盈利改善与消费国通胀压力并存, 形成典型地缘供给冲击。

- 置信度/不确定性: 高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

金融 Top 4. SEC delay on prediction markets ETFs echoes long-fought bitcoin ETF battle

- 来源/账号: CNBC / @CNBC

- 链接: <https://www.cnbc.com/2026/05/10/sec-prediction-markets-etfs-trading-launch-delay.html>

- 时间: 2026-05-10 20:29 BJT

- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)

- 核心内容: 预测市场从应用走向 ETF 化, 监管路径可能复制 Bitcoin ETF 的漫长博弈。

- 为什么重要/潜在影响: 预测市场 ETF 若获批会把事件交易嵌入传统账户, 监管节奏本身就是市场变量。

- 置信度/不确定性: 高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

金融 Top 5. Digital Asset Holdings raising at around \$2B valuation with a16z crypto among investors

- 来源/账号: Bloomberg / @business

- 链接: <https://x.com/business/status/2053445334865432630>

- 时间: 2026-05-10 20:01 BJT

- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: 机构链上结算继续获得资本支持, 银行/交易所后端 tokenization 不是单纯零售 crypto 叙事。
- 为什么重要/潜在影响: 机构级 tokenization 融资说明区块链交易后端仍有真实金融基础设施需求。
- 置信度/不确定性: 中; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## 金融 Top 6. Memory chip makers look at 'supercycle' and windfall gains; stocks jumped 30% in one week

- 来源/账号: CNBC / @CNBC
- 链接: <https://www.cnbc.com/2026/05/10/memory-chip-makers-are-looking-at-a-supercycle-and-windfall-gains-the-stocks-jumped-30percent-in-one-week.html>
- 时间: 2026-05-10 19:27 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: 半导体供给紧张会同时推高 AI capex、亚洲出口收入和通胀/利率敏感资产波动。
- 为什么重要/潜在影响: 内存 supercycle 把 AI 需求传导至股票、通胀和亚洲供应链。
- 置信度/不确定性: 高; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## 金融 Top 7. FT poll: tariffs and Iran war are hurting US midterm prospects

- 来源/账号: Financial Times / @FT
- 链接: <https://x.com/FT/status/2053422334795465083>
- 时间: 2026-05-10 18:30 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: 关税与战争成本进入选民感受, 政策不确定性可能在中期选举前反馈到市场风险溢价。
- 为什么重要/潜在影响: 关税与战争的政治成本上升, 会增加贸易政策摇摆和财政/能源补贴压力。
- 置信度/不确定性: 中; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## 金融 Top 8. The Week Ahead: CPI, Retail Sales, Fed Speakers and AI Earnings Test Record Stock Rally

- 来源/账号: FXEmpire / Bing News RSS
- 链接: <https://www.fxempire.com/forecasts/article/the-week-ahead-cpi-retail-sales-fed-speakers-and-ai-earnings-test-record-stock-rally-1596894>
- 时间: 2026-05-10 11:59 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: 下周宏观数据与 AI earnings 同时检验高估值; 利率路径和 AI 盈利兑现会共同驱动指数。
- 为什么重要/潜在影响: 宏观数据与 AI 财报同周, 指数风险来自利率与盈利预期的双重校准。
- 置信度/不确定性: 中; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## 金融 Top 9. Private credit trouble may be costly for sector investors but manageable for broader financial system

- 来源/账号: WSJ Markets / @WSJmarkets
- 链接: <https://x.com/WSJmarkets/status/2053309352593740005>
- 时间: 2026-05-10 11:01 BJT
- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: 私募信贷是信用周期噪声源; 若损失仍局限, 系统性冲击暂时低于市场恐慌叙事。
- 为什么重要/潜在影响: 私募信贷暂未成系统性风险, 但需跟踪违约/估值标记是否扩散。
- 置信度/不确定性: 中; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## 金融 Top 10. Michael Saylor hints Strategy is “back to work” buying more bitcoin; crypto social/risk appetite remains hot

- 来源/账号: Bitcoin Magazine / Cointelegraph / @WatcherGuru
- 链接: <https://x.com/BitcoinMagazine/status/2053437354883354885>
- 时间: 2026-05-10 19:29 BJT

- 互动指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发)
- 核心内容: BTC 资金流和上市公司资产负债表策略继续影响 crypto beta; 但社交过热本身也是反向风险信号。
- 为什么重要/潜在影响: BTC 买盘叙事延续风险偏好, 但过热社交情绪提示回撤可能。
- 置信度/不确定性: 中; 公开网页/RSS 回退可能缺少全文、互动数据和后续更正。

## 深度分析: AI 技术/产品

- **训练基础设施**: OpenAI supercomputer networking 与 NVIDIA Spectrum-X/MRC 背景共同指向一个事实: 模型规模继续上行时, 网络 fabric、拥塞控制、容错和数据移动会比单卡 FLOPS 更决定边际效率。
- **产品入口**: Alphabet 的 “most of the stack” 叙事、Google I/O/Gemini/XR 预期和 Google Cloud TPU 电网案例, 把 AI 从 chatbot 产品线扩展到搜索、云、终端、能源和企业运维。
- **Agent/劳动制度**: OpenAI Codex 安全运行、AI 面试许可、行政岗位替代与 voice AI 的本地化挑战, 说明 agent 时代的真实摩擦是安全、制度和用户场景, 而不仅是模型 benchmark。

## 深度分析: AI 商业/资本/基础设施

- **资本市场偏好**: Nvidia/内存/芯片链继续吸引资金, 软件应用相对放缓; 市场在问谁能把 AI capex 转化成现金流。
- **OpenAI 估值与治理**: FT 关注 OpenAI \$852bn rise 背后的竞争和诉讼, 提醒投资者 frontier lab 估值包含治理/监管/联盟结构风险。
- **电力与能源**: Google Cloud TPU/weather modeling 说明 AI 能帮助能源系统降低损失, 但 AI 数据中心本身也受电价与电网约束。

## 深度分析: 金融/宏观/市场

- **能源是主线**: Iran response、Hormuz tanker/LNG crossing、Aramco 利润与 CEO

关于 1B barrels 的警告共同说明：和平预期可以压低风险溢价，但实物市场恢复需要时间。

- **\*\*利率与盈利双测试\*\***：下周 CPI/retail sales/Fed speakers 与 AI earnings 同周出现，市场会同时重新定价降息路径和 AI 盈利兑现。

- **\*\*信用与链上金融\*\***：WSJ private credit、Digital Asset 融资、SEC prediction market E TF 与 BTC 买盘共同构成“传统信用风险 + 新金融基础设施”的双线观察。

## 深度分析：贸易/政策/地缘政治

- **\*\*关税政治化\*\***：FT poll 把 tariffs 与 Iran war 放入 midterm pressure 框架，说明贸易政策不确定性会持续进入选举周期。

- **\*\*芯片供应链\*\***：内存 supercycle 与 AI capex 将亚洲半导体供应链、能源价格和美国科技股估值连接起来。

- **\*\*Hormuz 与全球贸易\*\***：航运路线恢复、保险费和能源库存将继续影响制造业成本、运输价格和央行通胀判断。

## 认知增量 / Knowledge Cards

AI 训练网络比 GPU 数量更像“下一瓶颈”

当集群扩到数十万 GPU/ASIC, all-reduce、参数同步、checkpoint 和故障恢复会吞掉大量有效算力。MRC/Spectrum-X/自研 fabric 的价值在于把昂贵芯片从等待通信中释放出来。

GPU/HBM/DRAM 的利润池如何传导到 AI 云价格

AI 服务器不是只有 GPU：HBM、DRAM、网络交换机、光模块、电力与液冷都可能成为约束。内存 supercycle 会通过交付周期和折旧成本进入模型推理价格。

油价冲击为什么会影响 AI 估值

数据中心电力成本、利率贴现率、消费需求与企业 IT budget 都会被能源通胀影响；AI 长久期成长股对油价-利率链条敏感。

## Prediction market ETF 的二阶影响

ETF 化会把事件概率交易带入退休/券商账户，但也会把“赌博/操纵/信息优势”问题推给 SEC；路径可能类似 Bitcoin ETF：先拖延、再结构性妥协。

## Stablecoin/T-bill demand 与链上结算

稳定币储备通常配置短债，规模增长会影响 T-bill 边际需求；Digital Asset 这类后端结算公司则把 tokenization 叙事落到银行/交易所清结算。

## Risks and Noise

- X API 不可用，公开 RSS/Nitter/X snippet 无法取得浏览量、点赞、转发、quote、回复；所有互动指标为 N/A。
- web\_search 内置工具返回 provider 432 后停止使用，RSS fallback 可能遗漏私密/登录后内容；未使用 Tavily 专用流程。
- Google News RSS wrapper 有时不能反解 canonical URL；报告优先保留可追溯 wrapper，官方站 403/JS 阻挡时标注不确定。
- 周末新闻里体育、娱乐、广告/SEO、低质 crypto 推广很多，已尽量过滤；全量池仍可能含 snippet-only 项。
- Iran/Hormuz/war negotiation 信息变化快，需等待官方声明、Reuters/Bloomberg 后续确认。

## 未来12-24小时观察清单

- OpenAI / OpenAIDevs / sama / gdb: Supercomputer networking、Codex 价格/限额、企业安全采用细节是否有官方补充。
- Google / GoogleCloud / DeepMind / CNBCtech: Google I/O 前 Gemini、XR、TPU、Cloud AI stack 的预热节奏。

- NVIDIA / NVIDIAAI / CNBC / memory 半导体链：HBM、DRAM、Spectrum-X/MRC、数据中心网络与内存价格信号。
- Reuters / Bloomberg / Javier Blas / Giovanni Staunovo：Iran response、Hormuz 航运、Aramco、LNG/tanker crossing 高频更新。
- 宏观：美国 CPI、零售销售、Fed speakers、Treasury yields、美元、油价期限结构。
- Crypto：SEC prediction market ETF、CLARITY/market structure hearing、BTC ETF/Strategy 买盘、stablecoin/T-bill demand。

## AI 全量资讯池

1. **\*\*OpenAI: Supercomputer networking to accelerate large scale AI training\*\*** — OpenAI / Google News RSS | 2026-05-10 19:00 BJT | 官方/Google News RSS | 指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度：中高

链接：<https://news.google.com/rss/articles/CBMiZEFVX3lxTE44UjNuSVJqV1FLVFlvR2VfWjZhZmtNMDZjWkREZGpsOEx2UWN6c0JqZGZzZ1JyeV85aVB1Yk56OUhlUTV5bE1sZmVsUk9EaHJEcF9JakVLczQyd0dOMDVTcVdhcTg?oc=5>

摘要/说明：官方页面可见于 RSS/搜索，但直接抓取被 403/JS 挡住；以 RSS 可追溯源记录。

2. **\*\*Alphabet 过去一年上涨约160%，市场重新定价其‘拥有大部分 AI stack’的价值\*\*** — CNBC / @CNBCtech | 2026-05-10 20:00 BJT | 媒体 + X snippet | 指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度：高

链接：<https://www.cnbc.com/2026/05/10/alphabet-160percent-rally-in-year-reflects-value-of-owning-most-of-ai-stack.html>

摘要/说明：CNBCtech 同步发帖，叙事从单一模型竞争转向全栈分发、TPU、Search/Cloud/Android 入口。

3. **\*\*OpenAI trial lays bare rivalries behind start-up’s \$852bn rise\*\*** — Financial Times / @fttechnews | 2026-05-10 14:14 BJT | X snippet | 指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度：中高

链接：<https://x.com/fttechnews/status/2053357957006479784>

摘要/说明：FT 把 OpenAI 估值、对手关系和治理/交易结构放到同一张桌面，影响 AI 私募估值风险溢价。

4. **\*\*Memory chip makers are looking at a supercycle; stocks jumped 30% in one week\*\*** — CNBC / @CNBC | 2026-05-10 19:24 BJT | 媒体 + X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 高

链接: <https://www.cnbc.com/2026/05/10/memory-chip-makers-are-looking-at-a-supercycle-and-wind-fall-gains-the-stocks-jumped-30percent-in-one-week.html>

摘要/说明: AI server 内存、HBM/DRAM 供需仍是训练/推理成本曲线的关键变量。

5. **\*\*Google Cloud: AXIA Energia 用 TPU/weather modeling 降低断电风险\*\*** — Google Cloud / @googlecloud | 2026-05-10 21:00 BJT | X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中

链接: <https://x.com/googlecloud/status/2053460045115892193>

摘要/说明: AI 从聊天/代码进入电网运营: 天气建模 + TPU 集群对基础设施可靠性有直接经济意义。

6. **\*\*Google to allow AI use in engineering interviews, signalling hiring shift\*\*** — Storyboard18 / Google News RSS | 2026-05-10 13:51 BJT | RSS/snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiwgFBVV95cUxOSjhMVXNUdzRxaIgb3BNcS1WU2dZdXBPTzk3MXJHVXdyU05Wem5tcGw0d3pVUXdVRIz5SIVYc2piYUd4LWJ6RFRzSUFDD3E2X3VDUzRoeWxYMXJDR2hHa2FJQlY5TFJpMUw0Q3ZVQ1RzaEhDV2hqQ1pTVzE5ZGxodWd3U0lzQXdXSfHTRmN2TmsyaEhLLUNfSGJJb?oc=5>

摘要/说明: 如果面试允许 AI, 企业会更快从考察“记忆编码”转向考察系统设计、审查和工具协作。

7. **\*\*Google I/O 2026 expected: Gemini, Android XR glasses and more\*\*** — CNET / Google News RSS | 2026-05-10 15:11 BJT | 媒体/RSS | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://www.cnet.com/tech/services-and-software/google-io-2026-everything-to-know/>

摘要/说明: I/O 进入倒计时, Gemini + XR 可能成为端侧/多模态入口竞争的新窗口。

8. **\*\*Voice AI in India is hard; Wispr Flow is betting on it anyway\*\*** — TechCrunch / @TechCrunch | 2026-05-10 10:03 BJT | 媒体 + X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://techcrunch.com/2026/05/09/voice-ai-in-india-is-hard-wispr-flow-is-betti>

ng-on-it-anyway/

摘要/说明：印度语音 AI 代表低资源语言、口音和移动端输入场景；如果突破，TAM 不只在英语办公。

9. **\*\*Women at the sharp end as AI takes over administrative roles\*\*** — Financial Times / @fttechnews | 2026-05-10 12:26 BJT | X snippet | 指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度：中

链接：<https://x.com/fttechnews/status/2053330818915844311>

摘要/说明：行政/文员自动化进入劳动力分布问题；对 AI productivity 的边际收益与政治阻力都更清晰。

10. **\*\*Chip stocks are soaring while software slows; is a reversal looming?\*\*\*** — MSN / 24/7 Wall St. / Bing+Google News RSS | 2026-05-10 12:58/19:30 BJT | RSS/snippet | 指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度：中

链接：<https://www.msn.com/en-us/money/markets/chip-stocks-are-soaring-while-software-slows-is-a-reversal-looming/ar-AA22Pt6L>

摘要/说明：AI 交易从软件估值扩张转向芯片/组件盈利兑现；若反转，市场会重新检验“算力先行”的持续性。

11. **\*\*The Pentagon just signed AI deals with OpenAI, Google, Microsoft, and Nvidia - and cut Anthropic out entirely\*\*** — bing | 2026-05-02 22:49 BJT | news\_rss | 指标：N/A | 置信度：中高

链接：<https://www.techspot.com/news/112269-pentagon-signed-ai-deals-openai-google-microsoft-nvidia.html>

摘要/说明：Defense officials have framed the effort as a necessary step to keep pace with both technological change and geopolitical competition. "We are equipping the warfighter with ...

12. **\*\*RT by @ClementDelangue: It was a manufactured marketing narrative all along because Anthropic lacked compute. "Cybersecurity experts and artificial intelligence researchers told CNBC that the software vulnerabilities revealed by Mythos can be found using existing models, including those from Anthropic and OpenAI." "We ran older models against the same code base to see if we'd be able to detect the same vulnerabilities," Kloc said. "We did, with both OpenAI and Anthropic's older models." https://www.cnbc.com/2026/05/08/anthropic-mythos-ai-cybersecurity-banks.html\*\*** — Clement Delangue | 2026-05-08 21:09 BJT | x\_post | 指标：N/A (X API 不可用；公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度：中高

链接：<https://x.com/firstadopter/status/2052737621156130853>

摘要/说明: It was a manufactured marketing narrative all along because Anthropic lacked compute. " Cybersecurity experts and artificial intelligence researchers told CNBC that the software vulnerabilities revealed by Mythos can be found using existing models, including th

13. **"Most Important Stock of the Year" — Goldman Sachs Just Said That About Nvidia, and Wall Street Is Listening - primaryignition.com** — primaryignition.com | 2026-05-10 19:02 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMi2wFBVV95cUxQaWtLSzg3c00zUy1QbHZqYXVFa1JzTnl6anlabVBkWHl2a1VENHFQQ1hDeWJfaV9YMVftVUZteXhSdXVmRzZqWUImeUJjS1pft2JGeklzNE1fZXE0NTZyTy04QVpuR09RTWV2N3hIbGE2UU1BQmxfRDFvLWFqVTVZa3dqG9xMnU5NTV6Mk5UMVF5dUJLbnJkc2tkS3NEazBxMHhHbkZicC10T3ZDUzJ0VTJ5SG55bUh1NFBPTUIzc3Myd1hVTnk4aGVkLVExTzRZLS0xZk82VGgwUjA?oc=5>

摘要/说明: "Most Important Stock of the Year" — Goldman Sachs Just Said That About Nvidia, and Wall Street Is Listening primaryignition.com

14. **"OpenAI's New GPT-5.5 Powers Codex on NVIDIA Infrastructure — and NVIDIA Is Already Putting It to Work"** — NVIDIA blog | 2026-04-24 02:57 BJT | official\_rss | 指标: N/A | 置信度: 中高

链接: <https://blogs.nvidia.com/blog/openai-codex-gpt-5-5-ai-agents/>

摘要/说明: AI agents have revolutionized developer workflows, and their next frontier is knowledge work: processing information, solving complex problems, coming up with new ideas and driving innovation. Codex, OpenAI's agentic coding application, is enabling this new fr

15. **"Nvidia Stock Week Ahead: NVDA Nears Record as AI Deals and Inflation Data Test the Rally - TechStock<sup>2</sup>"** — TechStock<sup>2</sup> | 2026-05-10 20:23 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMirAFBVV95cUxNa1hMMUhieXNrbXBhTUg1THMxT1lPVHdnQUhCUDVJdE9SYlhJaVk5MHpaRWRNT2QyUEhJdHdWcnk1Xy12VmV3N29IazJ0dlIzMlBaMWR6WVpkc3hTWEJmRnpYRHR4RFRTZVVGZk1BeEZKcUIEQ1NNaG9sT1pNUUN0SHYtVERRT1MwOTV6dUZZLWVhbGVUQmVLNnNabVNGdkoyWUVWbnpxZGQwd0xJ?oc=5>

摘要/说明: Nvidia Stock Week Ahead: NVDA Nears Record as AI Deals and Inflation Data Test the Rally TechStock<sup>2</sup>

16. **"This Chip Stock Is Absolutely Skyrocketing. And No, I'm Not Talking About Intel or Nvidia. - AOL.com"** — AOL.com | 2026-05-10 17:19 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiiAFBVV95cUxPWkNMb1hKaFZMRlQ4TDM4MHJyRy1SV2VHZFB3ZHdnR2xRM05ReU5PQ0xZR096Wm5meUpvVTdLem1zYjJhaHpsbUlEeXlUQkh6TFp4MXFsMmozRm5DVEtxNm5mazNLQ0dGMUNVN2FFM0lvUUNSUkdZdjRfdDg4eUJ0STFBTVNcVZv?oc=5>

摘要/说明: This Chip Stock Is Absolutely Skyrocketing. And No, I'm Not Talking About Intel or Nvidia. AOL.com

17. **\*\*Commerce AI center will evaluate Google Deepmind, Microsoft and xAI models - Nextgov/FCW\***  
\* — Nextgov/FCW | 2026-05-06 05:37 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMi0wFBVV95cUxPMXlGSXk3V2JvQVBOY2RVOXJVdDh1X0RPV1VZMDNWaWpGaWp0TjZ6MTlPbmcwYWVxNDZxajlQOE9SbDZnaFAAtREJiSDA2UnlCUm0LTN1c1BWMLpjOURmSDVYd29BZk1sZ3BPb2t3SlZ4R1pTRzI0bWI3T2VDU2w2VVEyV3Nya2RRV0FheEo5OWNMa0l1bk40aXRDWE9ZTGtZi0tQ3lCRXotRFBDZThyNmpIaTFxMlVaSEhlR1VoQ2RGaGtmRnpWRTlGM19QbUZvWU84?oc=5>

摘要/说明: Commerce AI center will evaluate Google Deepmind, Microsoft and xAI models Nextgov/FCW

18. **\*\*NVIDIA and Google Cloud Collaborate to Advance Agentic and Physical AI\*\*** — NVIDIA blog | 2026-04-22 20:00 BJT | official\_rss | 指标: N/A | 置信度: 中高

链接: <https://blogs.nvidia.com/blog/google-cloud-agentic-physical-ai-factories/>

摘要/说明: NVIDIA and Google Cloud have collaborated for more than a decade, co-engineering a full-stack AI platform that spans every technology layer — from performance-optimized libraries and frameworks to enterprise-grade cloud services. This foundation enables develo

19. **\*\*RT by @ylecun: Yann LeCun closed \$1.03B for AMI Labs on March 10. Three days later, this paper dropped from his NYU collaborators. 15M parameters. Single GPU. A few hours of training. LeWorldModel is the first JEPA that trains end-to-end from raw pixels. Two loss terms: predict the next embedding, keep the latent space Gaussian. Previous JEPAs needed exponential moving averages or pretrained encoders to avoid representation collapse. LeWM doesn't. Six hyperparameters down to one. The numbers are the story. Foundation-model-based world models require hundreds of millions of parameters and serious compute to plan a control task. LeWM plans up to 48x faster while staying competitive on 2D and 3D benchmarks. The whole thing fits on a laptop GPU. Look at the trajectory. Yann announced his Meta departure in November 2025 after 12 years and called founding FAIR his "proudest non-technical accomplishment." On March 10, 2026, AMI Labs closed the largest seed round in European history at a \$3.5B pre-money valuation. Bezos, Nvidia, Samsung, and Toyota all wrote checks. Three days later: a paper showing that JEPA-from-pixels is no longer fragile and no longer compute-heavy. The engineering scaffolding that made it look like an academic curiosity is gone. The authors sit at Mila, NYU, Samsung SAIL, and Brown. None at Meta. Yann's bet was that the path to machine intelligence runs through world models, not language models. He left a public company to build it. Each JEP**

A paper from his network resets the assumed cost structure for that bet. This one makes world modeling laptop-cheap. Meta still has the GPUs. The architecture left.\*\* — yleacun | 2026-05-09 13:01 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/aakashgupta/status/2052977133073690820>

摘要/说明: Yann LeCun closed \$1.03B for AMI Labs on March 10. Three days later, this paper dropped from his NYU collaborators. 15M parameters. Single GPU. A few hours of training. LeWorldModel is the first JEPA that trains end-to-end from raw pixels. Two loss terms: pred

20. \*\*Should You Buy Nvidia Stock Before May 20? Here's What History Says. - The Motley Fool\*\* — The Motley Fool | 2026-05-10 20:51 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMimAFBVV95cUxNZ2E3R2RRaGlHTnJyX0NVVHZjaXVlMW1HQkQ0MjdUNjdpVlppTVd0VGNNeW1qYUhmVliWVVYcm1ocW01cG1QNDVNUG5GTGk2N2Rad2ZzcEh5aXVxNURWdk9GNlZJbmNEbmp6dmY2UHlfS19UR3ZVVHFnWmZZc1pPZTZCYUxYOHhqcHdCeVMYOWUtQ1dzLUdsZQ?oc=5>

摘要/说明: Should You Buy Nvidia Stock Before May 20? Here's What History Says. The Motley Fool

21. \*\*Most agentic stacks run into the same problems pretty quickly: reasoning and tool parsing drift across turns, KV cache reuse falls apart, or tools fire too late. We' ve been hardening Dynamo' s harness-facing path so @Claudeai Code, @OpenClaw, and @openai Codex-style agent patterns behave reliably on custom stacks and inference endpoints: · Stable prompts for KV reuse and lower TTFT · Interleaved reasoning + tool calls preserved across turns · Streaming tool dispatch instead of end-of-turn buffering · Harness behavior aligned with real multi-turn agent runtimes If you' re building your own agent stack or serving endpoint, this blog goes through the infrastructure issues that tend to show up in practice and the patterns we' ve been using to fix them. Tech blog ➡<https://nvda.ws/4dj5KzF>\*\* — NVIDIAAI | 2026-05-09 03:36 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/NVIDIAAI/status/2052835023217103080>

摘要/说明: Most agentic stacks run into the same problems pretty quickly: reasoning and tool parsing drift across turns, KV cache reuse falls apart, or tools fire too late. We' ve been hardening Dynamo' s harness-facing path so @Claudeai Code, @OpenClaw , and @openai Codex

22. \*\*Nvidia Stock Investors Just Got Great News From Wall Street Experts (Hint: It Could Be a \$20 Trillion Company) - The Globe and Mail\*\* — The Globe and Mail | 2026-05-10 17:23 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMinAJBVV95cUxNT0cwMy1vY2VzZURxSmlkZGNab2ota kFlZ084Szdaml0ejF3Q3NMTk1OU1NhcmQ1bFJTV0F6QWZ6bkRpV0s4dGhIZHJ2c00xWGlySnBIeVpM Qjc1aXFjMTVjSWtqcS1hM3R2dG92N0I0TFNSMmdENkE3dTBTSTUwOWxqM1V1RTZhUE42ZUNHeWo tM3RQcXgxdS1pVzFLYnFPNjRSTmxRbllzaXU4Q29qNUNRSVppZU41d0hhSS1Rb1R0VHpRQ2syaEFBdF E5VFNUaWZ1dWFhME55clBULWhqY3FYTElfVGloSWplRV9OSjdmUFczZVI5c05pTmN0TXRaR3JpdmR wUlBFWWxQdDJPnFFYTXdETXZ0aTRDYQ?oc=5>

摘要/说明: Nvidia Stock Investors Just Got Great News From Wall Street Experts (Hint: It Could Be a \$ 20 Trillion Company) The Globe and Mail

23. **\*\*Google Stock Week Ahead: Alphabet's \$4.9 Trillion Run Faces EU Risk and Its Next AI Test - TechStock<sup>2</sup>\*\*** — TechStock<sup>2</sup> | 2026-05-10 20:28 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiqgFBVV95cUxOZHMXdW1aN3ZXYTY5QXRfak9DcH QyeENzaTNqU3lzNEhlMFM3UDg0dGRNYmVtVy0tZXJiUXdycktqZWZYczI5ekIzQzJJWUdGVGVHNXlM QlJQVEpUdTlRZV94VjFKcUQyQmJSTXpRN2lGajVPSTJoMWk5eFJSR1ZnU0xaRjRsbU1Ob1lmZXdKNm VpdTBpd1ZSTEdad2lzZUUtS0lly3pkT3hndw?oc=5>

摘要/说明: Google Stock Week Ahead: Alphabet's \$4.9 Trillion Run Faces EU Risk and Its Next AI Test TechStock<sup>2</sup>

24. **\*\*Google to allow AI use in engineering interviews, signalling hiring shift - Storyboard18\*\*** — Storyboard18 | 2026-05-10 13:51 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMixwFBVV95cUxQUjJsSkFSZEtpTX1IUWV1RXA3TWk1b npOTEU4emM2WU5kbUjIoc1GZ1NrRVY1dEZJVFJUNTRDS1Npd2twVFFXbzM2NnduS2RrTnkyTUhab k9RVnVlNnlUXzY1OGw2YTVxOVhSTmFCMmNtTGNBNWVnUzVEd1pJSHNCNmNWM2UwVWdXTGhn Tkpua3dTRHUwVFlIYnZxanQwYmltdGpxb2c1MTNaMDdnY2NIUFdDUFh2VzJncnlyU0FvVXNHV1RrV 2c40gHHAUFVX3lxTFBSMmxKQVJkS2lNeUhRZXVFcDdNaTVuek5MRTh6YzZZTmRtQmI4LUZnU2tFVj V0RklUUIQ1NENLU2l3a3BUUVdvMzY2d25LZGtOeTJNSFpuT1FWdWU2eVRfNjU4bDZhNXE5WFJOYUI yY21MY0E1ZWdTNUR3WklIc0I2Y1YzZTBVZ1dMaGdOSm5rd1NEdTBUWUhidnFqdDBiaW10anFvZzUx M1owN2djY0hQV0NQWHZXMmdyeXJTQW9Vc0dXVGtXZzg?oc=5>

摘要/说明: Google to allow AI use in engineering interviews, signalling hiring shift Storyboard18

25. **\*\*Should You Buy Nvidia Stock Before May 20? Here's What History Says.\*\*** — bing | 2026-05-10 13:37 BJT | news\_rss | 指标: N/A | 置信度: 中高

链接: <https://www.fool.com/investing/2026/05/10/should-you-buy-nvidia-stock-before-may-20-heres-wh/>

摘要/说明: According to data compiled by Yahoo! Finance, Wall Street analysts expect Nvidia to deliver \$78.8 billion in revenue and \$1.77 in earnings per share (EPS) for the quarter. These figures are in line ...

26. **\*\*What we know about US stress tests of Google, xAI and Microsoft AI models - Reuters\*\*** — Reuters | 2026-05-06 06:07 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiugFBVV95cUxOUgllVGc2b1dwV0tKNHNRc25vVmlpdTFwd2ttR3lfb2NoSS1wQldqVzNCYTUyVjE5T3ZQjFqZnV3U0lFWXlaZHFtc1BjLXRNYV96d2F1akxqZUhkUFdxUVo5TUhuNTRoNFdreFpaRHJnU2V1X25NaHBuay1CVndPZG1TNWQzdmM4bzVHYnd4OGZlUUF0ZFF3WkVvV1hKUnhYbm9ja0VOU3VPYlJmTTcxWXF4ZFE?oc=5>

摘要/说明: What we know about US stress tests of Google, xAI and Microsoft AI models Reuters

27. **\*\*What OpenAI, Anthropic's new enterprise AI services ventures mean for Indian IT firms\*\*** — Bing | 2026-05-05 14:57 BJT | news\_rss | 指标: N/A | 置信度: 中高

链接: <https://indianexpress.com/article/technology/artificial-intelligence/openai-anthropic-enterprise-ai-services-ventures-it-sector-10674418/>

摘要/说明: It positions Anthropic and OpenAI in direct competition with some of the biggest IT consulting firms in the fast-growing market for corporate AI transformation.

28. **\*\*AMD Stock Is Up 320% Over the Past Year. Should Investors Shift Their Attention Away From Nvidia? - AOL.com\*\*** — AOL.com | 2026-05-10 08:05 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMidkFVX3lxTE9tbXRPOVJEcFpSMm5OLTJOVW1zaVh6d3dORzczV3BxM3ZUOUplOE0yTUx0bzY4ajZPVEhJOG1QbkZwd2FPQmUyYkJwWklyVnA1QUU2S0pCODdzckwtM0JQVkr4ODBHeWo3OTdEZzhwdmF3SUVUMmc?oc=5>

摘要/说明: AMD Stock Is Up 320% Over the Past Year. Should Investors Shift Their Attention Away From Nvidia? AOL.com

29. **\*\*Chip Stocks Are Soaring While Software Slows. Is a Reversal Looming? - 24/7 Wall St.\*\*** — 24/7 Wall St. | 2026-05-10 19:30 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMirwFBVV95cUxPdGMxd1Z6bTBiRFYxcnV1ckZWOGJ0bmZNdGhETmFpbFU5M0pFTFV2MXNsQXdqbUN6V09OVjllqalh4MnlCbTdTamJXYmtZY1ZSV1dKZHdGSkw1UTMwdjBTNnVpc2NwN0p1T1NFM0FiQkNWWTFMb3FLVXNhNjF0eTJJNjVBaEx6WHYwRG16RnVvd1ExXzFLZjV6NTlydlp2bDVxSzZXU3FhM1JCaUFDY3Q4?oc=5>

摘要/说明: Chip Stocks Are Soaring While Software Slows. Is a Reversal Looming? 24/7 Wall St.

30. **\*\*Google I/O 2026: We Expect Updates for Gemini, Android XR Glasses and More - CNET\*\*** — CNET | 2026-05-10 15:11 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiigFBVV95cUxNczQxb1pYdUpRZ2NxbEN5NDlZRI1PS0I1a2szSGhOZlN1ZWc1TG95QUxSaHdZaXBEV1YzVGNISkx0czFxNGdycFgzMmtfNzJpZ2h4UUIMckdQeV NhZEFgVTN1M0ZXWW53Vlc0NFBjc19zTDlBSUx2ekhHNFpST0JNbFBNNF80TlJjOHc?oc=5>

摘要/说明: Google I/O 2026: We Expect Updates for Gemini, Android XR Glasses and More CNET

31. **\*\*Happy Friday! ☑We' re officially 11 days away from I/O (but the launches keep rolling in). Here' s what happened this week: — The @googlehealth app, featuring a personalized health coach built with Gemini that uses your wearables, favorite health & fitness apps, and medical records to deliver proactive wellness guidance that fits your life — Multi-Token Prediction (MTP) drafters in @googlegemma 4, which can speed up your workflows by up to 3X — Automatic source organization and customizable Mind Maps in @NotebookLM — Gemini API File Search tool updates with multimodal support, custom metadata, and page citations — Webhooks (now available in the Gemini API) replace continuous polling with push-based notifications — Some of our most popular AI features, like Nano Banana, Veo, and @googlephotos Remix are now available on Google TVs\*\*** — GoogleAI | 2026-05-09 00:34 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/GoogleAI/status/2052789253038592466>

摘要/说明: Happy Friday! ☑We' re officially 11 days away from I/O (but the launches keep rolling in). Here' s what happened this week: — The @googlehealth app, featuring a personalized health coach built with Gemini that uses your wearables, favorite health & fitness apps,

32. **\*\*Corning and Nvidia Multi-Year AI Deal: Stock Hits New Highs in 2026 - News and Statistics - IndexBox\*\*** — IndexBox | 2026-05-10 11:00 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMirgFBVV95cUxNNkY0X3dJU3JPbm1ZNzdzbk9kc0gyaEg3dGhCUHYyMTV6Z1IzV2hGcUkwU0NFdFVwSmFXRWZ6VHZ3NmN4WW9hM3FjOUg3X0l6dGg0UFVlRGFzcWZMa2hKNF9oVGxXd0JoeVZPck1ydWlyQ2Q2tTGVlQ2VoMXllQl8wS3ZoXzltQ3BEYUFqM3VuZDZ55dml3Q20yYVNCWUlxRjlGck90OFc5aWRpUET2RkE?oc=5>

摘要/说明: Corning and Nvidia Multi-Year AI Deal: Stock Hits New Highs in 2026 - News and Statistics IndexBox

33. **\*\*Prediction: Nvidia Will Outperform Alphabet and Amazon Combined Over the Next 3 Years - The Motley Fool\*\*** — The Motley Fool | 2026-05-10 18:38 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMimAFBVV95cUxPTlI2WUxFazdsLTF0SHMwVEJiZml4>

NkVVRW5yaE9hVjUzS0VRN3pZOEN1SlBKMgh0d1pTZTFkMnhlbG1pVVdOLUt4ZWR3azNHNGZnWVdLZ1BxVkhoV1FMdkRI dm0yREwyMFJabTktUGFEZWtyOWpjVXFHMmx2alhrdEhGUzJDcHJuTkZQT0hoZUVuM3ZQT3RkUg?oc=5

摘要/说明: Prediction: Nvidia Will Outperform Alphabet and Amazon Combined Over the Next 3 Years The Motley Fool

34. \*\*Prediction: Nvidia Will Outperform Alphabet and Amazon Combined Over the Next 3 Years - AOL.com\*\* — AOL.com | 2026-05-10 18:18 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMikgFBVV95cUxNQTBIV0dZbV9VYjJV aXJXYkliN2E5RkZTMWtyS290UkFEbXB1ZH ZrQW1tcnZ2MjdyOXZ2NkVlR3Q1N3FiS3hNWW11d3U3TEZhN0IwdVFEbE1qVGpVOWZrXzU2TVZBR0g3a3FFSTdXNVBEMXhQenVqNVpoWTJ6N0p4MVk4NTFxY01lQTlKN3hkTFdtZw?oc=5>

摘要/说明: Prediction: Nvidia Will Outperform Alphabet and Amazon Combined Over the Next 3 Years AOL.com

35. \*\*RT by @GoogleDeepMind: The future of Math is mathematicians and AI agents working together. Very pleased to introduce @GoogleDeepMind's AI co-mathematician: a multi-agent system designed to actively collaborate with human experts on open-ended research mathematics. Mathematicians testing the agent across areas as diverse as group theory, Hamiltonian systems, and algebraic combinatorics have reported impressive results. In autonomous mode evaluation on the rigorous FrontierMath Tier 4 problems, AI co-mathematician scored an unprecedented 48% — a new high score among all AI systems evaluated.\*\* — GoogleDeepMind | 2026-05-09 02:07 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/pushmeet/status/2052812585804685322>

摘要/说明: The future of Math is mathematicians and AI agents working together. Very pleased to introduce @GoogleDeepMind's AI co-mathematician: a multi-agent system designed to actively collaborate with human experts on open-ended research mathematics. Mathematicians t

36. \*\*RT by @demishassabis: The future of Math is mathematicians and AI agents working together. Very pleased to introduce @GoogleDeepMind's AI co-mathematician: a multi-agent system designed to actively collaborate with human experts on open-ended research mathematics. Mathematicians testing the agent across areas as diverse as group theory, Hamiltonian systems, and algebraic combinatorics have reported impressive results. In autonomous mode evaluation on the rigorous FrontierMath Tier 4 problems, AI co-mathematician scored an unprecedented 48% — a new high score among all AI systems evaluated.\*\* — demishassabis | 2026-05-09 02:07 BJT | x\_post | 指标: N/A (X API 不可用; 公

开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/pushmeet/status/2052812585804685322>

摘要/说明: The future of Math is mathematicians and AI agents working together. Very pleased to introduce @GoogleDeepMind 's AI co-mathematician: a multi-agent system designed to actively collaborate with human experts on open-ended research mathematics. Mathematicians t

37. **\*\*NVIDIA Launches Nemotron 3 Nano Omni Model, Unifying Vision, Audio and Language for up to 9x More Efficient AI Agents\*\*** — NVIDIA blog | 2026-04-29 00:00 BJT | official\_rss | 指标: N/A | 置信度: 中高

链接: <https://blogs.nvidia.com/blog/nemotron-3-nano-omni-multimodal-ai-agents/>

摘要/说明: AI agent systems today juggle separate models for vision, speech and language — losing time and context as they pass data from one model to the other. Unveiled today, NVIDIA Nemotron 3 Nano Omni is an open multimodal model that brings these capabilities together

38. **\*\*Autonomous AI at Scale: Adobe Agents Unlock Breakthrough Creative Intelligence With NVIDIA and WPP\*\*** — NVIDIA blog | 2026-04-20 21:00 BJT | official\_rss | 指标: N/A | 置信度: 中高

链接: <https://blogs.nvidia.com/blog/adobe-ai-agents-nvidia-wpp/>

摘要/说明: AI agents are transforming how work gets done across all industries, accelerating everything from content creation to decision-making. NVIDIA' s expanded strategic collaborations with Adobe and WPP are bringing agentic AI to the center of enterprise marketing o

39. **\*\*Nvidia Stock Analysis May 2026: AI Chip Giant Faces Critical Earnings Test - Intellectia AI\*\*** — Intellectia AI | 2026-05-10 08:11 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiakFVX3lxTE9FbHZ4SmR6RlJvenBhNV9ocIVxcVcyakhBTWlValB2ZWFqMlpoQ1ZJTkpWY0t4N1k1QThEVUxjTzRZRfV4QzBvejUzNlRRSEFvNGJsTkIVYlA2OFg0dkVaU3Y4TV9PZXpVVHc?oc=5>

摘要/说明: Nvidia Stock Analysis May 2026: AI Chip Giant Faces Critical Earnings Test Intellectia AI

40. **\*\*Nvidia Faces Application-Layer Pressure on Infrastructure Economics - Let's Data Science\*\*** — Let's Data Science | 2026-05-10 14:04 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMipAFBVV95cUxPTl84d2hST3E0NkEtVnhOenZ4VFRGTzh0aHJOQXY4b1RxZ2ItVC1vYUpDWnV3a0VCX3JaMEpJci1PZkpRWDhOODlybXlWY3ZQR3JjZV9QblZuUG9FQy1CemhuTU5IbEZscGItrktsMXBDZ19SVWJUd0hWbTlHdEJUc3ZJX1RoOW96MFNITkJaeXZkeDNJSGY0eUI2LTBqNVY2aHhseQ?oc=5>

摘要/说明: Nvidia Faces Application-Layer Pressure on Infrastructure Economics Let'

## s Data Science

41. **Google I/O 2026: Gemini 4.0, Android 17, XR glasses and what more to expect** — bing | 2026-05-10 09:57 BJT | news\_rss | 指标: N/A | 置信度: 中高

链接: <https://www.msn.com/en-in/money/news/google-io-2026-gemini-40-android-17-xr-glasses-and-what-more-to-expect/ar-AA22P38T>

摘要/说明: Google I/O 2026 starts on May 19 with expected announcements around Android 17, Gemini 4.0, AI-powered XR glasses and a possible new Aluminum OS platform.

42. **Anthropic's revenue just passed OpenAI's for the first time — \$30 billion run rate while spending 4x less on training** — bing | 2026-05-07 16:00 BJT | news\_rss | 指标: N/A | 置信度: 中高

链接: <https://www.msn.com/en-us/news/technology/anthropic-s-revenue-just-passed-openai-s-for-the-first-time-30-billion-run-rate-while-spending-4x-less-on-training/ar-AA22CH2Q>

摘要/说明: Anthropic, the maker of Claude, has reached a \$30 billion annualized revenue run rate, a figure that, based on the most recent publicly reported numbers from its chief rival, appears to place it ahead ...

43. **What Coherent (COHR)'s NVIDIA Alliance and AI Wafer Expansion Means For Shareholders - simplywall.st** — simplywall.st | 2026-05-10 13:03 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMivgFBVV95cUxOY3p2UUtobjZjU3dDRXp1Y2trT0VHd29lMFZJeVBUMjBtNGMtVTBCNEF3aTFVVRlFvR19EVI9FSjROM2ZfX29HdkVTQ2NOT0ZobzFzMDI2YXBZYUJFYVVVMHRnelP0U0hxbIJuWEpZWmZhUHIweVlRR1F5QUE0c1dkdnA4M1pFMjMxRWWhBV3VlMngwSDFNdTRnNVc5akRJVGw0RFllbFFoeUMtMU5QNnVtdW9SSGxOS1lkODlnMk1R0gHDAUFVX3lxTE9saXp6UzEyMEJtNDNtRXc4Z3dwcmU5MFRWdkpmSENlMlBsLTF4eXAwYVJXdG1MdWFuekV1SUtLYUc2X1Y1NF9EcWpuZGdpUEhPYldrjdVQUNWMVJOeFZpMkZFQ2ZjNHRXSUhwem1XeTVEZmgxb3k4M201Sm9BaXE5SWNPUMtXMXRnV2VIUlpGbU95MHh2UWdDa3dDNmFYNGYyU0d2OWN6QzNSbnQ0aUFxM3NaWTBXWmNzVmVNOXo0ZVRQOA?oc=5>

摘要/说明: What Coherent (COHR)'s NVIDIA Alliance and AI Wafer Expansion Means For Shareholders simplywall.st

44. **Google Finance, an AI investment tool, comes to Israel - The Jerusalem Post** — The Jerusalem Post | 2026-05-10 18:07 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiYkFVX3lxTE5UWEt6cGIxMzZKRi1ULUhFSGtwczZrRDhFa0xGQm5uRU1lSkczT2RFMFF0VHFqV1FKOEV5eVZZam5EQWExcUlsZVRldW8yV0d0eUx1NEFBQV9tRzNwMmFyZDJn?oc=5>

摘要/说明: Google Finance, an AI investment tool, comes to Israel The Jerusalem Post

45. **\*\*US Government Expands AI Testing Agreements to Google DeepMind, Microsoft, and xAI - H2S Media\*\*** — H2S Media | 2026-05-06 14:47 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMiqAFBVV95cUxObIFPRDVScERleG0weXE1bG1hdTRxN19jUnFYczhyNktLcWZVMTZvS2hKTHBLOVhXdXVOODRobHRZQTZRLXE0Y21nNnZla05ObUNGMDIMWGV5eUtJTVk3RXl2Nm5TR2lEVzFlamFkeG45cDFxaHRocXh2ellHaXBjbm9fVE1IWnJBWDBSblRVNzBYWnJaRVMxYm14R1VYVjhTRjZMOHlGbEw?oc=5>

摘要/说明: US Government Expands AI Testing Agreements to Google DeepMind, Microsoft, and xAI H2S Media

46. **\*\*New Adobe Premiere Color Grading Mode Accelerated on NVIDIA GPUs\*\*** — NVIDIA blog | 2026-04-15 21:00 BJT | official\_rss | 指标: N/A | 置信度: 中高

链接: <https://blogs.nvidia.com/blog/rtx-ai-garage-nab-adobe-premiere-color-mode/>

摘要/说明: The NAB Show 2026 trade show, running April 18-22 in Las Vegas, is set to showcase a wave of new features and optimizations for top video editing applications. Bringing together over 60,000 content professionals from across the broadcast and media and entertain

47. **\*\*IREN Inks Deal With Nvidia, Scoring Major Victory for the Data Center Stock. Here's What Investors Need to Know\*\*** — bing | 2026-05-08 16:56 BJT | news\_rss | 指标: N/A | 置信度: 中高

链接: <https://www.fool.com/investing/2026/05/08/iren-inks-deal-with-nvidia-scoring-major-victory-f/>

摘要/说明: IREN announced a strategic partnership with Nvidia, as well as a separate deal to provide cloud services for the artificial intelligence chip giant.

48. **\*\*NVIDIA and ServiceNow Partner on New Autonomous AI Agents for Enterprises\*\*** — NVIDIA blog | 2026-05-06 01:00 BJT | official\_rss | 指标: N/A | 置信度: 中高

链接: <https://blogs.nvidia.com/blog/servicenow-autonomous-ai-agents-enterprises/>

摘要/说明: Enterprise AI has learned to generate. It has learned to reason. Now companies are asking the next question: How should AI act? Early agent systems have shown what's possible, moving beyond simple prompts to take on more complex tasks. The next step is bringin

## 金融全量资讯池

1. **\*\*Iran has submitted response to latest US proposal to end 10 weeks of war\*\*** — Bloomberg / @business; Javier Blas; FinancialJuice | 2026-05-10 20:42 BJT | X snippet | 指标: N/A (X API 不可用; 公开

RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/business/status/2053455753852112986>

摘要/说明: 同一信号被 Bloomberg、Javier Blas、FinancialJuice、FirstSquawk 多账号转述; 细节仍等待官方文件。

2. **\*\*Aramco CEO warns 1 billion barrels lost will slow oil market recovery\*\*** — Reuters / @Reuters | 2026-05-10 20:05 BJT | 媒体 + X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 高

链接: <https://www.reuters.com/business/energy/aramco-ceo-warns-1-billion-barrels-lost-will-slow-oil-market-recovery-2026-05-10/>

摘要/说明: 即便 Hormuz 重新开放, 库存与物流恢复不是瞬时; 油价风险溢价可能粘性更强。

3. **\*\*Aramco Q1 profit jumps ~25-26% as Hormuz risks push pipeline to full capacity\*\*** — Reuters/Bloomberg/CNBC | 2026-05-10 13:22-16:27 BJT | 媒体/RSS + X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 高

链接: <https://www.reuters.com/business/energy/saudi-aramcos-q1-profit-rises-25-higher-sales-2026-05-10/>

摘要/说明: 战时油价抬升和管道满负荷把能源地缘风险转化为公司利润与进口国通胀压力。

4. **\*\*SEC delay on prediction markets ETFs echoes long-fought bitcoin ETF battle\*\*** — CNBC / @CNBC | 2026-05-10 20:29 BJT | 媒体 + X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 高

链接: <https://www.cnbc.com/2026/05/10/sec-prediction-markets-etfs-trading-launch-delay.html>

摘要/说明: 预测市场从应用走向 ETF 化, 监管路径可能复制 Bitcoin ETF 的漫长博弈。

5. **\*\*Digital Asset Holdings raising at around \$2B valuation with a16z crypto among investors\*\*** — Bloomberg / @business | 2026-05-10 20:01 BJT | X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中

链接: <https://x.com/business/status/2053445334865432630>

摘要/说明: 机构链上结算继续获得资本支持, 银行/交易所后端 tokenization 不是单纯零售 crypto 叙事。

6. **\*\*Memory chip makers look at 'supercycle' and windfall gains; stocks jumped 30% in one week\*\*** —

CNBC / @CNBC | 2026-05-10 19:27 BJT | 媒体 + X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 高

链接: <https://www.cnbc.com/2026/05/10/memory-chip-makers-are-looking-at-a-supercycle-and-wind-fall-gains-the-stocks-jumped-30percent-in-one-week.html>

摘要/说明: 半导体供给紧张会同时推高 AI capex、亚洲出口收入和通胀/利率敏感资产波动。

7. \*\*FT poll: tariffs and Iran war are hurting US midterm prospects\*\* — Financial Times / @FT | 2026-05-10 18:30 BJT | X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中

链接: <https://x.com/FT/status/2053422334795465083>

摘要/说明: 关税与战争成本进入选民感受, 政策不确定性可能在中期选举前反馈到市场风险溢价。

8. \*\*The Week Ahead: CPI, Retail Sales, Fed Speakers and AI Earnings Test Record Stock Rally\*\* — FX Empire / Bing News RSS | 2026-05-10 11:59 BJT | RSS/snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中

链接: <https://www.fxempire.com/forecasts/article/the-week-ahead-cpi-retail-sales-fed-speakers-and-ai-earnings-test-record-stock-rally-1596894>

摘要/说明: 下周宏观数据与 AI earnings 同时检验高估值; 利率路径和 AI 盈利兑现会共同驱动指数。

9. \*\*Private credit trouble may be costly for sector investors but manageable for broader financial system\*\* — WSJ Markets / @WSJmarkets | 2026-05-10 11:01 BJT | X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中

链接: <https://x.com/WSJmarkets/status/2053309352593740005>

摘要/说明: 私募信贷是信用周期噪声源; 若损失仍局限, 系统性冲击暂时低于市场恐慌叙事。

10. \*\*Michael Saylor hints Strategy is “back to work” buying more bitcoin; crypto social/risk appetite remains hot\*\* — Bitcoin Magazine / Cointelegraph / @WatcherGuru | 2026-05-10 19:29 BJT | X snippet | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中

链接: <https://x.com/BitcoinMagazine/status/2053437354883354885>

摘要/说明: BTC 资金流和上市公司资产负债表策略继续影响 crypto beta; 但社交过热本身也是反向风险信号。

11. \*\*It’s a challenging labor market for those just starting out, and new job seekers will likely have to recalibrate their earning potential. Today’s college seniors expect to make about \$80,000 one year

after graduation, according to a survey of undergraduates pursuing a bachelor's degree by real estate site Clever in February and March. Yet, the average starting salary for recent graduates is \$56,153, Clever found, a difference of nearly \$24,000. Learn more: <http://cnb.cx/4epy0CQ>\*\* — CNBC | 2026-05-10 19:00 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/CNBC/status/2053429878356123927>

摘要/说明: It's a challenging labor market for those just starting out, and new job seekers will likely have to recalibrate their earning potential. Today's college seniors expect to make about \$80,000 one year after graduation, according to a survey of undergraduates pu

12. \*\*Another reminder that the resumption of a more normal oil market isn't as simple as flicking a light switch. Via Bloomberg, Aramco CEO Amin Nasser warned that even if the Strait of Hormuz reopens immediately, "it will take a few months for the oil market to rebalance." And if "trade and shipping remain curtailed by more than a few weeks from today, we anticipate the supply disruption to persist, and the market to normalize only in 2027." oil energy economy middleeastwar markets\*\* — elerianm | 2026-05-10 20:51 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/elerianm/status/2053457788949430739>

摘要/说明: Another reminder that the resumption of a more normal oil market isn't as simple as flicking a light switch. Via Bloomberg, Aramco CEO Amin Nasser warned that even if the Strait of Hormuz reopens immediately, "it will take a few months for the oil market to re

13. \*\*Aramco CEO warns 1 billion barrels lost will slow oil market recovery <http://reut.rs/4u9YFJ2> <http://reut.rs/4u9YFJ2>\*\* — Reuters | 2026-05-10 20:05 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/Reuters/status/2053446208622919989>

摘要/说明: Aramco CEO warns 1 billion barrels lost will slow oil market recovery [reut.rs/4u9YFJ2](http://reut.rs/4u9YFJ2) [reut.rs/4u9YFJ2](http://reut.rs/4u9YFJ2)

14. \*\*SEC delay on prediction markets ETFs echoes a long-fought bitcoin fund battle [https://www.cnbc.com/2026/05/10/sec-prediction-markets-etfs-trading-launch-delay.html?taid=6a007a44999f620001573fe2&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/10/sec-prediction-markets-etfs-trading-launch-delay.html?taid=6a007a44999f620001573fe2&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter)\*\* — CNBC | 2026-05-10 20:29 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/CNBC/status/2053452477987541327>

摘要/说明: SEC delay on prediction markets ETFs echoes a long-fought bitcoin fund battle [cnbc.com/2026/05/10/sec-pred...](https://www.cnbc.com/2026/05/10/sec-pred...)

15. \*\*The wait stretched on for Iran's response to a US proposal to end 10 weeks of war, as the world's largest oil company warned it would take months for the market to return to normal even if the Strait of Hormuz reopened immediately. [https://www.bloomberg.com/news/articles/2026-05-10/us-awaits-iran-reply-as-aramco-says-hormuz-opening-no-quick-fix?taid=6a003c2dc46961000181e0fb&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-10/us-awaits-iran-reply-as-aramco-says-hormuz-opening-no-quick-fix?taid=6a003c2dc46961000181e0fb&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter)\*\* — business | 2026-05-10 16:05 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/business/status/2053385809122709944>

摘要/说明: The wait stretched on for Iran's response to a US proposal to end 10 weeks of war, as the world's largest oil company warned it would take months for the market to return to normal even if the Strait of Hormuz reopened immediately. [bloomberg.com/news/articles/2026-05-10/us-awaits-iran-reply-as-aramco-says-hormuz-opening-no-quick-fix?taid=6a003c2dc46961000181e0fb&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-10/us-awaits-iran-reply-as-aramco-says-hormuz-opening-no-quick-fix?taid=6a003c2dc46961000181e0fb&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter)

16. \*\*Memory chip makers are looking at a 'supercycle' and 'windfall gains.' The stocks jumped 30% in one week [https://www.cnbc.com/2026/05/10/memory-chip-makers-are-looking-at-a-supercycle-and-windfall-gains-the-stocks-jumped-30percent-in-one-week.html?taid=6a006b99ce5385000126d622&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/10/memory-chip-makers-are-looking-at-a-supercycle-and-windfall-gains-the-stocks-jumped-30percent-in-one-week.html?taid=6a006b99ce5385000126d622&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter)\*\* — CNBC | 2026-05-10 19:27 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/CNBC/status/2053436726773735782>

摘要/说明: Memory chip makers are looking at a 'supercycle' and 'windfall gains.' The stocks jumped 30% in one week [cnbc.com/2026/05/10/memory-c...](https://www.cnbc.com/2026/05/10/memory-chip-makers-are-looking-at-a-supercycle-and-windfall-gains-the-stocks-jumped-30percent-in-one-week.html?taid=6a006b99ce5385000126d622&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter)

17. \*\*Check the last column in this Bloomberg table. Markets are now signaling no meaningful rate movement from the Federal Reserve well into next year, with the implied rate remaining anchored in the 3.6% to 3.7% range. [economy federalreserve markets growth inflation](https://www.bloomberg.com/news/articles/2026-05-09/economy-federalreserve-markets-growth-inflation)\*\* — elerianm | 2026-05-09 03:53 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/elerianm/status/2052839230238306774>

摘要/说明: Check the last column in this Bloomberg table. Markets are now signaling no meaningful rate movement from the Federal Reserve well into next year, with the implied rate remaining anchored in the 3.6% to 3.7% range. [economy federalreserve markets growth in](https://www.bloomberg.com/news/articles/2026-05-09/economy-federalreserve-markets-growth-inflation)

18. \*\*As recruitment firms shed large parts of their workforce across the globe, growing demand for recruiters in the US points to a stronger-than-expected job market. [https://www.bloomberg.com/news](https://www.bloomberg.com/news/articles/2026-05-09/recruitment-firms-shed-workforce-globally-demand-for-recruiters-us)

/articles/2026-05-10/job-market-for-recruiters-shows-uk-weakness-us-strength?taid=6a0028e3ce5385000126d4ee&utm\_campaign=trueanthem&utm\_content=business&utm\_medium=social&utm\_source=twitter\*\* — business | 2026-05-10 14:42 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/business/status/2053365096265457988>

摘要/说明: As recruitment firms shed large parts of their workforce across the globe, growing demand for recruiters in the US points to a stronger-than-expected job market. bloomberg.com/news/articles/...

19. \*\*Iran denies reports of oil leak near Kharg Island export hub <http://reut.rs/3Rf8ZAC> <http://reut.rs/3Rf8ZAC>\*\* — Reuters | 2026-05-10 20:30 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/Reuters/status/2053452587165266315>

摘要/说明: Iran denies reports of oil leak near Kharg Island export hub [reut.rs/3Rf8ZAC](http://reut.rs/3Rf8ZAC) [reut.rs/3Rf8ZAC](http://reut.rs/3Rf8ZAC)

20. \*\*Nvidia appoints Suzanne Nora Johnson to board of directors\*\* — financialjuice | 2026-05-10 17:36 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/financialjuice/status/2053408861579542574>

摘要/说明: Nvidia appoints Suzanne Nora Johnson to board of directors

21. \*\*"Inflation alone is getting worse. It's not even stalled out in progress. It's getting worse. Where as the job market has been stable," says Federal Reserve Bank of Chicago President Austan Goolsbee. Watch our full interview here: <https://bloom.bg/4uCWIEH>\*\* — BloombergTV | 2026-05-09 04:49 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/BloombergTV/status/2052853319236743626>

摘要/说明: "Inflation alone is getting worse. It's not even stalled out in progress. It's getting worse. Where as the job market has been stable," says Federal Reserve Bank of Chicago President Austan Goolsbee. Watch our full interview here: [bloom.bg/4uCWIEH](https://bloom.bg/4uCWIEH) Video

22. \*\*Nvidia's Market Cap Grows Bigger Than a BRICS Country's Stock Market - InteractiveCrypto\*\* — InteractiveCrypto | 2026-05-10 13:26 BJT | news\_rss | 指标: N/A | 置信度: 中

链接: <https://news.google.com/rss/articles/CBMitAFBVV95cUxPNno4d2g5emMweHRHVGlXalBjRmREQmNKd2pycUVLREI5UDNWWVBpNlVHdkRZTWctT1J6ZXh6MVV6dlgyWE9GMDBXc1RPbURudU96ODMtbVZJcnZIUTduMW9wVzIUC29od041UGZkR0t0a2FBQ0JhLV9VdmtrbWk3blZhLVB5UHN3VzIpeURP>

VDBNUFctcVV5cmhSV1RzSkdRNmwwVGExOWRxYWRJLUtYSElPN1Y?oc=5

摘要/说明: Nvidia' s Market Cap Grows Bigger Than a BRICS Country' s Stock Market InteractiveCrypto

23. \*\*RT by @WhiteHouse: Devastating, left-wing policies out of NYC and Albany are permanently driving New York families and jobs out of state. Every single day, more and more New Yorkers are hitting their breaking point and fleeing to states where their money will go further. It' s difficult to accept why these knucklehead politicians would deliberately drive their own constituents away like this.\*\*

— WhiteHouse | 2026-05-10 06:50 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/epaleezeldin/status/2053246278591455258>

摘要/说明: Devastating, left-wing policies out of NYC and Albany are permanently driving New York families and jobs out of state. Every single day, more and more New Yorkers are hitting their breaking point and fleeing to states where their money will go further. It' s di

24. \*\*According to a new FT poll, the president' s tariffs and the war in Iran are hurting his party' s midterm prospects. Read more here: <https://ft.trib.al/43406WN>\*\* — FT | 2026-05-10 18:30 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/FT/status/2053422334795465083>

摘要/说明: According to a new FT poll, the president' s tariffs and the war in Iran are hurting his party' s midterm prospects. Read more here: [ft.trib.al/43406WN](https://ft.trib.al/43406WN)

25. \*\*Opinion: France has some of the greenest energy on Earth – all thanks to its decision, after the oil shock of 1973, to stop relying on expensive fossil fuels from the unreliable Gulf. Now, others could follow <https://ft.trib.al/de5d4gb> \*\* — FT | 2026-05-10 20:01 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/FT/status/2053445238425825720>

摘要/说明: Opinion: France has some of the greenest energy on Earth – all thanks to its decision, after the oil shock of 1973, to stop relying on expensive fossil fuels from the unreliable Gulf. Now, others could follow [ft.trib.al/de5d4gb](https://ft.trib.al/de5d4gb)

26. \*\*Saudi Aramco reported a 26% increase in first-quarter profit as a war-induced rise in oil prices helped counter lower exports [https://www.bloomberg.com/news/articles/2026-05-10/aramco-profit-climbs-as-war-driven-oil-rise-offsets-export-hit?taid=6a001c4d999f620001573e80&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-10/aramco-profit-climbs-as-war-driven-oil-rise-offsets-export-hit?taid=6a001c4d999f620001573e80&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter)\*\* — business | 2026-05-10 13:49 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/business/status/2053351582771609615>

摘要/说明: Saudi Aramco reported a 26% increase in first-quarter profit as a war-induced rise in oil prices helped counter lower exports bloomberg.com/news/articles/...

27. \*\*Top Wall Street analysts recommend these 3 dividend stocks for stable income [https://www.cnbc.com/2026/05/10/top-wall-street-analysts-recommend-these-stocks-for-stable-income.html?taid=6a0072ac4b0f79000163b94c&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/10/top-wall-street-analysts-recommend-these-stocks-for-stable-income.html?taid=6a0072ac4b0f79000163b94c&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter)\*\* — CNBC | 2026-05-10 19:57 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/CNBC/status/2053444324335943878>

摘要/说明: Top Wall Street analysts recommend these 3 dividend stocks for stable income cnbc.com/2026/05/10/top-wall...

28. \*\*Retailers are on a hiring spree. But consumers are sending warning signs [https://www.cnbc.com/2026/05/10/retailer-hiring-consumer-warning-jobs-report.html?taid=6a006ce879a4a40001b2ed71&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/10/retailer-hiring-consumer-warning-jobs-report.html?taid=6a006ce879a4a40001b2ed71&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter)\*\* — CNBC | 2026-05-10 19:32 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/CNBC/status/2053438130724757603>

摘要/说明: Retailers are on a hiring spree. But consumers are sending warning signs cnbc.com/2026/05/10/retailer...

29. \*\*Malaysian Prime Minister Anwar Ibrahim will unveil a plan soon to shore up the country's oil supply as uncertainties stemming from the conflict in Iran continue, Bernama reported [https://www.bloomberg.com/news/articles/2026-05-10/anwar-to-outline-malaysia-oil-supply-continuity-plan-bernama?taid=6a000ead999f620001573e5a&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-10/anwar-to-outline-malaysia-oil-supply-continuity-plan-bernama?taid=6a000ead999f620001573e5a&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter)\*\* — business | 2026-05-10 12:50 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/business/status/2053336954347966763>

摘要/说明: Malaysian Prime Minister Anwar Ibrahim will unveil a plan soon to shore up the country's oil supply as uncertainties stemming from the conflict in Iran continue, Bernama reported bloomberg.com/news/articles/...

30. \*\*WATCH: US employment increased more than expected in April while the unemployment rate held steady at 4.3%, pointing to labor market resilience and reinforcing expectations that the Federal

Reserve would leave interest rates unchanged for some time <https://reut.rs/49i95h6>\*\* — ReutersBiz | 2026-05-09 01:30 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/ReutersBiz/status/2052803215494676715>

摘要/说明: WATCH: US employment increased more than expected in April while the unemployment rate held steady at 4.3%, pointing to labor market resilience and reinforcing expectations that the Federal Reserve would leave interest rates unchanged for some time [reut.rs/49i](https://reut.rs/49i)

31. \*\*Iran has submitted its response to the latest US proposal to end 10 weeks of war, the state-run Islamic Republic News Agency reported on Sunday, without providing any further details. [https://www.bloomberg.com/news/articles/2026-05-10/iran-submitted-response-to-us-peace-plan-proposal-irna-reports?taid=6a007d51999f620001573ffa&utm\\_campaign=trueanthe&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-10/iran-submitted-response-to-us-peace-plan-proposal-irna-reports?taid=6a007d51999f620001573ffa&utm_campaign=trueanthe&utm_content=business&utm_medium=social&utm_source=twitter)\*\* — business | 2026-05-10 20:42 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/business/status/2053455753852112986>

摘要/说明: Iran has submitted its response to the latest US proposal to end 10 weeks of war, the state-run Islamic Republic News Agency reported on Sunday, without providing any further details. [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/)

32. \*\*UAE says air defences dealt with two drones coming from Iran <http://reut.rs/4fd5qos> <http://reut.rs/4fd5qos>\*\* — Reuters | 2026-05-10 20:25 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

链接: <https://x.com/Reuters/status/2053451250767712517>

摘要/说明: UAE says air defences dealt with two drones coming from Iran [reut.rs/4fd5qos](https://reut.rs/4fd5qos) [reut.rs/4fd5qos](https://reut.rs/4fd5qos)

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
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44. \*\*OIL MARKET ON EDGE AS IRAN STALLS Iran has yet to respond to a US plan to end 10 weeks of war and reopen the Strait of Hormuz, keeping global oil markets under pressure. President Donald Trump warned the US could “go a different route” if Tehran rejects the deal, which would reopen shipping lanes in exchange for easing sanctions. Saudi Aramco CEO Amin Nasser said even if Hormuz reopened now, oil markets would take months to recover — and disruptions lasting weeks could delay normalization until 2027.\*\* — DeItaone | 2026-05-10 17:27 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

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52. \*\*Maersk CEO Warns Iran War Is A "New Wake-Up Call" For Global Trade <https://www.zerohedge.com/geopolitical/maersk-ceo-warns-iran-war-new-wake-call-global-trade>\*\* — zerohedge | 2026-05-10 19:35 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

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摘要/说明: WATCH: The S&P 500 and the Nasdaq notched record highs, boosted by gains in chipmakers and other AI-related stocks, while a stronger-than-expected jobs report pointed to labor market resilience [reut.rs/3OVisMV](https://reut.rs/3OVisMV) Video

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55. \*\*My major takeaways from this morning's US Jobs Report: 1. Upside Surprise: Monthly job creation once again beat expectations. At 115,000, the April print was nearly double the consensus forecast. 2. Steady Unemployment: The unemployment rate held at 4.3%, as the consensus anticipated. 3. Moderate Wage Growth: At 0.2%, monthly growth in average earnings was slightly below the 0.3% consensus—a signal that counters fears of a tight labor market fueling a wage-price spiral. 4. Participation Friction: Instead of edging up toward 62.0%, the labor force participation rate came in at 61.8%. 5. Wash-out Revisions: While March's blockbuster figure was revised higher, it was offset by a downward revision to February, leaving a net change of -16,000. In sum, this data release confirms a resilient labor market despite recent headwinds from the Middle East War. The demand side remains robust, while the supply side continues to navigate the dual issues of retirements and fewer immigrants. And also drawing on other data from this week, what is "good news" for the financial markets and the Federal Reserve (muted earnings) risks amplifying concerns regarding the future economic, social and political implications of labor's declining share of GDP. economy jobs employment earnings markets unemployment\*\* — elerianm | 2026-05-08 21:17 BJT | x\_post | 指标: N/A (X API 不可用; 公开 RSS/Nitter 不提供浏览量/点赞/转发) | 置信度: 中高

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摘要/说明: Economists are saying a rate cut isn’ t likely in the next few months. It could make inflation even worse. It’ s time to brace for more pain ahead.

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ors sit at Mila, NYU, Samsung SAIL, and Brown. None at Meta. Yann's bet was that the path to machine intelligence runs through world models, not language models. He left a public company to build it. Each JEPAs paper from his network resets the assumed cost structure for that bet. This one makes world modeling laptop-cheap. Meta still has the GPUs. The architecture left. — <https://x.com/aakashgupta/status/2052977133073690820>

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