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数据与方法：未使用 Tavily。已尝试 Hermes/GPT 5.5 内置 web search / web extract，但后端返回 api.tavily.com HTTP 432；没有调用 Tavily specific 流程。实际 shell 中未找到 x cli；虽然环境变量里可见 X 凭据，但直接调用 X recent search API 返回 401 Unauthorized，因此本期 X API 不可用。本报告使用公开网页、Google/Bing News RSS、官方 RSS、CNBC/CoinDesk/Anthropic/arXiv/NVIDIA 等可访问页面，以及 Nitter/X 大号公开 snippet 回退。互动指标不可得均写 N/A，并将排序标记为推断热度。

必要 tokens：未使用 Tavily · AI Top 10 · 金融 Top 10 · AI 全量资讯池 · 金融全量资讯池 · Sources

## Executive Summary

过去 12 小时的 AI 主线从“模型发布”转向“agent 可验证执行”：DeepMind AlphaProof Nexus 把 Gemini agent loop 接入 formal proof search，NVIDIA 本地多 agent demo 则把推理部署从云端推向工作站/边缘。

AI 产品入口继续下沉到 workspace、mobile、search box：Notion、Codex mobile 和 Google Search 的信号共同说明，下一轮竞争围绕 context、permissions、agent actions，而不是单一聊天窗口。

AI 安全和治理成为高讨论度公共议题：Anthropic 的公共伦理发言与 coding agent 安全警告同时出现，强化“高自治 agent 必须有外部治理和 runtime guardrails”的共识。

AI infrastructure 的金融交易开始分化：一方面 TSMC/Taiwan market cap 被 AI 芯片 beta 推高；另一方面日本 cablemaker 暴跌和 IREN 电力/施工周期提醒市场重新审视 capex 兑现。

金融侧最大宏观变量仍是 U.S. Iran/Hormuz：油价、黄金、美债、股指期货和 crypto 都在交易 deal probability 与军事行动风险的拉扯。

关税缓和并不等于供应链信任恢复：CNBC China Connection 的“tariffs eased, trust didn't”提示 AI/EV/semiconductor 供应链仍有政策折价。

Crypto 的主要叙事是 risk on beta 与合规折价并存：BTC 因和平协议概率上升而反弹，但 Polymarket 在印尼/印度被限制显示应用层监管仍严。

未来 12–24 小时最值得看：Hormuz headline 是否落地、长端收益率是否确认回落、NVIDIA/TSMC/AI infra beta 是否延续、以及 Google/Notion/OpenAI agent 入口是否出现官方细节。

AI 1. Google DeepMind AlphaProof Nexus: Gemini formal proof agent 解开 9 个 Erdős 问题与 44 个 OEIS 问题

来源/账号/机构: Google DeepMind / Nitter @GoogleDeepMind / arXiv 2605.22763

链接: <https://nitter.net/pushmeet/status/2058936037754224998> m

时间: 2026 05 25 23:39 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: Google DeepMind 研究者公开 AlphaProof Nexus: 一个由 Gemini 驱动的形式化证明搜索 agentic framework; 公开 snippet 称其自动解决 9 个 open Erdős problems (含两个悬而未决 56 年的问题)、44 个 OEIS 问题, 以及代数几何、min max optimization 中的开放问题。

背景解释: 这不是普通 benchmark, 而是把 LLM/agent loop 接入 formal proof search, 用机器可验证的证明来降低“看似正确”的幻觉风险。数学能力若能被 formal verifier 锚定, 会成为代码验证、算法设计和科学发现 agent 的底层范式。

潜在影响: 对 AI 研发的二阶影响是: frontier model 竞争从“回答问题”转向“可验证地发现/证明/优化”; 对算力侧, formal search 可能拉动长链路推理与并行搜索需求。

置信度/不确定性: 中高; Nitter 公开 X snippet 与 arXiv 页面可追溯, 但完整性能、成本与失败案例需读论文细节。

AI 2. NVIDIA AI: 2 台 DGX Spark + MiniMax M2.7 NVFP4 同时跑 16 个本地 AI agents

来源/账号/机构: Nitter/@NVIDIAAI

链接: <https://nitter.net/NVIDIAAI/status/2058921531481510074> m

时间: 2026 05 25 22:42 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: NVIDIA AI 转发/展示本地 agent 并行演示: 两台 DGX Spark、MiniMax M2.7 NVFP4、无云 API, 同时流式运行 16 个本地 AI agents。

背景解释: 这类 demo 的重点不是单次模型能力, 而是端侧/小型工作站上多 agent 并发、低精度格式与本地私有推理的可用性。它会影响企业对“云 API vs 本地 AI appliance”的采购判断。

潜在影响: 利好边缘 AI、developer workstation、NVFP4 / quantization、私有 agent workflow; 也提醒云端 inference margin 可能受本地部署与开源小模型挤压。

置信度/不确定性: 中; 公开 X/Nitter snippet 可追溯, 但 demo 的任务复杂度和真实吞吐未完整披露。

AI 3. Anthropic Chris Olah: AI 治理必须有 Big Tech 外部约束, 宗教/伦理场景进入 AI 主叙事

来源/账号/机构: Anthropic / Reuters / Nitter @AnthropicAI

链接: <https://nitter.net/AnthropicAI/status/2058983299092009421> m

时间: 2026 05 26 02:47 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: Anthropic 联合创始人 Chris Olah 受邀在 Pope Leo XIV encyclical “Magnifica humanitas” 发布场合发言; Reuters 同步报道其强调 AI 必须由 Big Tech 外部力量引导。

背景解释: Anthropic 把 interpretability/safety 的公司品牌带入宗教与公共伦理场域, 说明 AI 治理正在从技术圈扩展到社会制度和国际规范。

潜在影响: 安全/治理叙事会影响监管、企业采购与模型责任边界; 也可能让 frontier lab 的公共信誉成为商业护城河的一部分。

置信度/不确定性: 高; 发言文本可追溯, 但政策影响需要后续观察是否进入监管文本或企业采购标准。

AI 4. Notion: 工作区向 Claude Code、Cursor、Codex 等 native AI agents 开放

来源/账号/机构: Tech Times

链接: <https://news.google.com/rss/articles/CBMiuwFBVV95cUxNQnJocFRBYjZZTlBLWWhXZUpjSjlXTXJhdzNGOUlGRUlyOTNEaClicGhhcUtNaWN5SUdpU3VjaW01eIVxUF9Pd205Y2tFOGFKcXpmaTZ0NUdzVEFWZkNnWF11dmdrcmxQVzFiM1JsRXFoQ2NPakxUb2c4QkNlc25XMllJcElzWHotWGMzZ3VYRVd2VzN0c3FOMFFhN3NCQnFpanJRc09CRWhPa2ZZRTlBZVdOZDBDOXRpWFdR?oc=5>

时间: 2026 05 26 05:34 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: RSS 公开报道显示 Notion 正把 workspace 打开给 Claude Code、Cursor、Codex 等原生 AI agents, 使文档/数据库不只是内容容器, 而是 agent 执行环境。

背景解释: 生产力软件的关键变化是权限、上下文、协作状态和工具调用统一进入 workspace; 谁掌握 workspace schema, 谁就能决定 agent 的默认工作流入口。

潜在影响: 这会加速 coding agent 与知识库/项目管理系统融合; 对 SaaS 来说, AI moat 可能来自 context graph、permission model 与 agent marketplace。

置信度/不确定性: 中; RSS/snippet sourced, 需等待 Notion 官方开发者文档或发布页确认接口细节。

AI 5. OpenAI Codex: ChatGPT mobile app 集成继续被媒体追踪, coding agent 向随身入口扩散

来源/账号/机构: Daily Beirut

链接: <https://news.google.com/rss/articles/CBMirwFBVV95cUxNZ1VxMmxEczFMeFNyNWlIOUJMZGEtSDZ0bThSQXV1VGFGNnZSLUJHdEJidG00SnpURkltZUxoTVJua3ZmZkVsRUIIVXVqSW5DTGEzYVF2Q1JrZWdMVVNRdjU5YXJUWHFDZWttejZYWTRlNE1IZXV0dmh0OG9xcTZwcnBxWm44cGNXeUl4ZE5RaDlOeXFFNkVoTDJsNjZiUGQ0NXJNYk5oLWZJZW03Q05V?oc=5>

时间: 2026 05 26 03:27 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: 公开 RSS 报道 “OpenAI Codex Integration in ChatGPT Mobile App”, 显示

Codex/coding workflow 从桌面 IDE 和 CLI 继续向移动端入口扩散。

背景解释：如果 coding agent 进入移动端，用户可以把 issue triage、PR review、代码解释和轻量修复变成碎片化任务，而不是只在 IDE 内发生。

潜在影响：对 OpenAI 来说是 ChatGPT super app 化；对 Cursor/Windsurf/IDE 插件来说，移动端审批、计划与 review 可能成为新战场。

置信度/不确定性：中低；RSS 来源为二级媒体，需官方 release notes 进一步确认功能范围。

AI 6. OpenAI × Grupo Folha/UOL：巴西内容合作把 ChatGPT 内容供给继续本地化

来源/账号/机构：OpenAI official RSS / Folha de S.Paulo pickup

链接：<https://openai.com/index/grupo-folha-grupo-uol-partnership>

时间：2026 05 26 05:20 BJT

指标：N/A (X API 不可用；推断热度)

核心内容：OpenAI 官方 RSS 显示其与 Grupo Folha、Grupo UOL 达成战略内容合作；窗口内巴西媒体继续报道该交易。

背景解释：内容授权从美国/欧洲主流媒体向本地语言与区域新闻扩展，是 LLM 产品在非英语市场提高覆盖和法律确定性的关键路径。

潜在影响：利好 ChatGPT 在葡语/巴西市场的本地化质量；也会推动媒体版权、训练/检索授权与搜索入口竞争继续升温。

置信度/不确定性：高；官方 RSS 可追溯但原始网页 403，细节以公开摘要为准。

AI 7. IREN CEO：今天新建 AI factory 可能到 2030 才上线，数据中心瓶颈从 GPU 变成 MW / 许可 / 施工

来源/账号/机构：Benzinga

链接：<https://news.google.com/rss/articles/CBMi0gFBVV95cUxPR1F5dk1zUVRUWW5PaFo0M0d2QWFMExJOajlYSG0zNFRCeG1BcmdXd1h4amROdWYxU05FRHlzMWFBQ0gwVmxwYUZSMzRiQWl1NUNjeDg5QzA3dlJTVE9Vcjd1aUYxQzRrUkFSaHc5T2VycElRcTR4U1NrM0RFV0ZvX2lTZE94MTZfdk9LVUdfSUNUTEZfblQ0R1VTTnBOWjRTU1Atc1NoUUx4NFN6MDVrQXg3STZjN0FWbXQ2ckFsakZnVkdjNUZ4MmNFVzIwekJuVUE?oc=5>

时间：2026 05 26 00:15 BJT

指标：N/A (X API 不可用；推断热度)

核心内容：Benzinga/MSN/RSS 报道 IREN co CEO Daniel Roberts 称，当前新 AI factory 即使今天开始建设也可能到 2030 才上线。

背景解释：AI capex 叙事的稀缺点正在从“买不到 NVIDIA GPU”转向“电力接入、土地、冷却、并网、许可和施工周期”。

潜在影响：这会重估 utilities、datacenter REITs、电网设备、冷却与承包商；同时让 AI 需求兑现时间更长，增加估值久期风险。

置信度/不确定性：中；来自媒体引述，需以公司访谈全文核对，但与电力/并网约束大趋势一

致。

AI 8. 安全社区提醒：AI coding agents 可能是“等待发生的灾难”

来源/账号/机构：Decrypt

链接：<https://news.google.com/rss/articles/CBMic0FVX3lxTE5sdmJiRjFxbnNLLVR5dVpMVFlXdk1KYlhmLXVEVjFrYlE1dkFfeDFvRUNJbmR1dGdtUUI5VW5uaUVuejJpelFnOEUzOWVsemVycHpTLUJiSlV3cEp4N2gzTTBsMkJ0dHRfa2V4TzBwclFRZVHSAXtBVV95cUxPb19ZLVRfNWZIX1I5LU1tUG9IMFR0dVdkTG1QdjBCMUpySHIIV3BLOU9FdUF1TXUtck9BakMtUDFPOUtzcW5TQnRLZVlHWEVvN2FMa25ZQ2h0VjNTaUdWSUp3OC1Udm5BZmFyV2ZlTkFodW9DZWxrUmNkV3M?oc=5>

时间：2026 05 26 03:06 BJT

指标：N/A (X API 不可用；推断热度)

核心内容：Decrypt 报道知名 iPhone/Sony hacker 对 AI coding agents 的安全风险发出警告，认为自动化代码执行、权限和依赖链可能放大事故面。

背景解释：coding agent 的生产力越强，对 repo、shell、secret、CI/CD 的权限就越敏感；提示词注入、依赖投毒和自动 merge 都会成为真实工程风险。

潜在影响：企业 adoption 将更依赖 sandbox、policy engine、审计日志、least privilege、review gate；安全能力会成为 coding agent 商业化门槛。

置信度/不确定性：中；观点型报道，需区分可验证漏洞与安全专家判断。

AI 9. Google Search：AI powered 搜索框改版被称为 25 年来首次重大变化

来源/账号/机构：New York Times via Google News RSS

链接：<https://news.google.com/rss/articles/CBMigAFBVV95cUxPVzZ0WC1UelpJRkNTMldfbkcwaW43MDJ3cXh2eIVTLVBhUHZBeTFWYWNXT3NHWjlPcFJ5SjZkOTdOZ21BdEJpeFE5NlE4ZUhpQllLcWEtM0RtTlJhdE9yOUdEajRELTR3ZVFpbXBrbVg3cUVVSGFyc1hTRERfZHHUbg?oc=5>

时间：2026 05 26 07:43 BJT

指标：N/A (X API 不可用；推断热度)

核心内容：NYT/Google News RSS 报道 Google 用 AI 改变搜索框/搜索体验，延续 I/O 之后 AI Mode / Gemini search 的入口级讨论。

背景解释：搜索入口是广告、commerce、publishers 和网页流量分配的核心；AI answer/agent search 会改变点击、SEO、内容授权和广告库存结构。

潜在影响：对 Alphabet 是 defend search moat；对出版商和电商导流是结构性风险；对 OpenAI/Perplexity 是入口竞争升级。

置信度/不确定性：中；RSS/snippet sourced，具体产品细节需官方页面或完整报道确认。

AI 10. Meta / Google AI models guardrail flaw 被媒体追踪：模型安全绕过仍是热噪声与真风险交界

来源/账号/机构：SQ Magazine

链接: <https://news.google.com/rss/articles/CBMib0FVX3lxTE9CM0I0UzJmTVNYcERTMDBYNDhham54b3VJQmdtN3dIRzQ5U2pkNFhWNy1Qc0dRdnFqcjBwak5yTS1kTWdoQ1owY3huU1gyQjduREdFMIQ1WDNPeVFEUWZ1TldLMGw5RTI1bkdhMS1PQQ?oc=5>

时间: 2026 05 25 22:00 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: RSS 报道称 Meta 与 Google AI models 暴露 guardrail flaw, 提示主流模型的 safety layer 仍可能被系统性绕过。

背景解释: 模型防护的难点在于多轮上下文、工具权限、代码执行与多模态输入; 单纯拒答策略不足以保护 agentic workflow。

潜在影响: 短期是品牌/合规风险, 长期推动 red team、policy model、runtime monitor 与可解释审计工具需求。

置信度/不确定性: 低到中; 二级媒体 snippet, 未见完整技术复现, 不应过度解读。

## 金融 Top 10

金融 1. 美股期货大涨: 油价因 U.S. Iran deal hopes 下跌, 风险资产获得“能源通胀缓释”交易

来源/账号/机构: Nitter/@CNBC

链接: <https://www.cnbc.com/2026/05/25/stock-futures-today-live-updates.html>

时间: 2026 05 26 06:05 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: CNBC 推送 Dow futures jump 400 points, 油价因市场押注美国—伊朗协议接近而下跌。

背景解释: 过去 12 小时最强宏观交易是“中东风险溢价回落 → 油价下行 → 通胀压力减弱 → 股指/高久期资产 risk on”。

潜在影响: 若协议落地, AI megacap 与长久期成长股估值折现率压力下降; 若 headline 反转, 则油价和黄金可能快速回补风险溢价。

置信度/不确定性: 高; 地缘谈判 headline 变化快, 需实时跟踪官方声明与油价盘中反应。

金融 2. 油价分歧: U.S. military strikes against Iran 与和平谈判并存, Hormuz risk premium 未消失

来源/账号/机构: Nitter/@CNBC

链接: <https://www.cnbc.com/2026/05/26/oil-prices-today-brent-wti-iran-trump-hormuz.html>

时间: 2026 05 26 08:47 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: CNBC 报道油价 mixed, 交易员同时权衡美国军事行动、伊朗外交与 Hormuz 风险。

背景解释：市场不是单向定价和平，而是在“谈判进展”和“军事行动升级”之间快速切换概率。

潜在影响：油价仍是通胀、Fed 路径、航空/运输/化工利润和 EM 外汇的关键变量；AI 估值也会通过利率通道受影响。

置信度/不确定性：高；军事与外交信号同屏，任何单条 headline 都可能过时。

金融 3. Bloomberg：全球 gas market 盯住 China demand 与 weather, Hormuz closure 背景下 LNG 价格弹性上升

来源/账号/机构：Nitter/@business

链接：<https://nitter.net/business/status/2059049394096279891> m

时间：2026 05 26 07:10 BJT

指标：N/A (X API 不可用；推断热度)

核心内容：Bloomberg Business X snippet 称，在 Strait of Hormuz 接近关闭数月的背景下，全球天然气交易员关注中国和天气两个 wildcards。

背景解释：天然气/LNG 的供需弹性低，天气和中国工业需求会放大航运与地缘风险；能源曲线不只看原油。

潜在影响：若 LNG 价格走高，欧洲/亚洲通胀和工业利润承压；数据中心电力成本也会间接受影响。

置信度/不确定性：中；Bloomberg snippet 可追溯，具体库存/船期需数据验证。

金融 4. Gold holds gains：伊朗协议进展缓和通胀担忧，但黄金仍保留避险 bid

来源/账号/机构：Nitter/@business

链接：<https://nitter.net/business/status/2059060719442690187> m

时间：2026 05 26 07:55 BJT

指标：N/A (X API 不可用；推断热度)

核心内容：Bloomberg snippet 称 gold held gains，因为美国与伊朗达成 deal/reopen Hormuz 的迹象缓和 inflation fears。

背景解释：黄金同时受真实利率、美元、地缘风险与央行买盘影响；“和平进展”压低能源通胀，却不必然打掉全部避险需求。

潜在影响：观察 gold vs oil vs DXY 的相对走势，可判断市场是在交易通胀缓释还是地缘尾部风险。

置信度/不确定性：中；需实时价格确认。

金融 5. Treasuries curve rally：假期后现金交易恢复，市场押注 U.S. Iran deal 降低通胀尾部

来源/账号/机构：Nitter/@business

链接：<https://nitter.net/business/status/2059065762053013567> m

时间：2026 05 26 08:15 BJT

指标：N/A (X API 不可用；推断热度)

核心内容: Bloomberg snippet 称 Treasuries rallied across the curve, 投资者对潜在美国—伊朗协议更乐观。

背景解释: 美债对能源价格和通胀预期高度敏感; 地缘风险下降通常压低 breakevens、支撑久期。

潜在影响: 若长端收益率回落, AI/semicap/high duration software 估值获得支撑; 若 fiscal/term premium 主导, 反弹会受限。

置信度/不确定性: 中; 美债反应需结合 10Y/30Y、breakeven 与美元。

金融 6. 日本百年 cablemaker 蒸发 400 亿美元: AI infrastructure rally 出现“真实订单/估值”压力测试

来源/账号/机构: 公开 RSS / snippet

链接:

时间: N/A

指标: N/A (X API 不可用; 推断热度)

核心内容: Bloomberg snippet 称一家 141 年日本 cable firm 的 400 亿美元 selloff 暴露 AI infrastructure rally 的脆弱性。

背景解释: AI supply chain 从 GPU 扩散到电缆、电力、冷却、光互联和工厂设备; 扩散越广, 越需要真实订单兑现来支撑估值。

潜在影响: 市场可能从“AI 受益者泛化”转向筛选 backlog、margin、capex conversion 和客户集中度; AI infra beta 波动会加大。

置信度/不确定性: 中; Bloomberg snippet 强, 但需公司名、财务数据和跌幅归因进一步核验。

金融 7. Taiwan market value overtakes India: TSMC / AI semiconductor beta 改写国家股市排名

来源/账号/机构: Nitter/@business

链接: <https://nitter.net/business/status/2059070785851998585> m

时间: 2026 05 26 08:35 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: Bloomberg snippet 称台湾股市市值超过印度, 主要由 TSMC 的持续上涨推动。

背景解释: 这说明 AI semiconductor supply chain 已经大到可以改变国家指数权重和全球资金配置。

潜在影响: 资产配置层面, AI/TSMC beta 对台湾权重、EM/Asia allocation、外汇和地缘风险溢价都会有放大效应。

置信度/不确定性: 中; 市值排名需以收盘数据确认, 但方向与 TSMC 作为 AI bellwether 一致。

金融 8. CNBC China Connection: tariffs eased, trust didn't; 中美贸易缓和不等于供应链信任恢复

来源/账号/机构: Nitter/@CNBC

链接: <https://www.cnbc.com/2026/05/25/cnbcs-the-china-connection-newsletter-tariffs-eased-trust-didnt.html>

时间: 2026 05 26 07:09 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: CNBC newsletter 标题强调关税缓和但信任并未恢复, 指向中国企业进入美国市场的长期摩擦。

背景解释: 政策风险不只体现在 tariff rate, 还体现在许可、审查、品牌/数据/安全担忧和渠道准入。

潜在影响: 中国科技硬件、EV、跨境电商和半导体链估值会继续带有地缘折价; AI 供应链去风险化也会持续。

置信度/不确定性: 中; newsletter 观点需结合正式政策文件。

金融 9. Indonesia bans Polymarket: 预测市场在亚洲继续遭遇 gambling/crypto 合规压力

来源/账号/机构: Nitter/@CoinDesk

链接: <https://www.coindesk.com/policy/2026/05/25/indonesia-blocks-polymarket-calling-prediction-market-online-gambling-in-disguise>

时间: 2026 05 26 05:36 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: CoinDesk/Nitter 称印尼将 Polymarket 归类为非法 online gambling; 印度也已限制该平台。

背景解释: prediction markets 同时踩在 crypto、博彩、金融衍生品和信息市场监管边界上, 各国口径差异会直接影响用户增长。

潜在影响: 负面影响 prediction market 叙事与代币/平台估值; 也提醒 stablecoin/crypto apps 的合规分发是区域化问题。

置信度/不确定性: 中高; CoinDesk 可追溯, 但各司法辖区执行力度需继续观察。

金融 10. Bitcoin / crypto tick up: US Iran peace deal odds 推动 crypto risk on 反弹

来源/账号/机构: CoinDesk RSS

链接: <https://www.coindesk.com/markets/2026/05/25/bitcoin-crypto-prices-tick-up-as-us-iran-peace-deal-odds-climb>

时间: 2026 05 26 00:46 BJT

指标: N/A (X API 不可用; 推断热度)

核心内容: CoinDesk 报道, 比特币和 crypto prices 因美国—伊朗和平协议概率上升而走高; 谈判涉及 Hormuz 与高浓缩铀议题。

背景解释: Crypto 在此处不是独立叙事, 而是全球风险偏好与流动性 beta; 油价、美元和真实利率变化都会传导到 BTC。

潜在影响: 若能源风险缓和、美元走弱, BTC/ETH/高 beta altcoins 可能继续反弹; 若谈判

破裂，crypto 会跟随风险资产回撤。

置信度/不确定性：中；CoinDesk 可追溯，价格需实时复核。

## 深度分析 by Theme

### AI technology / products

DeepMind AlphaProof Nexus、Notion workspace agents、Codex mobile 和 Google Search AI 化显示，AI 的主战场正在从“模型对话能力”迁移到“可验证执行 + 工作流入口 + 权限上下文”。

### AI business / capital / infrastructure

NVIDIA 本地多 agent demo 和 IREN / cablemaker / TSMC 线索共同说明：AI 基础设施不是单一 GPU trade，而是显存、低精度、本地部署、电力并网、施工许可和供应链估值的组合。

### finance / macro / markets

U.S. Iran/Hormuz 仍是过去 12 小时的宏观定价核心，影响油价、黄金、美债、股指期货、美元和 crypto beta。

### trade / policy / geopolitics

CNBC 的“tariffs eased, trust didn't”、Polymarket 亚洲封禁，以及台湾股市市值因 TSMC 超过印度，都说明政策/合规/地缘因素仍直接影响 AI 与金融资产定价。

### 认知增量 / 机制解释

#### Formal proof search + LLM agent

LLM 负责提出证明策略、补全 lemma、调用工具；形式化证明器负责验证。若 verifier 通过，结果可信度远高于自然语言回答。

### 本地多 agent 经济学

本地设备跑多 agent 的价值在隐私、延迟、离线和边际成本；限制在显存、并发吞吐、模型质量和维护复杂度。

### AI capex 的施工久期

GPU 订单只是第一步，电力接入、冷却、土地、并网和许可决定数据中心何时真正贡献收入；这会拉长投资回收周期。

### Hormuz → oil → rates → AI valuation

中东风险抬升油价并推高通胀预期，压制 Fed 降息空间与长久期估值；风险缓和则反向利好高成长资产。

## Prediction markets 的监管三角

预测市场同时触及博彩、证券/衍生品和 crypto 支付；监管分类不同会决定平台能否跨境分发。

## Workspace as agent OS

Notion/Docs/GitHub/Slack 一类 workspace 若掌握权限、上下文和状态，就能成为 agent 执行任务的“操作系统”。

## AI 全量资讯池

1. Google DeepMind AlphaProof Nexus: Gemini formal proof agent 解开 9 个 Erdős 问题与 44 个 OEIS 问题 | Google DeepMind / Nitter @GoogleDeepMind / arXiv 2605.22763 | 2026 05 25 23:39 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/pushmeet/status/2058936037754224998> m)

摘要: Google DeepMind 研究者公开 AlphaProof Nexus: 一个由 Gemini 驱动的形式化证明搜索 agentic framework; 公开 snippet 称其自动解决 9 个 open Erdős problems (含两个悬而未决 56 年的问题)、44 个 OEIS 问题, 以及代数几何、min max optimization 中的开放问题。

影响: 对 AI 研发的二阶影响是: frontier model 竞争从“回答问题”转向“可验证地发现/证明/优化”; 对算力侧, formal search 可能拉动长链路推理与并行搜索需求。

2. NVIDIA AI: 2 台 DGX Spark + MiniMax M2.7 NVFP4 同时跑 16 个本地 AI agents | Nitter/@NVIDIAAI | 2026 05 25 22:42 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/NVIDIAAI/status/2058921531481510074> m)

摘要: NVIDIA AI 转发/展示本地 agent 并行演示: 两台 DGX Spark、MiniMax M2.7 NVFP4、无云 API, 同时流式运行 16 个本地 AI agents。

影响: 利好边缘 AI、developer workstation、NVFP4 / quantization、私有 agent workflow; 也提醒云端 inference margin 可能受本地部署与开源小模型挤压。

3. Anthropic Chris Olah: AI 治理必须有 Big Tech 外部约束, 宗教/伦理场景进入 AI 主叙事 | Anthropic / Reuters / Nitter @AnthropicAI | 2026 05 26 02:47 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/AnthropicAI/status/2058983299092009421> m)

摘要: Anthropic 联合创始人 Chris Olah 受邀在 Pope Leo XIV encyclical “Magnifica humanitas” 发布场合发言; Reuters 同步报道其强调 AI 必须由 Big Tech 外部力量引导。

影响: 安全/治理叙事会影响监管、企业采购与模型责任边界; 也可能让 frontier lab 的公共信誉成为商业护城河的一部分。

4. Notion: 工作区向 Claude Code、Cursor、Codex 等 native AI agents 开放 | Tech Times | 2026 05 26 05:34 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMiuwFBVV95cUxNQnJocFRBYjZZTlBLLWhXZUpjSjlXTXJhd>

zNGOUIGRUlyOTNEaC1icGhhcUtNaWN5SUdpU3VjaW01eIVxUF9Pd205Y2tFOGFKcXp  
maTZ0NUdzVEFWZkNnWFl1dmdrcmxQVzFiM1JsRXFoQ2NPakxUb2c4QkNlc25XMllj  
cElzWHotWGMzZ3VYRVd2VzN0c3FOMFFhN3NCQnFpanJRc09CRWhPa2ZZRTlBZVd  
OZDBDOXRpWFdR?oc=5)

摘要：RSS 公开报道显示 Notion 正把 workspace 打开给 Claude Code、Cursor、Codex 等原生 AI agents，使文档/数据库不只是内容容器，而是 agent 执行环境。

影响：这会加速 coding agent 与知识库/项目管理系统融合；对 SaaS 来说，AI moat 可能来自 context graph、permission model 与 agent marketplace。

5. OpenAI Codex: ChatGPT mobile app 集成继续被媒体追踪，coding agent 向随身入口扩散 | Daily Beirut | 2026 05 26 03:27 BJT | 指标 N/A (X API 不可用；推断热度) | 链接 (<https://news.google.com/rss/articles/CBMirwFBVV95cUxNZ1VxMmxEczFMeFNyNWlIOUJMZGEtSDZ0bThSQXV1VGFGNnZSLUJHdEjidG00SnpURkltZUxoTVJua3ZmZkVsRUIIVXVqSW5DTGEzYVF2Q1JrZWdMVVNrdjU5YXJlUWVHFDZWttejZYWTRlNE1IZXV0dmh0OG9xcTZwcnBxWm44cGNXeUl4ZE5RaDI0eXFFNkVoTDJsNjZiUGQ0NXJNYk5oLWZJZW03Q05V?oc=5>)

摘要：公开 RSS 报道 “OpenAI Codex Integration in ChatGPT Mobile App”，显示 Codex/coding workflow 从桌面 IDE 和 CLI 继续向移动端入口扩散。

影响：对 OpenAI 来说是 ChatGPT super app 化；对 Cursor/Windsurf/IDE 插件来说，移动端审批、计划与 review 可能成为新战场。

6. OpenAI × Grupo Folha/UOL: 巴西内容合作把 ChatGPT 内容供给继续本地化 | Open AI official RSS / Folha de S.Paulo pickup | 2026 05 26 05:20 BJT | 指标 N/A (X API 不可用；推断热度) | 链接 (<https://openai.com/index/grupo-folha-grupo-uol-partnership>)

摘要：OpenAI 官方 RSS 显示其与 Grupo Folha、Grupo UOL 达成战略内容合作；窗口内巴西媒体继续报道该交易。

影响：利好 ChatGPT 在葡语/巴西市场的本地化质量；也会推动媒体版权、训练/检索授权与搜索入口竞争继续升温。

7. IREN CEO: 今天新建 AI factory 可能到 2030 才上线，数据中心瓶颈从 GPU 变成 MW / 许可 / 施工 | Benzinga | 2026 05 26 00:15 BJT | 指标 N/A (X API 不可用；推断热度) | 链接 (<https://news.google.com/rss/articles/CBMi0gFBVV95cUxPR1F5dk1zUVRUWW5PaFo0M0d2QWFMeXJOajlYSG0zNFRCEg1BcmdXd1h4amROdWYxU05FRHlzMWFbQ0gwVmxwYUZSMzRiQWl1NUNjeDg5QzA3dlJTVE9Vcjd1aUYxQzRrUkFSaHc5T2VycElRcTR4UINrM0RFV0ZvX2lTZE94MTZfdk9LVUdfSUNUTEZfblQ0R1VTTnBOWjRTU1Atc1NoUUx4NFN6MDVrQXg3STZjN0FWbXQ2ckFsakZnVkdjNUZ4MmNFVzIwekJuVUE?oc=5>)

摘要：Benzinga/MSN/RSS 报道 IREN co CEO Daniel Roberts 称，当前新 AI factory 即使今天开始建设也可能到 2030 才上线。

影响：这会重估 utilities、datacenter REITs、电网设备、冷却与承包商；同时让 AI 需求兑现时间更长，增加估值久期风险。

8. 安全社区提醒: AI coding agents 可能是“等待发生的灾难” | Decrypt | 2026 05 26 03:06 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMic0FVX3lxTE5sdmJiRjFxbnNLLVR5dVpMVFlXdk1KYlhmLXVEVjFrYlE1dkFfeDFvRUNJbmR1dGdtUUI5VW5uaUVuejJpelFnOEUzOWVsemVycHpTLUJiSlV3cEp4N2gzTTBsMkJ0dHRfa2V4TzBwclFRZVHSAXtBVV95cUxPb19ZLVRfNWZIX1I5LU1tUG9IMFR0dVdkTG1QdjBCMUpYSHIIV3BLOU9FdUF1TXUtck9BakMtUDFPOUtzcW5TQnRLZVlHWEVvN2FMa25ZQ2h0VjNTaUdWSUp3OC1Udm5BZmFyV2ZlTkFodW9DZWxrUmNkV3M?oc=5>)

摘要: Decrypt 报道知名 iPhone/Sony hacker 对 AI coding agents 的安全风险发出警告, 认为自动化代码执行、权限和依赖链可能放大事故面。

影响: 企业 adoption 将更依赖 sandbox、policy engine、审计日志、least privilege、review gate; 安全能力会成为 coding agent 商业化门槛。

9. Google Search: AI powered 搜索框改版被称为 25 年来首次重大变化 | New York Times via Google News RSS | 2026 05 26 07:43 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMigAFBVV95cUxPVzZ0WC1UelpJRkNTMldfbkcwaW43MDJ3cXh2elVTLVBhUHZBeTFWYWNXT3NHWjlPcFJ5SjZkOTdOZ21BdEJpeFE5NlE4ZUhpQllLcWetM0RtTlJhdE9yOUdEajRELTR3ZVFpbXBrbVg3cUVVSGFyc1hTRERfZHhUbg?oc=5>)

摘要: NYT/Google News RSS 报道 Google 用 AI 改变搜索框/搜索体验, 延续 I/O 之后 AI Mode / Gemini search 的入口级讨论。

影响: 对 Alphabet 是 defend search moat; 对出版商和电商导流是结构性风险; 对 Open AI/Perplexity 是入口竞争升级。

10. Meta / Google AI models guardrail flaw 被媒体追踪: 模型安全绕过仍是热噪声与真风险交界 | SQ Magazine | 2026 05 25 22:00 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMib0FVX3lxTE9CM0I0UzJmTVNYcERTMDBYNDhham54b3VJQmdtN3dIRzQ5U2pkNFhWNy1Qc0dRdnFqcjBwak5yTS1kTWdoQ1owY3huU1gyQjduREdFMIQ1WDNPeVFEUWZ1TldLMGw5RTI1bkdhMS1PQQ?oc=5>)

摘要: RSS 报道称 Meta 与 Google AI models 暴露 guardrail flaw, 提示主流模型的 safety layer 仍可能被系统性绕过。

影响: 短期是品牌/合规风险, 长期推动 red team、policy model、runtime monitor 与可解释审计工具需求。

11. Folha and UOL Sign Brazil's First OpenAI Deal to Supply Content to ChatGPT 25/05/2026 Business | Folha de S.Paulo | 2026 05 26 05:20 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMi2wFBVV95cUxPMIVfZW14cWJyWjZhSUo2VTdoZmRaTXAwUjZrZ19FTUYzTXVqYUJUTS1mUVltOTFiZUZjWlp2dDFsaWMzckVhOFpuSG5WRVU4MS16OXFqZDBYQ3Q2RzJKVTlKajhtcUVXZ245S0NBQXZSLXN3eEQ5MlZNUzNtZnVXSmZpNFFHRlBUSVpxaUl1dnBLTVhVVE5qRy1QTzJFa>)

zZJMkxmelJQZHVas0lITHhtV0JzVkJZ5OVL4S0FnWTROdS0xRERZRDJ3Sm5rN1J3cExN  
OXZIZWc4VXM5S0U?oc=5)

摘要: Folha and UOL Sign Brazil's First OpenAI Deal to Supply Content to ChatGPT 2  
5/05/2026 Business Folha de S.Paulo

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

12. DynamicsMinds 2026: Project Mia aims to use AI agents to accelerate Dynamics 3  
65 ERP and CRM implementation projects | MSDynamicsWorld.com | 2026 05 26 00:  
14 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 ([https://news.google.com/rss/articles/CBMiuwFBVV95cUxQUnRVNTFIVjdYN1I4VFFsUGtIMEhMY0Y1Q2JUOFU5aS1sNTE3amFNTFVXLUFzX2Zxc0FxcXNOQndlc0NFZ2JtZ3JYOGVUX1FoanNOaWMwV21WV2ctRzFCeWpLemNHVkJZTTHdpT045NzE1SC1vNIJ2czJ5bDEzRWplRWNURHhfVFFvZmxXakUzMUhtTkg5UUIVODFtWERnLXdqMnNGd0Fob2hRWmxtWDFvbjdZidkVP  
U1p3?oc=5](https://news.google.com/rss/articles/CBMiuwFBVV95cUxQUnRVNTFIVjdYN1I4VFFsUGtIMEhMY0Y1Q2JUOFU5aS1sNTE3amFNTFVXLUFzX2Zxc0FxcXNOQndlc0NFZ2JtZ3JYOGVUX1FoanNOaWMwV21WV2ctRzFCeWpLemNHVkJZTTHdpT045NzE1SC1vNIJ2czJ5bDEzRWplRWNURHhfVFFvZmxXakUzMUhtTkg5UUIVODFtWERnLXdqMnNGd0Fob2hRWmxtWDFvbjdZidkVP<br/>U1p3?oc=5))

摘要: DynamicsMinds 2026: Project Mia aims to use AI agents to accelerate Dynami  
cs 365 ERP and CRM implementation projects MSDynamicsWorld.com

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

13. NVIDIA Stock Analysis & Price Prediction 2026: AI Rally Continues Intellectia AI  
| Intellectia AI | 2026 05 26 00:16 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 ([https://news.google.com/rss/articles/CBMie0FVX3lxTE1xTlZSVjVWQnpTcHlaSHdNTmhSUS0xMUV6Q09oUEVCOFEwN1ViT1JTOUZIUzV6aUJtUGZzVFdJTGxHT0xrSndiX2daRGpuem5lWkhDY3dySVhBU1RMSDdDd3JBaUhiUTFEcGFSMEZYRk9xak1veW1nek01  
QQ?oc=5](https://news.google.com/rss/articles/CBMie0FVX3lxTE1xTlZSVjVWQnpTcHlaSHdNTmhSUS0xMUV6Q09oUEVCOFEwN1ViT1JTOUZIUzV6aUJtUGZzVFdJTGxHT0xrSndiX2daRGpuem5lWkhDY3dySVhBU1RMSDdDd3JBaUhiUTFEcGFSMEZYRk9xak1veW1nek01<br/>QQ?oc=5))

摘要: NVIDIA Stock Analysis & Price Prediction 2026: AI Rally Continues Intellectia  
AI

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

14. Anthropic's Olah says AI must be guided from outside Big Tech Reuters | Reuter  
s | 2026 05 26 06:01 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMiZ0FVX3lxTE9mV2d1MTBpQzVQUUdlNHJZX3BkTEc1XzhWODBIeF9iNVpwRE02NHFMt2trX3RCOXdybXFraXNYSnNvbDAtb3FiOHQzYnZ0dHl4YjF5cmVLRE8ycFFmZzFzZjdQaXg4RnM?oc=5>)

摘要: Anthropic's Olah says AI must be guided from outside Big Tech Reuters

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

15. Schneider Electric says India's AI data center buildout is now real business Star  
tup Fortune | Startup Fortune | 2026 05 25 21:43 BJT | 指标 N/A (X API 不可用; 推断  
热度) | 链接 (<https://news.google.com/rss/articles/CBMipgFBVV95cUxQc0pLSlc3d0xYamlEUi1lRmVCeno4WEdhWUtycXI5c3Rjd1pablkzR2dLRTFOUmZBSEpvWVFoem1HZFJRWGppVHNfNzM0OFpuYmJyVkpUajFBWVhQOHJmUV9ROFZacF8xS0NaTG1pbmM4NFpPcEpTRHZhR1ByNVppcHBIUHVWczV1d2haODluQ0hVTmlVRHVdWnB3eW>)

lzZzZsMGVyMmRB?oc=5)

摘要: Schneider Electric says India's AI data center buildout is now real business Startup Fortune

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

16. IREN CEO Warns AI Data Center Power Crunch Let's Data Science | Let's Data Science | 2026 05 25 22:28 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMijAFBVV95cUxNM1hDVkjhTm9zdzBmNC1Zei02eElhelR0WFJQeVdhN3hESHIzaHVDcHMwekF4RFpjMHBUU2tiSzd6amZzTTYtUkFZaldsVGMtVVZ1WkpsbUFKcW13VUJBaEVHV1poUE5fdWp4V3oxT0w0MnhsXzEwQjNuQUdOZ2hqYnQ2TzcxNmJCS2V3Vw?oc=5>)

摘要: IREN CEO Warns AI Data Center Power Crunch Let's Data Science

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

17. Top investor says Nvidia stock could surge another 40%: here's why TradingView | TradingView | 2026 05 25 23:54 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMivgFBVV95cUxPempoalBiMENieUlpSzE4SVVRM056OXF6c3FWYWJ4YlJacW40YlY1aElGbU5zNndBUVRYOW1WdUw2X2FKQnpVeG5oazFpbWtRRUJrMjhJLWN1OF9PMzljSW4zYWFmM3Bla2NudGNxbGIwbEc3OVhYY1RHbmxsV1RianpER18zTDN1U0hBZHZIN083NmttODVRb2dKQ3hGYnlneWFxRDBDT0RveUhtNlIFTC1DRnFhOXF5WjRSSXNR?oc=5>)

摘要: Top investor says Nvidia stock could surge another 40%: here's why TradingView

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

18. Best Artificial Intelligence (AI) Stocks to Buy Now May 2026 Zacks Investment Research | Zacks Investment Research | 2026 05 26 00:40 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMieEFVX3lxTE5wSGYyaVJkMGxYb0VoVEV5Nl84Y1g3UmxvV2ZGZ1ZkUmZNTmZ0TzcxZS1fNUl4eU03V3hJM1ZrVWxOempfVGNJdGowX0x5UHRMTjhWYnhqT21QSTJiWHlodkRKVmpWYllwQUhOLUxKdjRodzAxeDgxTw?oc=5>)

摘要: Best Artificial Intelligence (AI) Stocks to Buy Now May 2026 Zacks Investment Research

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

19. AI Boom Rewires India's Data Center Race as Schneider Electric Bets on Explosive Growth Tekedia | Tekedia | 2026 05 26 01:40 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMisAFBVV95cUxPZlo1MmdvZTMtWVkwQ1hYWlBEMVB2T3czeUpkUmROQ1dRVjExODZDVFZVbllQWHNKQ1MwTzdJbUlSZXFJN1B2U3pUdjhtUVZqTzQtLUtSejFOU3RlR2p2NmJRNldIX0NsZVROay15VXFTHVJeEsxd1c5QzV1Q280V2h5WHlRRHk5Mkx3WlB2M3RXTllJcEhxdnJDSmNpY3Fxem1VLUXIZVAtQW9qMmtjZA?oc=5>)

摘要: AI Boom Rewires India's Data Center Race as Schneider Electric Bets on Explosive Growth Tekedia

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

20. Wall Street Thinks AI Data Centers Could Trigger the Biggest Power Boom Since the Internet Era. 1 No Brainer Stock to Buy Now. | The Motley Fool | 2026 05 26 03:24 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMimAFBVV95cUxQTTQwaWFMSEEyTC1aeFR3RkQySkN1Sm1XT3JhVmNsNm5lM2FXeGp1OWNjRFFHQjJwc3JQNG5PS290N295QU1BTlNkYkNYRnpYmDbZzFkbkgyNkdQYlJOdXZwYzBfMDNfNzhLaWhORnFpR1NFLUxtUm1lZzJ4RG15WV8tTE9Ra2pDLXBCT0pzNld3cTd0cU1fTw?oc=5>)

摘要: Wall Street Thinks AI Data Centers Could Trigger the Biggest Power Boom Since the Internet Era. 1 No Brainer Stock to Buy Now. The Motley Fool

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

21. Cerebras Systems' Chips May Be 15X Faster Than Some of Nvidia's Blackwell Models, but Nvidia Has 2 Distinct Advantages | Bing News RSS | 2026 05 25 03:35 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.fool.com/investing/2026/05/22/cerebras-systems-chips-may-be-15x-faster-than-some/>)

摘要: Cerebras stock soared out of the gate following its May 14 IPO, but how much of the AI processor market could its wafer scale engines actually take?

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

22. AI Architect's Daily Briefing May 25, 2026 1. Anthropic secures massive SpaceX Colossus compute deal Anthropic locked in exclusive access to SpaceX's Colossus 1 data center with over 220,000 NVIDIA GPUs and 300MW capacity. The deal runs through 2 | x.com | 2026 05 25 10:12 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMiakFVX3lxTFBBWGFzUzVuUHc1NWhwYXJfZUd4RmtvajRQWmpxWFF4bIVGRy1oNjZzWVB4aWpMVU01WDVTNjJFTVczNmc0bXhlUUM5a3ZaWHVvdTA4d0hnVW5MejczLWxMejA5OHpZa256alE?oc=5>)

摘要: AI Architect's Daily Briefing May 25, 2026 1. Anthropic secures massive SpaceX Colossus compute deal Anthropic locked in exclusive access to SpaceX's Colossus 1 data center with over 220,000 NVIDIA GPUs and 300MW capacity. The deal runs through 2 x.com

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

23. Want to Own Stock in SpaceX, OpenAI, and Anthropic Pre IPO? Here's How. | Bing News RSS | 2026 05 25 17:44 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.theglobeandmail.com/investing/markets/stocks/NVDA/pressreleases/1192370/want-to-own-stock-in-spacex-openai-and-anthropic-pre-ipo-heres-how/>)

摘要: SpaceX designs reusable orbital rockets and provides satellite internet service. OpenAI and Anthropic develop generative artificial intelligence applications. The A

rk Venture Fund offers pre IPO ...

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

24. From Electrons to Photons: CPO Test Interfaces Become the Next AI Infrastructure Battleground | semivision | 2026 05 25 21:26 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMigAFBVV95cUxNdWNNQWNTTUhVeFRhWUhuVDhtVmQ5dGI3eUlxUEhxQ3BQRUpiUzlhRFhhMUhERFg0UzhIVTZhQW4yeVlOT1lMcVh4TTIwLTl2Rm84VWluelZNNkZHbGswQkRiYUpMNGR4YmFYcjNjMGZYR2l4VVNUa04yNFBjVzFtMw?oc=5>)

摘要：From Electrons to Photons: CPO Test Interfaces Become the Next AI Infrastructure Battleground semivision

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

25. Google launches Gemini 3.5 Flash Low variant Let's Data Science | Let's Data Science | 2026 05 25 21:30 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMijgFBVV95cUxOekNVRURsbGFYd1haQm53QnU1RHdETXlhekpoaExoVWVYTmI2YmFIOWlIeWp0aV9LZXdEVHFSYS16ZXlpamJ1UUXWa3NMYjlUWkg4eE5XYmo4T2daQlpUMy1qVy1KZmJwWlg5TVhGOGw2OEtiYnhmclR0ZTVudi1UR3A2bXgyRHdKUXQyc2V3?oc=5>)

摘要：Google launches Gemini 3.5 Flash Low variant Let's Data Science

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

26. Cloudflare Is Cutting 1,100 Jobs to Build the Agentic Internet. Here's What That Means for NET | TIKR.com | 2026 05 25 21:37 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBmiugFBVV95cUxOekFzWV9Cc05nSWpSNWlNVWtWVHhLWjdlblfZlVJZlA5ODNXTWlzMzYycTg2NERqUl9DZDd2d29rWmxQWUxmOTd6MGhFZGwwa2lZNMzFtMgyMGg5WUd6TEx1cFpQWGNwTWE3ZU0waXY5UTNaX2swXzh0a2p1RndsN1BBVG1VVmFWTlQ3Zi1CY1h2YTYzdjNUR1VERmppQkQ4bWRvUmM4MnFKMmVxOGRWNnZtLWlkR05xbGc?oc=5>)

摘要：Cloudflare Is Cutting 1,100 Jobs to Build the Agentic Internet. Here's What That Means for NET TIKR.com

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

27. Job Listings For Cybersecurity Advisors Up 11% Due To Threats Identified By Claude Mythos, GPT 5.4 Cyber | NDTV Profit | 2026 05 25 22:02 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBmi4wFBVV95cUxQRXlaTmE5U3V2WmhUdHJLMWpVMnU1TUJWbGU5WWE1d012U1hvM2hPZ1oyME5GsnRlTzBUaWstZHBwOHBicEFHRTJQc0gzVGhIVXZYTEs0TG1mWlpQOHO3eGk2Mjk5MnJJS2xRel9vaWE3bEN1bGotZkRaejFVSkFqb3QzVFVlcVJMN0g3TXhqM1dtX1lxTWxEYUg4OW5XVG5CTzFCdHdNcmRDU2JJbHQ2TmtNbmhPWfK2NUY5QktZc1F2ZU1ZYzZoWlBqYm1hNDVGWDhQZ0o1X25ORnFzbnVPWHNKSDIB6wFBVV95cUxQNEhmbUl2c2ktMmxaTHhKWHBXYmU0dkhFS0dXcDhRQ1FfTjdFenRPSDk0RmJyYakp6Wkdk>)

NIV1VzBUWFZ5VEl6VVJUSlAxQTJ4T1lwcFgwZXRqd0cwMGR6YkljZ05kSHBNWlFrVE  
9aTjhhb2xFa213MWJ0clV4bmVDTm96WGZCRlJESHVTM0FSNFdPRnhTskdnMHI5X2  
RJVHU2c1QtQ3k1YlBIYnhtZWRIa2FWNFpwcDMwOHJHdzc5T05HS3FNSm0yaVloN1  
JacVctdWpQRmtZMGs0WWxNdUE0WW5NRzRodE9JVF9v?oc=5)

摘要: Job Listings For Cybersecurity Advisors Up 11% Due To Threats Identified By Claude Mythos, GPT 5.4 Cyber NDTV Profit

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

28. IREN' s CEO Just Said 11 Words that Delivered the AI Boom a Brutal Reality Check 24/7 Wall St. | 24/7 Wall St. | 2026 05 25 22:28 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMivwFBVV95cUxOY0M5VDNDRHNobjU2dy1ScTZiNVhFR1UxT2hjaEgtMlzelZZanc0UlZPaGRXVkJSWG4wYmtpaks2eIVjSWRjNkdENVV1SG5oY2xqVVPmV28ta25UdGNpWFBGblsSUJCzkV0bzFfVmlDQ1JhbnkwcGlmVURMTWkwd1BZRlFBVkJaRjRRdEh5U0hFc3N5bnpVM2I0UFBiRm12SjFFbU5JMFZib3diU0FGUFZKLXdqcGYtZjBockFqYw?oc=5>)

摘要: IREN' s CEO Just Said 11 Words that Delivered the AI Boom a Brutal Reality Check 24/7 Wall St.

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

29. STARTRADER Bets on AI, Space, and Crypto with 39 New US Stocks and ETFs TradingView | TradingView | 2026 05 25 23:23 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMi0AFBVV95cUxOUFJRWnlxUk1FWXhnRmV5ZmlYSW9UbVRsNG1UaDhzS1dIdUphQk5wQXpQelp6QUMxMC1STnJmeGVyZUY4X3A5YWUyVHJKN2ZWam1nZklzRlR3NExMLVVta3F6M1JPMmU2MnUyWkpETXRoz1hGbl9ZWFFQYmtneGNEN291MDB3Qjd4ZW9fN05UU2xEYXZjTnR6RFA5S21vRmlpN1k5SHNDZlpxanQ2MHpOY1hCX3hfd19QsndRYkowaExudXd1RWk0WDNiQ3poYUFs?oc=5>)

摘要: STARTRADER Bets on AI, Space, and Crypto with 39 New US Stocks and ETFs TradingView

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

30. Zammo.ai scales customer AI adoption with Microsoft Azure and Microsoft Marketplace Microsoft | Microsoft | 2026 05 25 23:41 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMic0FVX3lxTE9yMINMY3BZWjVLdjdBZ0lRdkhQT0NKZ0wzcjU5LXFUeU1RXzRSOFcwejR2RmdFN0t0TFd3UHdoTVZGcGlnZy1XZnRKdE5FNvdtYXZzd0p0Qkc1Q2RlQ3c2a0tnTXZPcFVPWWJOQ1hTVm1rRk0?oc=5>)

摘要: Zammo.ai scales customer AI adoption with Microsoft Azure and Microsoft Marketplace Microsoft

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

31. Nigeria Launches Meta Backed GovGuide AI Chatbot for Government Services N

ews Ghana | News Ghana | 2026 05 26 01:04 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMipAFBVV95cUxQUmRZQmFqd0tWaC1PS3RPN1p4XzY4WGRMVlAzWHBVUlBXD1VLVFNTcUFZWVBLcUxkMnFfM3gtQnJ5WkV5YkFiVmtXdWtnYTVGQVpXRzFFRi1yOTJrQV94Suk3cWJfcGILMGFXTTNSbkptdk1RQlQ4ZjdXSko1aVNaclmcDJhak9ObTlIdmZkclh6UGtKWmVxZ05ITXBOOUdyYTV2cQ?oc=5>)

摘要: Nigeria Launches Meta Backed GovGuide AI Chatbot for Government Services News Ghana

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

32. Google disrupts AI cloud with \$5B Blackstone venture Rolling Out | Rolling Out | 2026 05 26 02:09 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMifkFVX3lxTE1CT1I3UUtwQlFIZjFZd0ltb3BTdnc3MXlQSjVOMGptdmpmNzQ3eENaQktxdk4tVy1xVkfCaVdGYTFMU2NsMHRJRuo1OUZQX1dWajMzNjFjWlRpOEd1el9xa0JtOEFwU0NPX1hxaXJHdklGdUpXT2o3M0NWVDRqQQ?oc=5>)

摘要: Google disrupts AI cloud with \$5B Blackstone venture Rolling Out

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

33. The 2021 altseason will never happen again CryptoRank | CryptoRank | 2026 05 26 03:15 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMihgFBVV95cUxQNVVVbTVnOC13ZzdiNFFrNi1NdHlva3VIQjdHbWFEdmlPOWFMMHNDUDkxRlp2cmlCRE5mclRRM2taMThPWl81VjR3WDY5UEY3X3A0aDctbzMwTlp5Sy1pSmdIVWpHS19ZeGdyRUpZSUE3dk9hQTY3clo4Z2tSSHpmVHo0YlJRQQ?oc=5>)

摘要: The 2021 altseason will never happen again CryptoRank

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

34. Humanoid Robots Reach Production Scale: Robotics Summit Opens on ROS vs. Proprietary Physical AI | Tech Times | 2026 05 26 03:31 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMi3wFBVV95cUxPNWFKQXM2MXI5bWJHqVJkdUIDMGFKLXFIV3l2UmJMYVFmSmRTNGRUNDF5ZU1waTntY1lNaEswUzVpSnU2YWpUN1RLN0EyZV9uNFI1R3lFWlctd1owNWZFeUM4MjZTeWl2djlqX18yLWhyLWdOVWF3Y2ZTOXN2RXk5TUJ6SWtzZUs4Z2J0cTZPNkjcZ1F3Q0xV243c0lWNUxPcmFHV1FGWmdLRVBPeFowZDJpYXk5QlNBSEFOZGo4aDV1ZGNDamo2UE9qQ1AtSGRGQ01QM1BTOWZ3dHBlaFcw?oc=5>)

摘要: Humanoid Robots Reach Production Scale: Robotics Summit Opens on ROS vs. Proprietary Physical AI Tech Times

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

35. 'Magnifica Humanitas' explores being human in the age of artificial intelligence OSV News | OSV News | 2026 05 26 04:37 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMipgFBVV95cUxPUklrVDQ4a1Z2dXN>)

NSFpmdGN0N1pIZzhTZXBjWmxIRkxlUV9DRm9MeE1zZU51N2lSZ0pidGRBeGVtb04yZkk2cmt0Z1RRTEhXNEFqalV6VUQzaFNTcWdWcWFpM1c5MIY5MGxQUet2TUlzbWNuVWdGVTdCODN3dHdKdUprZkdFS0JIM29sOERsYlNoUS1EckNqSVFHay1udktFdC01YWxR?oc=5)

摘要: 'Magnifica Humanitas' explores being human in the age of artificial intelligence OSV News

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

36. AI at TechInsights: April 2026 Review TechInsights | TechInsights | 2026 05 26 05:52 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMidkFVX3lxTE5vc290Njl4Z2VXMnQ2VFIWTWRyNE9GVmhxV3FTWXRpLTRNMIJNd21JQVZXU0ZLeXcwRDI5dENIZXNERDVBB2NkU0ZHMjN0aXdWUFRvR0ZlTDFWd19kM09zTVhQdHpHUF9BODk2cllod1BVYnY3blE?oc=5>)

摘要: AI at TechInsights: April 2026 Review TechInsights

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

37. Big Tech data center problem: rising energy costs and community backlash valleyvanguardonline.com | valleyvanguardonline.com | 2026 05 26 07:11 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMirgFBVV95cUxNbFpvZ1IzT1BmMmFZYVc3N05CVEhlNnBzQ0o1NVlQLVFQNVZrRFR3bW9kTjVWSkk1T0xkdThPeFZZaDVCNlBfQXVPZzhza1dRb3JkRjFTMEZpdTNVZldic04zZC1nSk9VU00xVUEyTUh5TTBRZlpDTGcyZmMtTXl6TnhzQjZCMnhaZW5kend2WHVKNDctdndGRGM4NHAzenZqRkpOSzI1NHJuS1dxEE?oc=5>)

摘要: Big Tech data center problem: rising energy costs and community backlash valleyvanguardonline.com

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

38. Morgan Stanley questions whether AI has made the US economy less responsive to market forces | Crypto Briefing | 2026 05 26 07:20 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMic0FVX3lxTE04SWt5M2NCWFRQdUE0STJ3X0pFUnFNa1Y2anMwc250SDhIaE1QQkM0UjMzcDE3T1ZBb3Nlcy0wR1Q2QjNwSWFNaEUyZ3Z1Sm5MZFFtOHptaFRUWmlwcExkN1B0SnVyM0VNbm5UcFRGRGh4S00?oc=5>)

摘要: Morgan Stanley questions whether AI has made the US economy less responsive to market forces Crypto Briefing

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

39. Wiwynn Advances Datacenter Design at Computex 2026 with High Power and Optical Interconnect | TradingView | 2026 05 26 08:30 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMi5wFBVV95cUxQOHBjdU5KNHlRaGotc3hRbXJhZ3IxRExoWnFvbDY4VFE1ODJsZWJXYXJrc05VT3ZUZ3RwY2VZRzVlTFY5eXFLRXpCUHNfZE13dWlyTExwcnBzMnVhd3dKbVRicm9WTHJNMkREcFVoR>)

TRxR0RDQ0hkNmpSU1h3YUx6ZjFkMHBoMXlrR0I1dW1NODU0bDRpMlFqZlRjdHdk  
aF9ScEx3MjVtTmNjRGtsd0M0cGlGYXdua0dfQnU3VGcxc3U5RHE2bWhOX1dFaEZHY  
VhSSDJqM3hYbHIWbkVfZllwbXRWZmdJWXc?oc=5)

摘要: Wiwynn Advances Datacenter Design at Computex 2026 with High Power and  
Optical Interconnect TradingView

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

40. RT by @NVIDIAAI: First stop during NVIDIAGTC Taipei: Meet a Claw. Our giveaw  
ay winner made it just in time, and her prize came with a surprise handoff from Jen  
sen himself. | Nitter/@NVIDIAAI | 2026 05 23 18:24 BJT | 指标 N/A (X API 不可用; 推  
断热度) | 链接 (<https://nitter.net/NVIDIAGTC/status/2058132013173866999> m)

摘要: First stop during NVIDIAGTC Taipei: Meet a Claw. Our giveaway winner made  
it just in time, and her prize came with a surprise handoff from Jensen himself. Vide  
o

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

41. RT by @NVIDIAAI: The best way to kick off NVIDIAGTC Taipei? A surprise visit fr  
om CEO Jensen Huang at the Meet a Claw event. ☑ Meet a Claw brought together Tai  
wan's developer community for an afternoon of hands on demos, tech talks from ou  
r experts and fellow developer evangelists, networking, and a personal DGX Spark gi  
veaway from Jensen to one lucky winner. Catch the excitement here ☑ | Nitter/@NV  
IDIAAI | 2026 05 23 22:18 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/NVIDIAAI/status/2058190938401366308> m)

摘要: The best way to kick off NVIDIAGTC Taipei? A surprise visit from CEO Jensen  
Huang at the Meet a Claw event. ☑ Meet a Claw brought together Taiwan's developer  
community for an afternoon of hands on demos, tech talks from our experts and fel  
low developer evangelists, networking, and a personal DGX Spark giveaway from Jen  
sen to one lucky winner. Catch the exci

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

42. BofA's Vivek Arya Sees Nvidia at \$350 as Agentic AI Drives an "Unprecedented  
" Chip Cycle | Bing News RSS | 2026 05 25 12:29 BJT | 指标 N/A (X API 不可用; 推断  
热度) | 链接 (<https://247wallst.com/investing/2026/05/25/bofas-vivek-arya-sees-nvidia-at-350-as-agentic-ai-drives-an-unprecedented-chip-cycle/>)

摘要: Bank of America's Vivek Arya walked onto CNBC with a number that sits wel  
l above consensus. His price target on NVIDIA (NASDAQ:NVDA | NVDA Price Predict  
ion) is \$350, against a stock trading around ...

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

43. Nvidia just raised its dividend by 2,400%. NVDA stock is still a bet on growth, not  
income. | Bing News RSS | 2026 05 25 14:00 BJT | 指标 N/A (X API 不可用; 推断热度  
) | 链接 (<https://www.msn.com/en-us/money/top-stocks/nvidia-just-raised-its-divide>

nd by 2 400 nvda stock is still a bet on growth not income/ar AA2414IT)

摘要: Data centers are now being described as running in "hyperdrive" in 2026, and it is easy to see why. Big cloud players and enterprises are racing to build out AI capacity, and right at the center of ...

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

44. SignalPulse The Tech Buzz | The Tech Buzz | 2026 05 25 21:58 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMimgFBVV95cUxNa05vX05zRUhVM0EzcXdkZjhpNmMxWHlEcHM2TWJiclNPeVBHVGpqVmwtRllhYi0ySVZWLWV3U2NFMG9ZWGlIZ2NUaXJYRUo0a0FSRkRwRkdDZW05aVpqVnhYdUkwekpnNmNVNHdKRjk3ZnVxVzR6cE9NTmphZUZNMdY5cFpGc0czV2Mxalp6UTljMW5lSnRnVy1n?oc=5>)

摘要: SignalPulse The Tech Buzz

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

45. The Future of Bitcoin Mining Is Bigger Than Bitcoin TheEnergyMag | TheEnergyMag | 2026 05 25 22:24 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMic0FVX3lxTE5RSGlXZU1XSUFfIOEh6LUx2UEF6WjBKMzFoZWl2RDJTMHpEWnQ5RWhjNm81OEpscTBFejAtYXBzZHh5OExzRnJpaTVUNWI5ZmRlOFBiZm9QU1ZiczlKRnZzTGFZcTJ4VUMyV1k0ZlJna3I4RE0?oc=5>)

摘要: The Future of Bitcoin Mining Is Bigger Than Bitcoin TheEnergyMag

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

## 金融全量资讯池

1. 美股期货大涨: 油价因 U.S. Iran deal hopes 下跌, 风险资产获得“能源通胀缓释”交易 | Nitter/@CNBC | 2026 05 26 06:05 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.cnbc.com/2026/05/25/stock-futures-today-live-updates.html>)

摘要: CNBC 推送 Dow futures jump 400 points, 油价因市场押注美国—伊朗协议接近而下跌。

影响: 若协议落地, AI megacap 与长久期成长股估值折现率压力下降; 若 headline 反转, 则油价和黄金可能快速回补风险溢价。

2. 油价分歧: U.S. military strikes against Iran 与和平谈判并存, Hormuz risk premium 未消失 | Nitter/@CNBC | 2026 05 26 08:47 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.cnbc.com/2026/05/26/oil-prices-today-brent-wti-iran-trump-hormuz.html>)

摘要: CNBC 报道油价 mixed, 交易员同时权衡美国军事行动、伊朗外交与 Hormuz 风险。

影响: 油价仍是通胀、Fed 路径、航空/运输/化工利润和 EM 外汇的关键变量; AI 估值也会通过利率通道受影响。

3. Bloomberg: 全球 gas market 盯住 China demand 与 weather, Hormuz closure 背景下 LNG 价格弹性上升 | Nitter/@business | 2026 05 26 07:10 BJT | 指标 N/A (X API 不

可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059049394096279891> m)

摘要: Bloomberg Business X snippet 称, 在 Strait of Hormuz 接近关闭数月的背景下, 全球天然气交易员关注中国和天气两个 wildcards。

影响: 若 LNG 价格走高, 欧洲/亚洲通胀和工业利润承压; 数据中心电力成本也会间接受影响。

4. Gold holds gains: 伊朗协议进展缓和通胀担忧, 但黄金仍保留避险 bid | Nitter/@business | 2026 05 26 07:55 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059060719442690187> m)

摘要: Bloomberg snippet 称 gold held gains, 因为美国与伊朗达成 deal/reopen Hormuz 的迹象缓和 inflation fears。

影响: 观察 gold vs oil vs DXY 的相对走势, 可判断市场是在交易通胀缓释还是地缘尾部风险。

5. Treasuries curve rally: 假期后现金交易恢复, 市场押注 U.S. Iran deal 降低通胀尾部 | Nitter/@business | 2026 05 26 08:15 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059065762053013567> m)

摘要: Bloomberg snippet 称 Treasuries rallied across the curve, 投资者对潜在美国—伊朗协议更乐观。

影响: 若长端收益率回落, AI/semicap/high duration software 估值获得支撑; 若 fiscal/term premium 主导, 反弹会受限。

6. 日本百年 cabling maker 蒸发 400 亿美元: AI infrastructure rally 出现“真实订单/估值”压力测试 | 公开 RSS / snippet | N/A | 指标 N/A (X API 不可用; 推断热度) | 链接 ()

摘要: Bloomberg snippet 称一家 141 年日本 cable firm 的 400 亿美元 selloff 暴露 AI infrastructure rally 的脆弱性。

影响: 市场可能从“AI 受益者泛化”转向筛选 backlog、margin、capex conversion 和客户集中度; AI infra beta 波动会加大。

7. Taiwan market value overtakes India: TSMC / AI semiconductor beta 改写国家股市排名 | Nitter/@business | 2026 05 26 08:35 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059070785851998585> m)

摘要: Bloomberg snippet 称台湾股市市值超过印度, 主要由 TSMC 的持续上涨推动。

影响: 资产配置层面, AI/TSMC beta 对台湾权重、EM/Asia allocation、外汇和地缘风险溢价都会有放大效应。

8. CNBC China Connection: tariffs eased, trust didn't; 中美贸易缓和不等于供应链信任恢复 | Nitter/@CNBC | 2026 05 26 07:09 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.cnbc.com/2026/05/25/cnbcs-the-china-connection-newsletter-tariffs-eased-trust-didnt.html>)

摘要: CNBC newsletter 标题强调关税缓和但信任并未恢复, 指向中国企业进入美国市场的长期摩擦。

影响: 中国科技硬件、EV、跨境电商和半导体链估值会继续带有地缘折价; AI 供应链去风险

化也会持续。

9. Indonesia bans Polymarket: 预测市场在亚洲继续遭遇 gambling/crypto 合规压力 | Nitter/@CoinDesk | 2026 05 26 05:36 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.coindesk.com/policy/2026/05/25/indonesia-blocks-polymarket-calling-prediction-market-online-gambling-in-disguise>)

摘要: CoinDesk/Nitter 称印尼将 Polymarket 归类为非法 online gambling; 印度也已限制该平台。

影响: 负面影响 prediction market 叙事与代币/平台估值; 也提醒 stablecoin/crypto apps 的合规分发是区域化问题。

10. Bitcoin / crypto tick up: US Iran peace deal odds 推动 crypto risk on 反弹 | CoinDesk RSS | 2026 05 26 00:46 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.coindesk.com/markets/2026/05/25/bitcoin-crypto-prices-tick-up-as-us-iran-peace-deal-odds-climb>)

摘要: CoinDesk 报道, 比特币和 crypto prices 因美国—伊朗和平协议概率上升而走高; 谈判涉及 Hormuz 与高浓缩铀议题。

影响: 若能源风险缓和、美元走弱, BTC/ETH/高 beta altcoins 可能继续反弹; 若谈判破裂, crypto 会跟随风险资产回撤。

11. Traders pushed bearish bets on Xiaomi to a record ahead of first quarter earnings amid concerns over rising memory costs and escalating rivalry in China's EV market [https://www.bloomberg.com/news/articles/2026-05-26/xiaomi-short-bets-hit-record-on-cost-worries-ahead-of-earnings?taid=6a14e4ded20ee6000167a996&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-26/xiaomi-short-bets-hit-record-on-cost-worries-ahead-of-earnings?taid=6a14e4ded20ee6000167a996&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 08:10 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059064499080986774> m)

摘要: Traders pushed bearish bets on Xiaomi to a record ahead of first quarter earnings amid concerns over rising memory costs and escalating rivalry in China's EV market [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

12. 今日必读 ☑特朗普称美国与伊朗和谈顺利推进 ☑教宗良十四世呼吁防止AI支配人类 ☑华尔街警告长端收益率将居高不下 获取免费中文电子报《彭博财经早茶》与音频播报, 聚焦中国与全球市场最新动向, 并有周末特别推送。 A daily Chinese language briefing and audio broadcast of what's moving markets in China and around the world. Plus, a weekend edition. [https://www.bloomberg.com/account/newsletters/china-markets?taid=6a14dba6dece610001d02cad&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/account/newsletters/china-markets?taid=6a14dba6dece610001d02cad&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 07:30 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059054599936381331> m)

摘要: 今日必读 ☑特朗普称美国与伊朗和谈顺利推进 ☑教宗良十四世呼吁防止AI支配人类 ☑

华尔街警告长端收益率将居高不下 获取免费中文电子报《彭博财经早茶》与音频播报，聚焦中国与全球市场最新动向，并有周末特别推送。 A daily Chinese language briefing and a audio broadcast of what's moving markets in China and around the world. Plus, a weekend edition. bloomberg.com/account/newsle...

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

13. Canadian dollar strengthens as investors weigh peace deal prospects <http://reut.rs/4urrqAN> <http://reut.rs/4urrqAN> | Nitter/@ReutersBiz | 2026 05 26 03:15 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/ReutersBiz/status/2058990301272838296> m)

摘要：Canadian dollar strengthens as investors weigh peace deal prospects [reut.rs/4urrqAN](http://reut.rs/4urrqAN) [reut.rs/4urrqAN](http://reut.rs/4urrqAN)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

14. Japan was overtaken by China as the world's second largest creditor nation in 2025, despite setting a fresh record for its tally of overseas assets. [https://www.bloomberg.com/news/articles/2026-05-25/japan-slips-to-world-s-no-3-creditor-behind-germany-and-china?taid=6a14e04d1e65370001d8c663&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-25/japan-slips-to-world-s-no-3-creditor-behind-germany-and-china?taid=6a14e04d1e65370001d8c663&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 07:50 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059059592835821623> m)

摘要：Japan was overtaken by China as the world's second largest creditor nation in 2025, despite setting a fresh record for its tally of overseas assets. [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

15. Commonwealth Bank of Australia CEO Matt Comyn said AI will take away jobs at businesses across the economy [https://www.bloomberg.com/news/articles/2026-05-25/top-australia-banker-flags-job-cuts-as-more-ai-tools-roll-out?taid=6a14e0d4dece610001d02cba&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-25/top-australia-banker-flags-job-cuts-as-more-ai-tools-roll-out?taid=6a14e0d4dece610001d02cba&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 07:52 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059060162812371079> m)

摘要：Commonwealth Bank of Australia CEO Matt Comyn said AI will take away jobs at businesses across the economy [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

16. Ryanair pays off final bond to leave it debt free <http://reut.rs/4dw5puS> <http://reut.rs/4dw5puS> | Nitter/@ReutersBiz | 2026 05 25 23:01 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/ReutersBiz/status/2058926421582524849> m)

摘要：Ryanair pays off final bond to leave it debt free [reut.rs/4dw5puS](http://reut.rs/4dw5puS) [reut.rs/4dw5puS](http://reut.rs/4dw5puS)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

17. Portugal flag carrier TAP's loss shrinks 63%, flags fuel price pressure ahead <http://reut.rs/4uw0VdF> | Nitter/@ReutersBiz | 2026 05 26 00:01 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/ReutersBiz/status/2058941472326459811> m)

摘要: Portugal flag carrier TAP's loss shrinks 63%, flags fuel price pressure ahead [reut.rs/4uw0VdF](http://reut.rs/4uw0VdF)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

18. REGULATION: ☒☒ Indonesia bans @Polymarket, classifying the crypto prediction market as illegal online gambling. India has also restricted the platform, making it the second major Asian market to block access. | Nitter/@CoinDesk | 2026 05 26 05:36 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CoinDesk/status/2059025939158171935> m)

摘要: REGULATION: ☒☒ Indonesia bans @Polymarket, classifying the crypto prediction market as illegal online gambling. India has also restricted the platform, making it the second major Asian market to block access.

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

19. Dow futures jump 400 points as oil tumbles on hope U.S. Iran deal is close: Live updates [https://www.cnbc.com/2026/05/25/stock-futures-today-live-updates.html?taid=6a14c7badece610001d02c25&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/25/stock-futures-today-live-updates.html?taid=6a14c7badece610001d02c25&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter) | Nitter/@CNBC | 2026 05 26 06:05 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2059033208365240679> m)

摘要: Dow futures jump 400 points as oil tumbles on hope U.S. Iran deal is close: Live updates [cnbc.com/2026/05/25/stock fu...](https://www.cnbc.com/2026/05/25/stock-fu...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

20. Two ex SoftBank fund managers are charging \$25,000 a day to teach bankers how to implement their AI plans [https://www.bloomberg.com/news/features/2026-05-25/the-ai-trainers-charging-25-000-a-day-to-push-wall-street-s-agentic-shift?taid=6a14d4dcdece610001d02c85&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/features/2026-05-25/the-ai-trainers-charging-25-000-a-day-to-push-wall-street-s-agentic-shift?taid=6a14d4dcdece610001d02c85&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 07:01 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059047309359431888> m)

摘要: Two ex SoftBank fund managers are charging \$25,000 a day to teach bankers how to implement their AI plans [bloomberg.com/news/features/...](https://www.bloomberg.com/news/features/...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

21. A \$40 billion selloff in a 141 year old Japanese cable firm has served as a reality check on the fragility of the global AI driven stock rally <https://www.bloomberg.com/news/articles/2026-05-25/japan-cablemaker-rout-exposes-cracks-in-ai-infrastructure-r>

ally?taid=6a14d5f3dece610001d02c91&utm\_campaign=trueanthem&utm\_content=business&utm\_medium=social&utm\_source=twitter | Nitter/@business | 2026 05 26 07:06 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059048480975229129> m)

摘要: A \$40 billion selloff in a 141 year old Japanese cable firm has served as a reality check on the fragility of the global AI driven stock rally [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

22. CNBC's The China Connection newsletter: Tariffs eased. Trust didn't. [https://www.cnbc.com/2026/05/25/cnbcs-the-china-connection-newsletter-tariffs-eased-trust-didnt.html?taid=6a14d6b476f92e000141fd3f&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/25/cnbcs-the-china-connection-newsletter-tariffs-eased-trust-didnt.html?taid=6a14d6b476f92e000141fd3f&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter) | Nitter/@CNBC | 2026 05 26 07:09 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2059049288278184141> m)

摘要: CNBC's The China Connection newsletter: Tariffs eased. Trust didn't. [cnbc.com/2026/05/25/cnbcs th...](https://www.cnbc.com/2026/05/25/cnbcs-th...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

23. Russian Foreign Minister Sergei Lavrov called US State Secretary Marco Rubio to advise him to evacuate US citizens and diplomats from Kyiv, according to a statement published by the Russian Foreign Ministry. <https://www.bloomberg.com/news/articles/2026-05-25/lavrov-tells-rubio-to-evacuate-us-diplomats-citizens-from-kyiv> mplnvqzc?taid=6a14dd4fdece610001d02cb0&utm\_campaign=trueanthem&utm\_content=business&utm\_medium=social&utm\_source=twitter | Nitter/@business | 2026 05 26 07:37 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059056384352702639> m)

摘要: Russian Foreign Minister Sergei Lavrov called US State Secretary Marco Rubio to advise him to evacuate US citizens and diplomats from Kyiv, according to a statement published by the Russian Foreign Ministry. [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

24. Trump pushed Saudi Arabia and Qatar to recognize Israel by joining the Abraham Accords, linking it to negotiations with Iran [https://www.bloomberg.com/news/articles/2026-05-25/trump-pushes-saudis-to-recognize-israel-via-abraham-accords-as-part-of-iran-deal?taid=6a14df02dd81f8000142617b&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-25/trump-pushes-saudis-to-recognize-israel-via-abraham-accords-as-part-of-iran-deal?taid=6a14df02dd81f8000142617b&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 07:45 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059058204940681658> m)

摘要: Trump pushed Saudi Arabia and Qatar to recognize Israel by joining the Abraham Accords, linking it to negotiations with Iran [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

25. Asia markets set to open broadly higher as oil prices slide on U.S. Iran peace hopes [https://www.cnbc.com/2026/05/26/asia-markets-today-sensex-kospi-nikkei-hang-seung-iran-us-oil.html?taid=6a14e34bdece610001d02ce9&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/26/asia-markets-today-sensex-kospi-nikkei-hang-seung-iran-us-oil.html?taid=6a14e34bdece610001d02ce9&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter) | Nitter/@CNBC | 2026 05 26 08:03 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2059062807102968221> m)

摘要：Asia markets set to open broadly higher as oil prices slide on U.S. Iran peace hopes [cnbc.com/2026/05/26/asia mar...](https://www.cnbc.com/2026/05/26/asia-mar...)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

26. US and Israeli jets struck a number of Iranian vessels in the Strait of Hormuz, local media reported, hours after President Donald Trump had suggested negotiations with Tehran over an interim deal were progressing. [https://www.bloomberg.com/news/articles/2026-05-25/trump-touts-iran-progress-while-hormuz-strike-reports-show-risk?taid=6a14e3b1dd81f8000142619f&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-25/trump-touts-iran-progress-while-hormuz-strike-reports-show-risk?taid=6a14e3b1dd81f8000142619f&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 08:05 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059063236222189584> m)

摘要：US and Israeli jets struck a number of Iranian vessels in the Strait of Hormuz, local media reported, hours after President Donald Trump had suggested negotiations with Tehran over an interim deal were progressing. [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

27. Two ex SoftBank fund managers are charging \$25,000 a day to teach bankers how to implement their AI plans. More here: <http://bloom.bg/4nWSFkw> ☒: Jose A. Alvarado Jr./Bloomberg | Nitter/@business | 2026 05 26 08:38 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059071723148804441> m)

摘要：Two ex SoftBank fund managers are charging \$25,000 a day to teach bankers how to implement their AI plans. More here: [bloom.bg/4nWSFkw](http://bloom.bg/4nWSFkw) ☒: Jose A. Alvarado Jr./Bloomberg

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

28. ASX is increasing its capital spending to upgrade critical market infrastructure as Australia's embattled exchange operator seeks to regain the confidence of regulators and stakeholders after years of technical issues [https://www.bloomberg.com/news/articles/2026-05-26/asx-ramps-up-capital-spending-to-support-technology-upgrade?taid=6a14ed131e65370001d8c6bf&utm\\_campaign=trueanthem&utm\\_content=business&utm\\_medium=social&utm\\_source=twitter](https://www.bloomberg.com/news/articles/2026-05-26/asx-ramps-up-capital-spending-to-support-technology-upgrade?taid=6a14ed131e65370001d8c6bf&utm_campaign=trueanthem&utm_content=business&utm_medium=social&utm_source=twitter) | Nitter/@business | 2026 05 26 08:45 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059>

073308809744894 m)

摘要: ASX is increasing its capital spending to upgrade critical market infrastructure as Australia's embattled exchange operator seeks to regain the confidence of regulators and stakeholders after years of technical issues [bloomberg.com/news/articles/...](https://www.bloomberg.com/news/articles/...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

29. Taiwan overtakes India in stock market value, powered mainly by a breakneck rally in the world's largest chipmaker TSMC. Read more: <http://bloom.bg/49gHb5i>  : An Rong Xu/Bloomberg | Nitter/@business | 2026 05 26 08:53 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/business/status/2059075388458799167> m)

摘要: Taiwan overtakes India in stock market value, powered mainly by a breakneck rally in the world's largest chipmaker TSMC. Read more: [bloom.bg/49gHb5i](http://bloom.bg/49gHb5i)  : An Rong Xu/Bloomberg

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

30. Berkshire Hathaway's longtime edge over S&P 500 shows signs of eroding [https://www.cnbc.com/2026/05/25/berkshire-hathaways-longtime-edge-over-sp-500-shows-signs-of-eroding.html?taid=6a145fc989c60900013f1040&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/25/berkshire-hathaways-longtime-edge-over-sp-500-shows-signs-of-eroding.html?taid=6a145fc989c60900013f1040&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter) | Nitter/@CNBC | 2026 05 25 22:42 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2058921600561369304> m)

摘要: Berkshire Hathaway's longtime edge over S&P 500 shows signs of eroding [cnbc.com/2026/05/25/berkshir...](https://www.cnbc.com/2026/05/25/berkshir...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

31. These tech stocks have seen bullish 'flag patterns' recently, says Katie Stockton [https://www.cnbc.com/2026/05/25/these-tech-stocks-have-seen-bullish-flag-patterns-recently-says-katie-stockton.html?taid=6a14610f89c60900013f1048&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/25/these-tech-stocks-have-seen-bullish-flag-patterns-recently-says-katie-stockton.html?taid=6a14610f89c60900013f1048&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter) | Nitter/@CNBC | 2026 05 25 22:47 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2058922971243147640> m)

摘要: These tech stocks have seen bullish 'flag patterns' recently, says Katie Stockton [cnbc.com/2026/05/25/these te...](https://www.cnbc.com/2026/05/25/these-te...)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

32. Oil prices mixed as U.S. military strikes against Iran cloud Middle East peace prospects [https://www.cnbc.com/2026/05/26/oil-prices-today-brent-wti-iran-trump-hormuz.html?taid=6a14edb3dece610001d02d27&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/26/oil-prices-today-brent-wti-iran-trump-hormuz.html?taid=6a14edb3dece610001d02d27&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter) | Nitter/@CNBC | 2026 05 26 08:47 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/20590>

73983501226304 m)

摘要: Oil prices mixed as U.S. military strikes against Iran cloud Middle East peace prospects [cnn.com/2026/05/26/oil pric...](https://www.cnn.com/2026/05/26/oil-prices/index.html)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

33. Pope Leo urges AI regulation and warns that some weapons are now beyond human control [https://www.cnn.com/2026/05/25/pope leo issues warnings about ai and autonomous weapons.html?taid=6a144c785d59c2000166fc6a&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnn.com/2026/05/25/pope-leo-ai-warnings/index.html) | Nitter/@CNBC | 2026 05 25 21:19 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2058900862483759606> m)

摘要: Pope Leo urges AI regulation and warns that some weapons are now beyond human control [cnn.com/2026/05/25/pope leo...](https://www.cnn.com/2026/05/25/pope-leo-ai-warnings/index.html)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

34. Trump links Abraham Accords to Iran deal [https://www.cnn.com/2026/05/25/trump links abraham accords to iran deal.html?taid=6a145d7189c60900013f102d&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnn.com/2026/05/25/trump-links-abraham-accords-to-iran-deal/index.html) | Nitter/@CNBC | 2026 05 25 22:32 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2058919086764003704> m)

摘要: Trump links Abraham Accords to Iran deal [cnn.com/2026/05/25/trump li...](https://www.cnn.com/2026/05/25/trump-links-abraham-accords-to-iran-deal/index.html)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

35. MARKETS: \$NEAR jumps 15% to \$2.75, nearly doubling in a month. The catalyst: NEAR Intents, the cross chain system that's processed \$19B in volume and generated \$32M in fees. | Nitter/@CoinDesk | 2026 05 26 02:10 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CoinDesk/status/2058974040748908838> m)

摘要: MARKETS: \$NEAR jumps 15% to \$2.75, nearly doubling in a month. The catalyst: NEAR Intents, the cross chain system that's processed \$19B in volume and generated \$32M in fees.

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

36. Huawei unveils new smartphone chips this fall as rivalry with Nvidia and Apple heats up [https://www.cnn.com/2026/05/25/huawei chip logicfolding semiconductor nvidia china.html?taid=6a13e5ef5d59c2000166f9ac&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnn.com/2026/05/25/huawei-chip-logic-folding-semiconductor-nvidia-china/index.html) | Nitter/@CNBC | 2026 05 25 14:02 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2058790766013472784> m)

摘要: Huawei unveils new smartphone chips this fall as rivalry with Nvidia and Apple heats up [cnn.com/2026/05/25/huawei c...](https://www.cnn.com/2026/05/25/huawei-chip-logic-folding-semiconductor-nvidia-china/index.html)

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

37. Invest in stocks powered by AI spending surge as S&P 500 earnings beat expectat

ions eciks.org | eciks.org | 2026 05 25 23:03 BJT | 指标 N/A (X API 不可用; 推断热度)  
| 链接 (<https://news.google.com/rss/articles/CBMirgFBVV95cUxOMWlDVG54UTdBNlFWQXlpLTetQ1c5U3lZQ1pSMUfiempCSXJSZE81bjh4Y2V4NUdMZVVMc2s4SVpfd1RfVEJ1aC0tdlF3OGJCNTNvNzJDQjhhTEp4NnVzNG1zVGZhrHNndGVNS3cxenlGQnJEb1VlVHJWNmZ3NFp2MUZuS3NZSjVMcXZna09rbGx0QjUwVWkwTHNVZlc3cExlR1RXQXFLVjFBcXVpQmc?oc=5>)

摘要: Invest in stocks powered by AI spending surge as S&P 500 earnings beat expectations eciks.org

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

38. STARTRADER Bets on AI, Space, and Crypto with 39 New US Stocks and ETFs TradingView | TradingView | 2026 05 25 23:23 BJT | 指标 N/A (X API 不可用; 推断热度)  
| 链接 (<https://news.google.com/rss/articles/CBMi0AFBVV95cUxOUFJRWnlxUk1FWXhnRmV5ZmlYSW9UbVRsNG1UaDhzS1dIdUphQk5wQXpQelp6QUMxMC1STnJmeGVyZUY4X3A5YWUyVHJKN2ZWam1nZklzRlR3NEExMLVVTa3F6M1JPMmU2MnUyWkpETXRoz1hGbl9ZWFFQYmtneGNEN291MDB3Qjd4ZW9fN05UU2xEYXZjTnR6RFA5S21vRmlpN1k5SHNDZlpxanQ2MHPoY1hCX3hfd19QsndRYkowaExudXd1RWk0WDNiQ3poYUFs?oc=5>)

摘要: STARTRADER Bets on AI, Space, and Crypto with 39 New US Stocks and ETFs TradingView

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

39. Rising Treasury yields tied to Iran conflict could add billions to US interest payments: FT | Crypto Briefing | 2026 05 26 07:20 BJT | 指标 N/A (X API 不可用; 推断热度)  
| 链接 (<https://news.google.com/rss/articles/CBMihAFBVV95cUxNdU5KSVVMWlNSNUdWdzRmQno3SWdHYXR6eTBwUWQ2TzBodWVxVndtMlJES2VKNUVNBkpMNmNOa0VCMU5FVWxkT1pVMk9kU1ljNkF6NnI4N3NjBzIOTtgxVHV3b2NPd0RmYjhwTm1ubWdvdDRXZVREUmZFRHVWTFdlYXJsXk?oc=5>)

摘要: Rising Treasury yields tied to Iran conflict could add billions to US interest payments: FT Crypto Briefing

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

40. OPINION: @BitMNR's Tom Lee says the coming wave of @SpaceX, @OpenAI and @Anthropic IPOs could unleash 5 6% of the S&P 500's market cap in new supply, but argues under allocated family offices and pensions have enough dry powder to absorb it. | Nitter/@CoinDesk | 2026 05 24 21:24 BJT | 指标 N/A (X API 不可用; 推断热度)  
| 链接 (<https://nitter.net/CoinDesk/status/2058539515203973269 m>)

摘要: OPINION: @BitMNR 's Tom Lee says the coming wave of @SpaceX , @OpenAI and @Anthropic IPOs could unleash 5 6% of the S&P 500's market cap in new supply, but argues under allocated family offices and pensions have enough dry powder to absorb it.

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

41. German industry keeps cutting jobs despite first sales rise in three years, EY says  
<http://reut.rs/42VR0Sx> <http://reut.rs/42VR0Sx> | Nitter/@ReutersBiz | 2026 05 25 13:00 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/ReutersBiz/status/2058775249416487365> m)

摘要：German industry keeps cutting jobs despite first sales rise in three years, EY says  
[reut.rs/42VR0Sx](http://reut.rs/42VR0Sx) [reut.rs/42VR0Sx](http://reut.rs/42VR0Sx)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

42. European stocks expected to open higher as U.S. Iran talks continue [https://www.cnbc.com/2026/05/25/european-stocks-us-iran-talks-continue-markets-oil.html?taid=6a13e6705d59c2000166f9b0&utm\\_campaign=trueanthem&utm\\_content=main&utm\\_medium=social&utm\\_source=twitter](https://www.cnbc.com/2026/05/25/european-stocks-us-iran-talks-continue-markets-oil.html?taid=6a13e6705d59c2000166f9b0&utm_campaign=trueanthem&utm_content=main&utm_medium=social&utm_source=twitter) | Nitter/@CNBC | 2026 05 25 14:04 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/CNBC/status/2058791305065439462> m)

摘要：European stocks expected to open higher as U.S. Iran talks continue [cnbc.com/2026/05/25/european...](https://www.cnbc.com/2026/05/25/european...)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

43. German industry keeps cutting jobs despite first sales rise in three years, EY says  
<http://reut.rs/42UyFoQ> <http://reut.rs/42UyFoQ> | Nitter/@ReutersBiz | 2026 05 25 17:15 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://nitter.net/ReutersBiz/status/2058839294022746156> m)

摘要：German industry keeps cutting jobs despite first sales rise in three years, EY says  
[reut.rs/42UyFoQ](http://reut.rs/42UyFoQ) [reut.rs/42UyFoQ](http://reut.rs/42UyFoQ)

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

44. Why South Africa fears losing US trade deal worth billions as Trump era tariffs slash exports | Business Insider Africa | 2026 05 25 22:01 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://news.google.com/rss/articles/CBMi2gFBVV95cUxNUTBxVFhOT3RxZXJlc2ZlWEFfV1MwbWI3ZFdfaV9IbldPZ3ZoZ3pJUnprYUtoeWt1RnRLREVLcHBjek9zTkp5X19mYkdfZlo0Sjgtbk1SjZ1bWEtNTBOU3drUEJkTkjVTUZ1cVhFTnRLa1VBSzFFTDdmREJFZlM2NWtfMGYySkxIb1NQRkMtZVJwblU3STNGd1N2SDhERXZlNExTOERKRk9LX2RWNNf6NllxSE5RdS1pdGhCdEdlMy1sYWtxeTNiaW9Cdko5SzdEQkE5ZFRvM3lmQQ?oc=5>)

摘要：Why South Africa fears losing US trade deal worth billions as Trump era tariffs slash exports Business Insider Africa

影响：作为公开 RSS/X snippet 补充信号，需结合原文和市场价格二次验证。

45. Buterin says Ethereum Foundation will shrink, sell less ETH, and focus on 'CROPS' | CoinDesk RSS | 2026 05 25 23:51 BJT | 指标 N/A (X API 不可用; 推断热度) | 链接 (<https://www.coindesk.com/web3/2026/05/25/buterin-says-ethereum-foundation-will>

shrink sell less eth and focus on crops)

摘要: Buterin's influence in the EF will decrease as the board expands. He framed the EF as "one node, with a defined purpose," not the center of Ethereum.

影响: 作为公开 RSS/X snippet 补充信号, 需结合原文和市场价格二次验证。

风险与噪声

X API 不可用, 互动指标全部为 N/A; 热度排序基于来源权威性、跨源出现、时效性和战略影响推断。

web search/web extract 后端返回 api.tavily.com HTTP 432; 本期改用公开 RSS/网页/Nitter snippet, 部分 Google News wrapper 未能解析到 canonical publisher URL。

若来源只有二级媒体 snippet (例如部分 Notion/Codex/guardrail 报道), 已在不确定性中标注, 不能等同官方发布。

中东/油价/美债/股指期货 headline 变化很快, 本报告仅覆盖截至 2026 05 26 09:01 BJT 的公开信号。

部分 X/Nitter 内容是转发或摘要, 不代表完整研究/财报/政策文件。

下一步 Watchlist

U.S. Iran / Hormuz: Trump、Rubio、伊朗谈判代表、OPEC/IEA、Brent/WTI、油轮/保险费率。

Rates: UST 10Y/30Y、breakevens、DXY、gold, 确认“能源通胀缓释”是否延续。

AI infra: NVIDIA、TSMC、Vertiv、datacenter REITs、光互联/电缆/电网设备, 区分订单兑现与估值泡沫。

AI agents: Google DeepMind AlphaProof Nexus paper 细读、Notion agent workspace 官方文档、OpenAI Codex mobile release notes。

AI safety/governance: Anthropic Chris Olah remarks、coding agent sandbox/permissions、企业 adoption 的安全 gate。

Crypto/regulation: Polymarket 亚洲封禁进展、BTC/ETH ETF flow、stablecoin / prediction market 法规。

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