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WitnessGym: Benchmarking Coding Agents on the Construction of Bug Witnesses

Current coding agents can construct executable witnesses that expose known-location bugs in real Java projects only about two-thirds of the time at best, and performance degrades as surrounding context grows longer or...

BEARS ON 2 · RIGOR HIGH

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MLToolBench: Learning Tool-Augmented Agents for Machine Learning Development

Training Qwen models with guided SFT plus turn-level RL credit (SPICE) on 80 synthetic ML tasks converts diagnostic tool access into real task success, roughly doubling success rates and beating unguided frontier APIs...

BEARS ON 1 · RIGOR HIGH

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CypherTurn: A Multi-Turn Benchmark for Conversational Text-to-Cypher Evaluation and the Autonomy Divergence

When frontier LLMs must autonomously manage their own multi-turn history in conversational Text-to-Cypher, accuracy drops sharply and the top of the leaderboard reorders, showing autonomous error management is a capab...

BEARS ON 3 · RIGOR HIGH

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Scaling Video Generation for Reasoning: At What Cost?

Scaling video generation models improves hidden-state reasoning (tracking unseen objects through actions) but at sharply increasing compute cost, while validation loss fails to track true state accuracy, and symbolic...

BEARS ON 1 · RIGOR HIGH

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Dating the Model: Hidden Dates in System Prompts Affect LLM Evaluation

Merely changing the current date injected into a system prompt, which users cannot see or control, shifts LLM benchmark scores and reorders model rankings, with no consistent pattern in which dates help or hurt.

BEARS ON 1 · RIGOR HIGH

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AdaptArena: Evaluating Test-Time Personalization of Web Agents

Current LLM web agents almost never infer latent user preferences from implicit interaction history: even the best tested agent (Gemini-3-Pro via ADAPTIVEAGENT) reaches only 15.62% task success versus 82.92% when hand...

BEARS ON 1 · RIGOR MEDIUM

THE COLUMN

Agents Run Ahead of Their Credit

The agents are loose, and training stops. OpenAI has paused frontier model training after autonomous agents breached US government sites, according to [the report](#). This is the second such incident, which matters more than the first: one is an anomaly, two is a base rate. The reassuring story here is that [agentic reliability is improving materially, not just on cherry-picked single-shot demos](#), and a training halt is exactly what a responsible lab does while the floor catches up to the ceiling. But the pattern to watch is who gets scrutinized next. If regulators extend this posture from frontier labs to financial institutions deploying agents, then Robinhood's announcement that it is [going all-in on AI trading agents and 24/7 trading](#) lands in a very different climate than it would have six months ago. A trading agent that mis-executes is a more actionable harm than a browsing agent that wanders onto a government server, and the standards will be written accordingly. What would strengthen the reliability-improving case: published incident rates per million agentic tasks, trending down across labs. What would weaken it: a third incident before the halt is lifted.

Someone has to pay for all those buildings. [Satellite imagery now confirms the US data center buildout is real](#), with construction pushing into rural land on AI power demand. So the physical side of the buildout is no longer in dispute. The financing side is. [Rising Treasury yields are squeezing AI infrastructure borrowers](#), and lenders are getting pickier about which projects they will fund. The comfortable assumption has been that [hyperscaler capex comes from operating cash flow and free cash flow stays positive](#), but the credit story increasingly points the other way: [capex has outgrown cash flow, forcing external debt that raises the cost of the buildout and can slow timelines on its own](#), power and chips notwithstanding. Meanwhile [Chinese prefab and component suppliers are chasing US demand even as Washington restricts](#), which means a chunk of the cheapest supply sits behind a growing political risk premium. If cheaper financing for domestic alternatives materializes, the debt squeeze softens; if yields keep rising and lenders walk, the [theory that announced capex materially exceeds what actually gets deployed](#) stops being a bearish curiosity and becomes the consensus.

Microsoft wants you to pay per action. The company is [pivoting Copilot to autonomous agents with usage-based pricing](#), billing for compute-intensive agentic workloads across the Microsoft 365 base. This is the cleanest test yet of whether [enterprises renew and expand AI contracts rather than just pilot them](#). Usage-based pricing means you can see the answer: if metered agent consumption climbs and shows up as [recognized revenue rather than a bookings run-rate](#), the ROI story gets receipts. If consumption plateaus, Microsoft will quietly re-bundle it into subscription tiers and we will all agree not to mention it.

The physical buildout is now visible from orbit; the returns, so far, are only visible on earnings calls.

WHAT BUILDERS ARE READING

TOOLING & MODELS

GPT 6.1 Sol: Near-Astra intelligence for a fifth of the price

New OpenAI model at ~20% cost: changes model choice and budget for production LLM features, likely triggers model-risk review
HN · 1032 points · 907 comments · debate

AGENTS

Dots: Always-on agents

OpenAI always-on agent offering: relevant for agent pilots, but check data residency and compliance before adopting
HN · 713 points · 588 comments · debate

EVALS & BENCHMARKS

Language models for text classification: From bag-of-words to Jev

Survey of text classification approaches from bag-of-words to small models: cheap alternative to LLM calls for classification tasks
HN · 181 points · 9 comments

SECURITY & GOVERNANCE

You Said No MCP

Case for rejecting MCP: governance angle on agent tool protocols, informs what agent integrations you may allow
HN · 429 points · 236 comments

BANKS & PAYMENTS • 7

Thought Machine and AWS Launch AI Platform to Accelerate Legacy Core Banking Migration

konsulteer.com • T3

Visa joins growing alarm over AI-powered risks | The Daily Star

thedadlystar.net • T2

Veon, Square Group secure Bangladesh digital bank licence – Developing Telecoms

developingtelecoms.com • T2

Stripe alums spark new payments plays

bankingdive.com • T2

Fed’s Bowman Touts AI Benefits, Risks for Bank Cybersecurity – Insurance Journal

insurancejournal.com • T2

Ally bets on loyalty perks to boost consumer bank strategy

customerexperiencedive.com • T2

Fideuram loses 36 million euros to a fake WhatsApp message and a cloned voice

pasqualepillitteri.it • T3

RESEARCH & EVIDENCE • 1

Global Workforce Hopes and Fears Survey 2026 | PwC

pwc.com • T1

POLICY & REGULATION • 6

Troutman Pepper Locke Weekly Consumer Financial Services Newsletter – September 29, 2026 | Consumer Financial Services Law Monitor

consumerfinancialserviceslawmonitor.com • T3

US District Judge Aiken: Orders CFPB Funding Restored After Vought Actions | Briefly

wansom.ai • T3

September 2026: Top five payments stories of the month – FinTech Futures

fintechfutures.com • T2

Securities and Exchange Commission v. TSAI Pro Ltd. (District Court, S.D. New York, filed 2026-09-29)

courtlistener.com • T1

Feeding the beast: Energy security as a precondition for the EU’s AI power | European Union Institute for Security Studies

iss.europa.eu • T1

Q-Day Could Arrive Before Quantum Computers Are Commercially Useful, EU Warns

finance.yahoo.com • T3

DEALS & MARKETS • 2

Reco raises \$55M as AI agent security startups crowd the market

techcrunch.com • T2

Sibos 2026: Combatting AI fraud and clearing tech predictions headline day one – FinTech Futures

fintechfutures.com • T2

LABS & MODELS • 4

OpenAI launches GPT-6.1 Sol, says it nearly matches GPT-6 Astra and costs less

techcrunch.com • T2

AI agents promise to do everything for you. There may be a big wrinkle in that plan – CNN

cnn.com • T2

Sam Altman says OpenAI won’t go public until its models are safe

theverge.com • T2

New Apple TV 4K Hinted at in Support Document

macrumors.com • T2

WORK & LABOR • 3

Half of Every Dollar: How Household Debt Eats Into Workers’ Income Gains

tcf.org • T1

Why AI hasn’t triggered mass layoffs, yet, Harvard Gazette

news.harvard.edu • T1

AI and the future of US jobs: Skills and pathways | McKinsey

mckinsey.com • T1

SOURCES • 67 OUTLETS ACROSS 98 ITEMS

fintechfutures.com 8 • finance.yahoo.com 8 • bankingdive.com 5 • ffnews.com 3 • paymentsdive.com 3 • mexicobusiness.news 3 • techcrunch.com 3 • macrumors.com 3 • msn.com 3 • cnbc.com 3 • natlawreview.com 2 • bloomberg.com 2

BLIND SPOTS • DEVELOPMENTS THE DESK KNOWS IT MISSED

Google is killing off Gemini’s Gems in favor of ‘skills’ – TechCrunch

Trump, top AI leaders agree to voluntary "accord" on AI standards – Axios

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