



Morning Intel Report

January 27, 2026 — New Bookmarks Analysis

TL;DR — Top 3 Insights

- 1. Kimi K2.5 is a game-changer** — Open-source model matching Claude Opus 4.5 at 8x lower cost. Agent Swarm feature for parallel task execution. HuggingFace
- 2. Dario Amodei's "5-year window"** — AI will create massive inequality. Need to establish yourself NOW or become a "serf." Export controls still matter despite DeepSeek.
- 3. \$40M Polymarket arbitrage** — Academic paper reveals systematic arb opportunities in prediction markets. Combinatorial + rebalancing exploits.

New Bookmarks Analyzed (5)

📦 @Kimi_Moonshot — Kimi K2.5 Announcement

Posted: 10 hours ago | **Engagement:** 459 replies, 1.8K reposts, 8.2K likes, 2M views

Content: “Meet Kimi K2.5, Open-Source Visual Agentic Intelligence”

- Global SOTA on Agentic Benchmarks: HLE full set (50.2%), BrowseComp (74.9%)
- SWE-bench Verified: 76.8%
- Native multimodal (vision + language)

Key Features:

- 1T total params, 32B activated (MoE architecture)
- 256K context length
- **Agent Swarm:** Decomposes complex tasks into parallel sub-tasks executed by domain-specific agents

Benchmark Comparison:

Benchmark	Kimi K2.5	GPT-5.2	Claude 4.5 Opus
SWE-bench Verified	76.8%	80.0%	80.9%
BrowseComp	74.9%	57.8%	59.2%
MMMU-Pro	78.5%	79.5%	74.0%

Category: 📦 IMPLEMENT — Test this for coding tasks **Importance:** ★★★★★ (5/5)

🔥 @0xkyle — “5-Year Window” Thread

Posted: 9 hours ago | **Engagement:** 221 replies, 377 reposts, 4.1K likes, 323K views

Content: “Reading what the CEO of Anthropic wrote, it is more clear than ever you basically have less than a 5 year window to hyper-gamble your way into elite status or end up a serf for life. We’re in the Endgame now.”

Referenced Essay: Dario Amodei — “On DeepSeek and Export Controls”

Key Points from Dario’s Essay:

- Algorithmic progress is 4x/year (accelerating)
- DeepSeek doesn’t undermine export controls — makes them MORE important
- Scaling laws + curve shifting mean chips still matter
- “The value of having a more intelligent system is so high”

Category: 🔥 TRENDING — Mindset piece, no direct action **Importance:** ★★★★★ (4/5)

@mvanhorn — /last30days Claude Code Skill

Posted: Jan 25 | **Engagement:** 77 replies, 152 reposts, 2K likes, 391K views

Content: “Just shipped /last30days. A Claude Code skill that scans the last 30 days on Reddit, X, and the web for any topic and returns prompt patterns + new releases + workflows that work right now.”

Features:

- Scans Reddit, X, and web
- Returns: prompt patterns, new releases, workflows
- “Last 30 days of research. 30 seconds of work.”
- Includes 1:42 demo video

Note: GitHub link returned 404 — may be private or renamed.

Category:  REFINE — Similar to what we’re building **Importance:**  (4/5)

@bored2boar — \$40M Polymarket Arbitrage

Posted: Jan 26 | **Engagement:** High (bookmarked)

Content: “Leaked \$40M in Polymarket arbitrage money. Combinatorial arb, rebalancing exploits, single-condition edges.”

Paper: arxiv.org/abs/2508.03474

Key Findings:

- Two types of arbitrage:
 - **Market Rebalancing Arbitrage** — within single market/condition
 - **Combinatorial Arbitrage** — across multiple markets
- \$40 million USD profit extracted by sophisticated users
- Challenge: $O(2^{(n+m)})$ comparisons for naive analysis
- Solution: Heuristic-driven reduction (timeliness, topical similarity)

Category:  RESOURCE — Interesting for trading/prediction markets **Importance:**  (3/5)

@itsPaulAi — Kimi K2.5 Commentary

Posted: 6 hours ago | **Engagement:** 54 replies, 79 reposts, 1K likes

Content: “That’s just insane. Kimi K2.5 (which is 100% open source) is as good as Claude Opus 4.5 and GPT-5.2... And even beats them in key benchmarks”

- 8x cheaper than Opus 4.5
- Weights & code available on Hugging Face
- Multimodal with image, video, etc.

Category:  NEWS — Amplifies Kimi announcement **Importance:**  (3/5)

Action Items

- ❑ **Test Kimi K2.5** — Download from HuggingFace, benchmark against Claude for coding tasks
- ❑ **Build /last30days equivalent** — Research aggregation skill using browser-use + web_fetch
- ❑ **Read full Dario essay** — Strategic context for AI development timeline
- ❑ **Review Polymarket paper** — Potential automation opportunity if interested in prediction markets