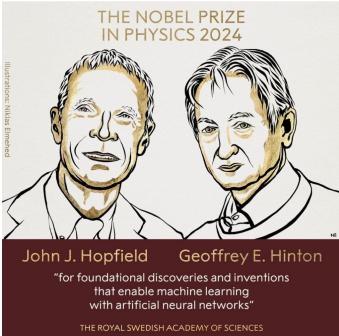


DOTE 6635: Artificial Intelligence for Business Research

What's New in AI

Renyu (Philip) Zhang

1



THE NOBEL PRIZE IN PHYSICS 2024

John J. Hopfield **Geoffrey E. Hinton**
"for foundational discoveries and inventions that enable machine learning with artificial neural networks"

THE ROYAL SWEDISH ACADEMY OF SCIENCES

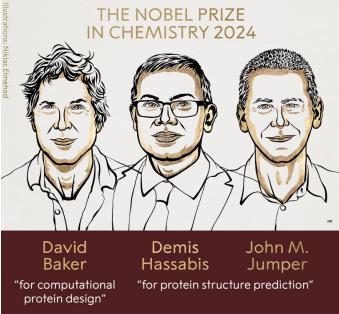
AI: Future of Human Civilization

华尔街见闻 首页 资讯 快讯 行情 日历 APP | VIP会员 大师课 生活家

763
收藏
分享
评论

OpenAI完成最新一轮66亿美元融资 警告投资者不准支持马斯克xAI等劲敌
赵雨荷 10-03 00:07

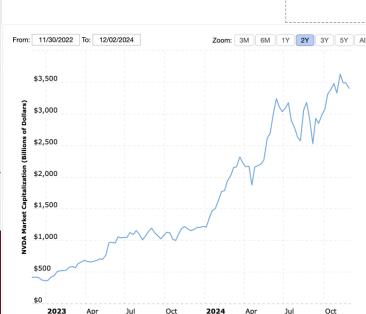
摘要：
本轮融资也是史上规模最大的私人投资之一，由Thrive Capital领投，参与者还包括微软、英伟达、软银等，其中微软投资约7.5亿美元。本轮融资过后，OpenAI的估值达到1570亿美元，跻身全球前三大初创公司的行列。同时，OpenAI希望与投资者达成独家协议，防止马斯克的xAI和Anthropic等竞争对手获得战略合作机会和资本支持。



THE NOBEL PRIZE IN CHEMISTRY 2024

David Baker **Demis Hassabis** **John M. Jumper**
"for computational protein design"

THE ROYAL SWEDISH ACADEMY OF SCIENCES



From: 11/30/2022 To: 12/02/2024
Zoom: 3M 6M 1Y 2Y 3Y 5Y All

NYSE Market Capitalization (Billions of Dollars)

Date	Capitalization (Billions of Dollars)
2023-01-01	~\$500
2023-07-01	~\$1,000
2023-12-31	~\$1,500
2024-01-01	~\$2,000
2024-04-01	~\$2,500
2024-07-01	~\$3,000
2024-10-01	~\$3,500

TechCrunch **Trump considers naming an 'AI czar'**

Kyle Wiggers Wed, November 27, 2024 at 1:59 PM PST • 1 min read

Incoming president Donald Trump is considering naming an "AI czar" in the White House, Axios reports.

Should Trump appoint such a policy person, they'd be charged with helping to coordinate federal regulation and governmental use of AI. Importantly, an AI czar wouldn't require Senate confirmation, Axios notes — allowing them to get to work on the administration's goals faster.

2

This Week in AI

The page contains several data visualizations:

- A bar chart comparing accuracy/percentile (%) across different benchmarks for DeepSeek-R1, OpenAI-o1-1217, DeepSeek-R1-32B, OpenAI-o1-mini, and DeepSeek-V3.
- A bar chart showing API prices for input and output tokens.
- A bar chart showing o1类推理模型输入输出价格 (元/1M Tokens) for DeepSeek-R1, o1-mini, o1-preview, and o1.
- A social media feed with posts from users hanxiao and My English ceng ceng up.
- A summary section about EpochAI's involvement in the Research Math benchmark.

https://github.com/deepseek-ai/DeepSeek-R1/blob/main/DeepSeek_R1.pdf

3

What's New (Feb 4/2025-1)

AI EFFECT

Nvidia sheds almost \$600 billion in market cap, biggest one-day loss in U.S. history

PUBLISHED MON, JAN 27 2025 4:08 PM EST | UPDATED MON, JAN 27 2025 5:26 PM EST

JOSH HAWLEY
U.S. SENATOR FOR MISSOURI

Home About How Can I Help News Contact

Hawley Introduces Legislation to Decouple American AI Development from Communist China

Wednesday, January 29, 2025

United States World / United States & Canada

DeepSeek tech wipeout erases more than \$1 trillion in market cap as AI panic grips Wall Street

Jennifer Sto - Jan 28, 2025, 5:22 AM GMT+8

SHARE f X in e

DeepSeek became the most downloaded app on Apple's App Store in the US on Monday. VCG/VCG via Getty Images

Microsoft, OpenAI investigate China's DeepSeek over data breach

Donald Trump's AI tsar has claimed there's 'substantial evidence' that DeepSeek leaned on OpenAI's models to develop its own technology

Reading Time: 2 minutes

Artificial intelligence Tech / Tech War

Tech war: US firms embrace DeepSeek's AI model despite scrutiny

From Nvidia to Microsoft and Amazon, US companies have rushed to adopt the Chinese start-up's R1 model

Reading Time: 2 minutes

Why you can trust SCMP

真香

4

What's New (Feb/4/2025-2)

DeepSeek-R1 is like the Watt Steam Engine and Ford Model T in the age of AI!

如何评价DeepSeek等大模型在中科院物理所理论竞赛中的表现？

更重要的是，Deepseek 在一定程度上打破了学术垄断，促进了学术界的智能平权。因为学术界的现状是，一般背景的学生和研究者没人指导，缺有价值的想法，更缺手把手的指导，科研卡住了也找不到人帮忙，只能自己死磕，磕不出来就等着延毕或 GG。即使是大佬组的，好 idea 一定能轮得到你？大佬能天天手把手教你推公式？反正就是你自己太菜也怨不得别人。而且科研很多时候其实就差临行的一句话，告诉你应该用某某方法解决，考虑 XXX，不告诉你，你自己在文献堆里翻几个月都还不确定找得到找不到。要是你需要的是某门现代数学，你望着艰深的符号，如果不是确定一定能解决自己的问题，心里早就打退堂鼓了。但你都不会，拿头确定？大佬的价值就在于此，他会凭丰富的经验给你一个确定性。这样你就能走下去。现在 Deepseek 当然达不到真正的大佬的程度，但超越一些不甚合格的导师还是绰绰有余，而且它能手把手教你。顶尖研究组可能看不上 Deepseek 给的 idea 和指导，毕竟 SOTA 只是小圈子里的知识，AI 不一定知道。但对于广大学术底层，这可就太有用了，这玩意简直就是开挂，效率一下提升一个数量级也不是没可能。况且，牛组的人真的就是靠智商吗？恐怕内部信息才是真正的护城河。Deepseek 虽然不能完全消除你的护城河，但会降低其他复现的时间成本。普通组在有了 Deepseek 的加持下，是有希望做出之前只有牛组才能做出的工作的。

那这些意味着什么呢？

没错，学术生产的手工作坊模式^{*}要被撼动了。

<https://www.zhihu.com/question/10879827313/answer/89959861140>

DeepSeek 登顶苹果美国区免费 APP 下载排行榜，与 ChatGPT 相比...

3，最大的影响，在于用很低的成本将一个能力非常强的模型开源到本地，在政府应用尤其是安全方面的应用中，在数据比较敏感的企业内部应用中，已经产生了较大潜在影响，受冲击最大的是 kimi、qwen 等希望做服务和应用的企业。企业内部的大模型应用，以前大部分都是说着玩的，各种条条框框，使得企业对数据上传到人工智能企业中非常警惕。目前的 kimi、qwen、讯飞等模型要么对用户免费或者低价，要么开源免费，其真正的目的就是要吸引企业和政府来购买他们的微调服务，他们帮政府或者企业微调一个本地的模型，在这个阶段收费。而这个阶段能够收费的逻辑之所以成立，建立在“本地模型不微调能力很差”、“知识库很难建”、“微调算力需求特别大自己实现不了”等现实逻辑上，导致许多企业和政府部门在这一阶段就已经知难而退了——要建立一个内部大模型我不仅要买算力显卡还要你来给我微调花那么多钱，那么我不做了还不行吗——但是 Deepseek 打破了这一点，r1 在能力上的本质提升使得“不微调就能用得很不错”“用 r1 的能力来弥补简陋的知识库”成为可能，于是他们就不需要购买服务，只需要购买算力就可以了。在这个过程中，大模型的应用会更广泛，更为原子化，算力的需求会成倍增长，而非下降，更多的人和企业将会加入到“人人都有自己的应用”的创新中，产生新的可能。

<https://www.zhihu.com/question/10669048245/answer/87990392650>

5

Even More Shockingly.....

OpenAI o3 Deep Research could directly produce:

Revisiting the McKinley Tariff of 1890 through the Lens of Modern Trade Theory

[o3 Deep Research]^{*}

Abstract

This paper was written with a one-shot prompt (from Kevin Bryan) on o3 Deep Research, no iteration, 10 minutes of thinking. The Tariff Act of 1890, better known as the McKinley Tariff, was a pivotal episode in U.S. trade policy, dramatically raising import duties to near-record levels. This paper provides an analysis of the McKinley Tariff by integrating historical evidence with insights from modern international trade theory. We revisit the economic and political debates of the 1890s using contemporary trade models—including models of heterogeneous firms (Meltz, 2003), Ricardian comparative advantage in general equilibrium (Eaton and Kortum, 2002), and other new trade theory advances—to re-evaluate the tariff's impacts. Historical data on trade flows, tariff rates, and industry output are analyzed alongside contemporary accounts to assess the short- and long-run effects of the tariff. We find that while the McKinley Tariff accelerated the development of certain industries (notably tinplate production) and was implemented in an era of changing comparative advantage for the United States, its overall welfare effects were mixed and likely negative when evaluated with modern trade metrics. The tariff's protective gains to manufacturers came at the cost of higher prices for consumers and implicit burdens on agricultural exporters. However, consistent with modern trade models, the United States' large market power means some tariff incidence was borne by foreign exporters. The paper concludes by drawing parallels between the McKinley Tariff episode and contemporary trade policy tensions, including recent U.S.-China tariff disputes and debates over protectionism in the global trading system.

<https://kevinbryanecon.com/o3McKinley.pdf>

Information Frictions and Innovation: A Formal Theory

[o3 Deep Research]^{*}

February 2, 2025

Abstract

This paper was written with a one-shot prompt (from Kevin Bryan) on o3 Deep Research, no iteration, 10 minutes of thinking. This paper develops a formal economic theory exploring how *information frictions* impact innovation, extending beyond the usual focus on incentive problems. We present a model of innovation in which the production of new ideas builds on previous innovations, but knowledge about these prior innovations is distributed across many agents. In this environment, classical welfare theorems break down: key inputs into innovation (knowledge) are unpriced and information is not optimally aggregated, leading to market failures. We formally compare several mechanisms—patents, prizes, advance market commitments (AMCs), and others—in their ability to overcome these information frictions. We derive propositions showing how each mechanism influences the aggregation of dispersed knowledge and the efficiency of innovation, providing rigorous proofs. Our results highlight that beyond providing incentives, innovation institutions serve a critical role in coordinating distributed information. The analysis yields insights into the design of innovation policy when knowledge is decentralized.

<https://kevinbryanecon.com/o3InnovationTheory.pdf>

6

What's New (Feb/4/2025-3)

18. Journal of Operations Management (JOM)

- (1) 运营界的“效率魔人”：研究如何让员工996还心怀感恩？JOM会给你发奖杯。
- (2) “优化一切，包括人生”：JOM的编辑可能连早餐麦片都要按算法排列。
- (3) 审稿人的隐藏人设：白天审论文，晚上在淘宝帮人优化购物车。
- (4) 投稿建议：找个效率问题，跑个优化模型，最后用一篇“效率至上”论文征服审稿人。

19. Manufacturing & Service Operations Management (MSOM)

- (1) 运营界的“技术宅”：研究如何用AI让咖啡机不洒奶泡？MSOM会为你开专题。
- (2) “模型越复杂，审稿人越嗨”：简单问题复杂化是MSOM的快乐源泉。
- (3) 审稿人的日常：一边骂你的模型不实用，一边偷偷用在自家车库管理上。
- (4) 投稿建议：找个技术问题，跑个复杂模型，最后用一篇“极客风”论文打动审稿人。

20. Production and Operations Management (POM)

- (1) 运营界的“全能卷王”：从供应链到星巴克排队，没有POM不敢管的闲事。
- (2) “数据要多，故事要野”：在这里，库存管理能扯上宇宙膨胀理论才管窥。

21. Journal of International Business Studies (JIBS)

- (1) 国际商务的“文化大使”：研究跨国公司的编辑，可能连自己护照都找不着。
- (2) “全球化是个筐，啥都往里装”：在这里，研究本地企业就像在肯德基点麦当劳——不合规矩。
- (3) 审稿人的灵魂提问：“你这研究，能解释为什么美国人觉得皮蛋是恶魔食物吗？”
- (4) 投稿建议：找个全球化问题，凑够跨文化数据，最后用一篇“文化风”论文打动审稿人。

22. Management Science (MS)

- (1) 管理学的“瑞士军刀”：从供应链到员工摸鱼，MS都能用数学模型管一管。
- (2) “生活可以乱，模型不能糙”：MS的编辑可能用优化算法决定今天穿哪只袜子。
- (3) 审稿人的执念：你的模型如果不能预测下一次金融危机，就是花瓶。
- (4) 投稿建议：找个管理问题，跑个复杂模型，最后用一篇“全能风”论文征服审稿人。

23. Operations Research (OR)

- (1) 运营界的“极客之王”：能用数学证明世界是虚拟的？OR会把你供上神坛。
- (2) “实践是理论的绊脚石”：在这里，模型落地不如发论文重要。
- (3) 审稿人的执念：你的模型如果不能预测下一次金融危机，就是花瓶。

17. Journal of Operations Management:

OM领域的“性价比之王”，比POMS好发但比MS难啃。

18. Production and Operations Management

Management: OM领域的“水龙头”，发文量多到被怀疑放水。

19. Manufacturing and Service Operations Management

名字越长越没人懂，但发一篇能保终身教职。

20. Management Science: 管理界的“瑞士军刀”

从供应链到恋爱博弈啥都能裁。

21. Operations Research: 运筹学家的“玄学阵地”

审稿人可能自己都没看懂你的模型。

22. INFORMS Journal on Computing:

UTD24里的“备胎”，发它可能只是为了凑数，但总比没有强。

23. Organization Science: 跨学科“缝合怪”

要求“既懂博弈论又懂莎士比亚”。

24. Strategic Management Journal: 战略学者的“修仙秘籍”

但修到最后发现秘籍是审稿人写的。

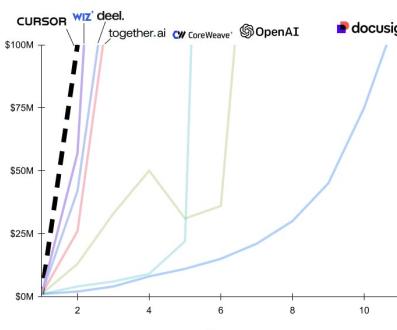
7

What's New (Feb/11/2025)



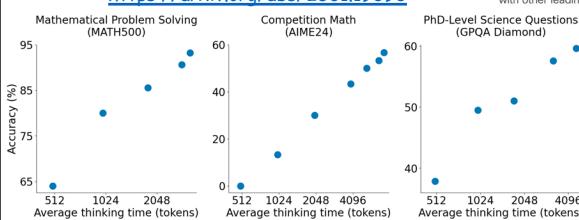
CURSOR

Years from \$1M to \$100M ARR



S1: Simple Test-Time Scaling

<https://arxiv.org/abs/2501.19393>



Exclusive: OpenAI co-founder Sutskever's SSI in talks to be valued at \$20 billion, sources say SSI: Safe Super Intelligence

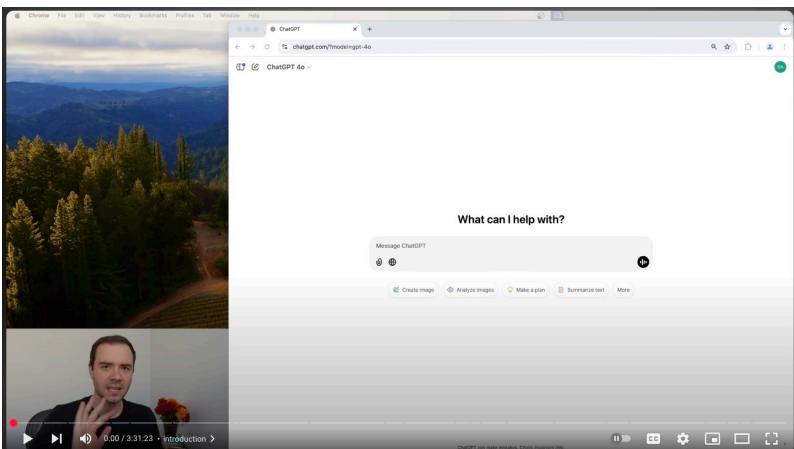
By Kenrick Cai, Krystal Hu and Anna Tong

February 8, 2025 12:24 AM GMT+8 · Updated 2 days ago



8

More Importantly.....



What can I help with?

Message ChatGPT

Create image | Analyze image | Make a plan | Summarize text | More

Deep Dive into LLMs like ChatGPT

Andréj Karpathy 653K subscribers Subscribed

509,107 views · Feb 4, 2025

This is a general audience deep dive into the Large Language Model (LLM) AI technology that powers ChatGPT and related products. It covers the full training stack of how the models are developed, along with mental models of how to think about their "psychology", and how to get the best use them in practical applications. I have one "Intro to LLMs" video already from ~year ago, but that is just a re-recording of a random talk, so I wanted to loop around and do a lot more comprehensive version.

Instructor
Andréj was a founding member at OpenAI (2015) and then Sr. Director of AI at Tesla (2017-2022), and is now a founder at Eureka Labs, which is building an AI-native school. His goal in this video is to raise knowledge and understanding of the state of the art in AI, and empower people to effectively use the latest and greatest in their work.

Find more at <https://karpathy.ai> and <https://x.com/karpathy>

33K likes | 0.00 / 3:31:23 - introduction >

Chapters

- 00:00:00 introduction
- 00:01:00 pretraining data (internet)
- 00:07:47 tokenization
- 00:14:27 neural network I/O
- 00:20:11 neural network internals
- 00:26:01 inference
- 00:31:09 GPT2: training and inference
- 00:42:52 Llama 3.1 base model inference
- 00:59:23 pretraining to post-training
- 01:01:06 post-training data (conversations)
- 01:20:32 hallucination: tool use, knowledge/working memory
- 01:41:46 knowledge of self
- 01:46:56 models need tokens to think
- 02:01:11 tokenization revisited: models struggle with spelling
- 02:04:53 jagged intelligence
- 02:07:28 supervised finetuning to reinforcement learning
- 02:14:42 reinforcement learning
- 02:27:47 DeepSeek-R1
- 02:42:07 AlphaGo
- 02:48:26 reinforcement learning from human feedback (RLHF)
- 03:09:39 preview of things to come
- 03:15:15 keeping track of LLMs
- 03:18:34 where to find LLMs
- 03:21:46 grand summary

Links

- ChatGPT <https://chatgpt.com/>
- FineWeb (pretraining dataset): <https://huggingface.co/spaces/Hugging...>
- Ttkokenizer: <https://ttkokenizer.vercel.app/>
- Transformer Neural Net 3D visualizer: <https://bbycroft.net/ilm>
- Ilm.c Let's Reproduce GPT2: <https://github.com/karpathy/ilm.c/dls...>
- Llama 3 paper from Meta: <https://arxiv.org/abs/2407.21783>
- Hyperbolic, for inference of base model: <https://app.hyperbolic.xyz/>
- InstructGPT paper on SFT: <https://arxiv.org/abs/2203.02155>
- HuggingFace inference playground: <https://huggingface.co/spaces/hugging...>
- DeepSeek-R1 paper: <https://arxiv.org/abs/2301.12948>
- TogetherAI Playground for open model inference: <https://api.together.xyz/playground>
- AlphaGo paper (PDF): <https://discovery.ucl.ac.uk/id/eprint...>
- AlphaGo Move 37 video: <https://www.youtube.com/watch?v=7xTGNNLPyMI>
- AlphaGo Move 37 video: <https://www.youtube.com/watch?v=7xTGNNLPyMI>
- LM Arena for model rankings: <https://lmarena.ai>
- AI News Newsletter: <https://buttondown.com/ainews>
- LMStudio for local inference: [https://lmstudio.ai/](https://lmstudio.ai)
- The visualization UI I was using in the video: <https://excalidraw.com/>
- The specific file of Excalidraw we built up: <https://drive.google.com/file/d/1EZh5...>
- Discord channel for Eureka Labs and this video: [/ discord](#)

<https://www.youtube.com/watch?v=7xTGNNLPyMI>

9

Andrej Karpathy  @karpathy

Part of the reason for my 3hr general audience LLM intro video is I hope to inspire others to make equivalents in their own domains of expertise, as I'd love to watch them.

5:43 AM · Feb 8, 2025 · 533.2K Views

@p10dushyanthac 4 days ago

In an era where almost everyone is trying to monetize every ounce of knowledge they have, this pure genius is releasing a 3-hour, 31-minute, and 23-second-long video for free (I am sure it would have taken at least five times that to compile this content). His videos are the most knowledge-rich content available on this topic. Andréj Karpathy, you are my favorite person on the internet. More power to you, brother.

1,839 likes | Reply

@ayogheswaran9270 4 days ago (edited)

Andrej Uploads a video on YT.
Everyone else: immediately pauses whatever they are doing. Lock themselves in a room and start watching the video.

Thanks a lot Andrej!! RESPECT.

351 likes | Reply

6 replies

Some Comments

10

What's New (Feb/18/2025)

OpenAI #50 → #1

2024 → 2025

What do you want to know?

Ask anything...

Deep Research

用提问发现世界

输入你想问的...

深度思考 DeepSeek R1

Competitive Programming with Large Reasoning Models

OpenAI*

<https://arxiv.org/abs/2502.06807>

Abstract

We show that reinforcement learning applied to large language models (LLMs) significantly boosts performance on complex coding and reasoning tasks. Additionally, we compare two general-purpose reasoning models — OpenAI o1 and an early checkpoint of o3 — with a domain-specific system, o1-*ioi*, which uses hand-engineered inference strategies designed for competing in the 2024 International Olympiad in Informatics (IOI). We competed live at IOI 2024 with o1-*ioi* and, using hand-crafted test-time strategies, placed in the 49th percentile. Under relaxed competition constraints, o1-*ioi*

IOI Performance by Submission Strategy

Submission Strategy	Score
o1-oi (50-Submissions)	213
o1-oi (10K-Submissions)	362.14
O3 (50-Submissions)	395.64

11

What's New (Feb/25/2025)

Grok 3用20万GPU帮AI界做了个实验：Scaling Law
没撞墙，但预训练不一定

腾讯科技 02-20 08:34 <https://wallstreetcn.com/articles/3741468>

Summary. As far as a quick vibe check over ~2 hours this morning, Grok 3 + Thinking feels somewhere around the state of the art territory of OpenAI's strongest models (o1-pro, \$200/month), and slightly better than DeepSeek-R1 and Gemini 2.0 Flash Thinking. Which is quite

Benchmarks

Benchmark	Grok-3	Grok-3 mini	Gemini-2 Pro	DeepSeek-V3	Claude 3.5 Sonnet	GPT-4o
Math(AIME'24)	52	45	36	39	14	8
Science(GPOA)	75	65	65	65	29	20
Coding(LCB Oct-Feb)	57	43	36	40	36	34

<https://x.ai/blog/grok-3>

DeepSeek @deepseek_ai Day 0: Warming up for #OpenSourceWeek! We're a tiny team @deepseek_ai exploring AGI. Starting next week, we'll be open-sourcing 5 repos, sharing our small but sincere progress with full transparency. These humble building blocks in our online service have been documented, deployed and battle-tested in production. As part of the open-source community, we believe that every line shared becomes collective momentum that accelerates the journey. Daily unlocks are coming soon. No ivory towers - just pure garage-energy and community-driven innovation. 11:00 PM · Feb 20, 2025 · 73.6K Views

12

Flip Side of the Coin

<https://nosetgauge.substack.com/p/capitalagi-and-human-ambition>

No Set Gauge

Capital, AGI, and human ambition

AGI will shift the relative importance of human v non-human factors of production, reducing the incentive to care about humans while making existing powers more effective and entrenched

L RUDOLF L
DEC 29, 2024

192 37 31

Share

Edited to add: *The main takeaway of this post is meant to be: Labour-replacing AI will shift the relative importance of human v non-human factors of production, which reduces the incentives for society to care about humans while making existing powers more effective and entrenched.* Many people are reading this post in a way where either (a) "capital" means just "money" (rather than also including physical capital like factories and data centres), or (b) the main concern is human-human inequality (rather than broader societal concerns about humanity's collective position, the potential for social change, and human agency).

Money currently struggles to buy talent

Money can buy you many things: capital goods, for example, can usually be bought quite straightforwardly, and cannot be bought without a lot of money (or other liquid assets, or non-liquid assets that others are willing to write contracts against, or special government powers). But it is surprisingly hard to convert raw money into labour, in a way that is competitive with top labour.

Consider Blue Origin versus SpaceX. Blue Origin was started two years earlier (2000 v 2002), had much better funding for most of its history, and even today employs almost as many people as SpaceX (11,000 v 13,000). Yet SpaceX has crushingly dominated Blue Origin. In 2000, Jeff Bezos had \$4.7B at hand. But it is hard to see what he could've done to not lose out to the comparatively money-poor SpaceX with its intense culture and outlier talent.

Most people's power/leverage derives from their labour

Labour-replacing AI also deprives almost everyone of their main lever of power and leverage. Most obviously, if you're the average Joe, you have money because someone somewhere pays you to spend your mental and/or physical efforts solving their problems.