

# News Digest

WEDNESDAY . OCTOBER 21, 2026

## The Brief Today's Headlines

**01**Meta Platforms announced a massive increase in AI capital expenditures and a new share class to fund infrastructure despite lingering profitability concerns.

**02**Global stock markets slipped as skepticism grew around the AI trade following mixed earnings reports from Tesla and other megacap technology companies.

**03**Missiles struck Kyiv shortly after Russia agreed to resume US-backed peace talks, complicating hopes for a breakthrough in the Ukraine conflict.

**04**Pope Leo XIV has recovered from lung cancer surgery and requires no further treatment following his discharge from a Rome hospital.

**05**Internet maintainers issued emergency patches for critical PHP vulnerabilities that threaten a vast portion of global web infrastructure.

## Finance 5 dispatches . 8 in brief

### Tesla Q3 Earnings Beat Masks Profit Decline and Merger Rumors

Tesla reported third-quarter earnings that beat analyst expectations on adjusted earnings per share and free cash flow. The electric vehicle maker posted adjusted earnings of 48 cents per share against revenue of \$28.05 billion. Despite the top-line beat, operating income fell 56% year over year to \$718 million. The company generated \$1.5 billion in free cash flow, largely due to capital expenditures coming in below consensus estimates. Investors noted that the cash flow beat was driven by deferred spending rather than operational efficiency improvements. Automotive gross margins rebounded to 18.1%, excluding regulatory credits which also saw a recovery. CEO Elon Musk confirmed that mass production of the Optimus humanoid robot has begun at the Fremont factory. Musk aims to scale production to 20,000 units per week

within the next year despite potential assembly complexities. Deliveries for the Optimus robot are currently targeted to begin by the end of 2027. Speculation continues to surround a potential merger between Tesla and SpaceX, which would combine billions in stock ownership. Reports indicate committees have been formed to explore the feasibility of such a massive corporate combination. The stock gained following the earnings release, reaching three-month highs despite the profit decline. Analysts remain focused on whether the company can sustain margins while investing heavily in AI and robotics. The earnings call highlighted the tension between current automotive profitability and future AI-driven growth promises. Musk tempered expectations regarding the robot timeline, citing the need for rigorous safety testing. Regulatory credit revenue was lower than previous periods, contributing to the overall income pressure. Energy storage gross profit also weakened during the quarter according to company filings. The market reaction suggests investors are pricing in the potential SpaceX deal alongside traditional automotive metrics. Overall, the quarter presented a mix of immediate financial beats and long-term strategic risks. Future quarters will test whether deferred capital expenditures return to impact cash flow negatively.

Sources Business Insider Business Insider ZeroHedge

## Meta Increases AI Capex While Path to Profitability Remains Distant

Meta Platforms announced a significant increase in capital expenditures as it doubles down on artificial intelligence infrastructure. The company spent \$34.91 billion on capex in the third quarter of 2026, up from the previous quarter. Full-year capital expenditure guidance now ranges between \$135 billion and \$145 billion. CEO Mark Zuckerberg acknowledged that its AI assistant, Muse, is currently highly unprofitable due to compute costs. Despite the losses, Zuckerberg expressed confidence that Muse will become profitable over multiple years. The AI assistant has already reached over 2 million daily users and 3 million downloads since its launch. Meta plans to monetize Muse through small transaction fees on purchases driven by the assistant. The Reality Labs division is expected to narrow its losses to \$15 billion in 2027. Zuckerberg believes Reality Labs will trend toward profitability next year driven by AI system usefulness. Investor concerns about hardware initiative profitability were addressed during the recent earnings call. The company's stock saw a 4.12% increase after-hours following the announcement of the spending plans. Chief AI Officer Alexandr Wang has been actively promoting the product through social media channels. This investment strategy represents a major bet on the future of AI agents and virtual reality. Meta is focusing on expanding Muse globally to leverage its lucrative North American user base. The heavy spending contrasts with some competitors who are slowing their AI infrastructure investments. Efficiency improvements are expected to be the key driver for future AI profitability. The company aims to justify its capex guidance through tangible business model results. Market analysts are watching closely to see if the AI bets yield sufficient returns. The earnings report highlighted the competitive pressure in the AI agent wars. Meta's strategy relies on integrating AI deeply across its family of apps and hardware devices.

Sources Business Insider Business Insider

## Stocks Slip as AI Trade Falts Amid Middle East Tensions

Stock markets declined as investors grew skeptical about the sustainability of the artificial intelligence trade. The Nasdaq 100 Index fell 1.1% while the S&P 500 dropped 0.5% during trading sessions. Disappointing earnings reports from megacap companies triggered the broader market sell-off. Tesla Inc. and Meta Platforms Inc. both contributed to the negative sentiment despite beating some estimates. Crude oil prices rose as tensions escalated in the Middle East

region. The energy sector gains provided a partial counterbalance to the technology sector downturn. Investors are increasingly cautious about the prospects for continued AI-driven growth. The decline highlights ongoing risks and uncertainties within the current market environment. Middle East tensions are likely to continue influencing oil prices in the near term. Market participants are closely watching how geopolitical events interact with tech earnings. The overall outlook for the market remains uncertain following the mixed corporate results. Analysts suggest the AI trade may be entering a period of consolidation after a strong run. Energy stocks outperformed as safety concerns drove demand for traditional assets. The correlation between tech earnings and broader index performance remains strong. Volatility is expected to persist as more companies report quarterly results. Investors are reassessing valuations in light of the latest profit data. The market reaction underscores the sensitivity of indices to AI narrative shifts. Oil gains helped limit losses but were insufficient to prevent a red close. Future market direction will depend on resolving geopolitical tensions and earnings clarity. This wrap summarizes the key financial movements affecting global indices today.

Sources Bloomberg Markets

**Related** [Tesla Q3 Earnings Beat Masks Profit Decline and Merger Rumors](#) [Meta Increases AI Capex While Path to Profitability Remains Distant](#)

## US Treasury 20-Year Auction Draws Weak Foreign Demand

The US Treasury held its latest 20-year coupon auction on Tuesday with mediocre results. The auction saw a high yield of 5.469%, which is the highest on record for this tenor. The bid to cover ratio was 2.73, representing an improvement from the previous month. However, the ratio remained below the recent average indicating soft demand. Foreign demand remained weak with indirect investors taking 58.2% of the auction. Direct investors surged to a record 31.6% of the total allocation. Dealers accounted for only 10.3% of the auction showing continued market uncertainty. The performance suggests the market may be nearing the end of the 20-year auction cycle. Some speculators believe Treasury officials may announce the end of the auction soon. Such a move would mark a significant shift in the yield curve dynamics. The yield curve has been struggling with low investor enthusiasm for long-dated debt. Auction outcomes have implications for investors and market participants alike. Changes in the auction cycle could lead to shifts in yield curve dynamics. The market is bracing for potential changes following the Treasury's next Refunding Announcement. That announcement is expected in two weeks and may bring further clarity. High yields reflect the premium investors demand for holding long-term government debt. Weak foreign participation highlights global concerns about US fiscal sustainability. Domestic buyers stepped up but not enough to fully offset external hesitation. This auction adds to the narrative of stress in the long-end of the bond market. Traders will watch future auctions for signs of stabilizing demand.

Sources ZeroHedge

## Nvidia Marketing Chief Retires Amid Leadership Shake-up

Nvidia marketing executive Laura Fay has retired after roughly a decade at the company. Fay served as the vice president of global enterprise marketing during her tenure. She oversaw significant growth of her team and the company's expansion beyond gaming. Her departure comes amidst a shake-up in Nvidia's marketing leadership structure. The company recently hired Google Cloud executive Alison Wagonfeld as its first chief marketing officer.

Wagonfeld will oversee all marketing and communications teams moving forward. She assumes responsibilities that were previously divided among several leaders. Fay's retirement is not the first to affect Nvidia's marketing leadership this year. Several other longtime employees have also retired recently including sales chief Jay Puri. Chief accounting officer Donald Robertson and VP of hardware engineering Robert Huang also departed. The retirees cited Nvidia's exponential stock run as a contributing factor to their decisions. Nvidia's communications organization has undergone a reorganization with roughly 15 employees departing since 2025. Increased scrutiny has accompanied the company's rapid growth and market dominance. Fay's departure highlights the changing landscape of Nvidia's leadership team. The company's efforts to expand beyond gaming have been a key focus under Fay. Her leadership helped establish the enterprise marketing organization during a critical growth phase. The changes reflect the company's evolving priorities and strategies in the AI sector. Investors are watching to see how the new leadership structure impacts brand perception. Marketing stability is crucial as Nvidia navigates increased competition in the chip market. This transition marks a new chapter for the AI chip giant's corporate communications.

Sources Business Insider

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**General** 5 dispatches . 5 in brief

## Pope does not need further treatment after lung cancer surgery

The Pope, Leo XIV, has completed treatment after a successful operation to remove a cancerous growth from his lung. His doctors have confirmed that no further treatment is necessary following the procedure. The 71-year-old was discharged from Rome's Gemelli Hospital four days after the operation, which was performed on October 13. The surgery removed the lower lobe of the Pope's right lung to address the issue. Test results confirmed the presence of lung adenocarcinoma, which was initially diagnosed earlier. The Pope had announced his surgery plan during his weekly Sunday prayers to keep the public informed. He stated that doctors had found a nodule on his lung and that it had been caught at an early stage. Despite his health concerns, the Pope has continued to carry out his duties diligently. This included his first weekly general audience since leaving hospital at St Peter's Square. The Pope also made phone calls to Ukrainian President Volodymyr Zelensky and Russian President Vladimir Putin. He urged a ceasefire in the blockaded Russian-occupied Ukrainian city of Oleshky during these calls. The Pope's health update matters as it highlights his dedication to his duties. It shows his ability to adapt to challenging situations while leading the Catholic Church. The fact that the cancer was localized and caught at an early stage underscores the importance of early detection. The Pope's health will likely be closely watched by the public and medical experts in the coming weeks.

Sources BBC News

## 'Targeted' attack on much-loved MP leaves Australian town heartbroken

Australian independent federal MP Helen Haines was targeted and attacked in a deliberate incident outside her office. The attack occurred in Wangaratta, Victoria, resulting in her having to have both legs amputated. Helen Haines was a well-respected and kind member of the community prior to this event. She was loved by locals for her inclusive nature and community involvement. The attack has left residents in shock following the news. Many are struggling to understand why someone would target her specifically. The incident has also raised questions about the safety of public figures in rural areas. Helen Haines' husband, Phil Haines, confirmed that her heart and mind were in good shape despite the traumatic incident. Brendan Nugent, a local man with ties to Helen Haines, has been charged with at least three counts related to the attack. Police are considering further charges, including attempted murder, as the investigation proceeds. The incident has sparked concern about the safety of public figures and the community in Wangaratta. The town is known for its welcoming nature and community events. It is now reeling from the shocking event that has taken place. The incident matters because it highlights the vulnerability of public figures to targeted violence. This is especially pertinent regarding safety in rural areas where resources may differ.

Sources BBC News

## Missiles hit Kyiv after Russia agrees to US call to resume Ukraine peace talks

The latest talks between Ukraine and the US were held in Oslo recently. They were described as constructive by Witkoff during the discussions. The talks offered a real opportunity for lasting peace, security, and prosperity, according to Kushner. The discussions come amidst a growing row between Ukraine and the US currently. Trump has been criticizing Ukraine's government during this period. He is also accusing the US of withholding critical intelligence from allies. Ukraine's President Zelensky has been a vocal critic of Trump's moves. This includes his decision to lift sanctions on Russia recently. The US has denied withholding intelligence despite the accusations. However, Ukraine's military has complained about speed restrictions on the US satellite internet network Starlink. This has constrained Ukraine's ability to use drones to conduct strikes against Russia. The talks were held amid rising tensions between Ukraine and the US. Trump blames Ukraine's attacks on Russian oil refineries for fuel price increases. Trump's actions have been criticized by Democratic and some Republican lawmakers. The US has also recently authorized fresh sanctions and tariffs on nations that import Russian oil. The Oslo talks offer a glimmer of hope for improving relations between Ukraine and the US. Much work remains to be done to stabilize the situation fully. The situation remains volatile going forward. The future of Ukraine-US relations remains uncertain at this stage.

Sources BBC News

## Jailed former DUP leader Jeffrey Donaldson being investigated over alleged rape inside Parliament

Jeffrey Donaldson, a former leader of the Democratic Unionist Party, is being investigated by London police. The investigation concerns an alleged rape of a woman inside the Houses of Parliament in 2016. The woman, who is from Northern Ireland, has previously alleged that Donaldson attempted to sexually assault her. This previous allegation was said to occur in the DUP offices at Parliament in 2016. The investigation is ongoing, with no arrests made yet by authorities. Donaldson was recently sentenced to 15 years in prison for child sex offences. He is seeking to appeal against his convictions currently. The Police Service of Northern Ireland has shared the woman's claims with the Metropolitan Police. The Met has confirmed an investigation is underway into the matter. Donaldson was a prominent figure in the DUP during the time of the alleged incident. He has a history of concerns about his behavior in London. This includes being seen drunk in the Houses of Parliament and visiting a gay sauna. The alleged incident in 2016 took place at a time when Donaldson was a key figure in the DUP. This raises concerns about his behavior in the heart of the political establishment. The investigation matters because it sheds light on the alleged wrongdoing of a former high-profile politician. It raises questions about the accountability of those in positions of power. The case also highlights the ongoing struggle for justice and accountability in the wake of the MeToo movement.

Sources BBC News

## Airbnb hosts can no longer make guests strip beds and wash dishes under new rules

Airbnb has updated its rules to limit what property hosts can ask guests to do. This includes restricting certain cleaning tasks previously requested. Under the new guidelines, hosts can set seven standard house rules and add other

reasonable requests. Guests, who are required to pay a cleaning fee, should not be asked to complete tasks typically done by a cleaner. Such tasks include washing dishes or stripping beds before departure. The new rules aim to make house rules easier to discover and clearer to set. There should be no surprises for guests regarding expectations upon arrival. The updated guidelines will apply to all reservations booked on or after November 20. Airbnb aims to protect guests from unreasonable tasks, which has been a common complaint in the past. The company has also introduced new measures to display rules more prominently. Guests are now allowed to appeal if they disagree with a host's request. The updated rules are seen as a step towards improving guest-host relations. They also aim at reducing disputes between parties during stays. This change reflects a shift in the short-term rental market dynamics. It prioritizes guest experience alongside host requirements. The implementation date is approaching quickly for upcoming bookings. Users are advised to check the new terms before traveling. This ensures compliance with the updated platform policies. The move is expected to standardize expectations across listings.

Sources BBC News

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Technology 5 dispatches . 10 in brief

Meta Unveils New Share Class for AI Amid Massive Legal Payouts

Meta is restructuring its capital to fuel an aggressive artificial intelligence strategy, announcing a new class of non-voting shares designed to fund AI initiatives and acquisitions. The move was revealed alongside the company's third-quarter earnings report, which highlighted a significant surge in capital expenditures expected to reach between \$135 billion and

\$145 billion this year. CFO Susan Li emphasized the necessity for financial flexibility to sustain growth in the rapidly evolving AI landscape, where Meta is competing fiercely with other tech giants. Despite reporting a 26% revenue increase to \$64.60 billion, the company's financial outlook is heavily shadowed by substantial legal liabilities. Meta disclosed that its operational income would have exceeded \$22 billion without a recent \$9.89 billion child safety settlement agreed upon with US attorneys general. Compounding these costs, a New Mexico judge has ordered the company to pay \$25 billion in damages for deceiving users about privacy during the Cambridge Analytica scandal. This verdict represents one of the largest against a company in American history and will fund state education spending, though Meta plans to appeal. The combination of massive AI investment and looming legal payouts underscores the high-stakes environment Meta navigates as it pivots toward an AI-driven future. CEO Mark Zuckerberg remains optimistic about growth, but investors are watching closely to see if the new share class will dilute value while protecting voting control. The strategy highlights the immense costs associated with building sprawling data centers and poaching top AI talent. The new share class will expand Meta's funding tools and give the company flexibility to pursue new strategic initiatives. This move is significant as it underscores the company's ambition to compete and sustain growth in the rapidly evolving AI landscape. Ultimately, Meta's ability to balance these expenditures against regulatory fines will define its trajectory in the coming years.

Sources [The Verge](#) [The Verge](#) [Slashdot](#)

## Critical PHP Vulnerabilities Prompt Emergency Web Patches

The maintainers of the PHP programming language have issued an urgent warning regarding two severe vulnerabilities that threaten a vast portion of the internet. Scheduled for immediate release, the emergency patches address CVE-2026-109618 and CVE-2026-109619, both carrying severity ratings of 9.2 out of 10. Security firms confirm that these flaws affect every PHP version from 2004 onward, putting popular platforms like WordPress, MediaWiki, and Joomla at significant risk. Leaked reports suggest an exploit tool dubbed PHP2Shell is already circulating, capable of executing arbitrary code on vulnerable servers. The PHP Foundation is urging all users to prepare for the update, reserving the right to release patches even earlier if active exploitation is detected. Governments in the Netherlands and Finland have already taken precautionary measures by taking certain sites offline. The vulnerabilities allow for remote code execution via memory corruption and stale global state, potentially granting hackers control over servers and access to sensitive data. With nearly 70% of websites utilizing PHP, the scope of potential damage is unprecedented in recent memory. Web hosting services including GoDaddy and Bluehost are expected to roll out updates rapidly to mitigate the threat. Administrators are advised to check their hosting services immediately to ensure their applications remain secure against these critical exploits. This incident highlights the ongoing challenges of maintaining legacy code infrastructure in an increasingly hostile security environment. PHP maintainers are working to address the vulnerabilities before they can be exploited by malicious actors. This update is crucial for website administrators to ensure the security of their websites and applications.

Sources [Ars Technica](#) [The Verge](#)

## Tesla Reports Flat Q3 Revenue While Pushing Robotaxi Network

Tesla's third-quarter earnings report revealed flat revenue and a 4% drop in profits, raising questions about the electric vehicle maker's growth trajectory amidst ambitious autonomous driving plans. While the company exceeded Wall Street

expectations in some areas, automotive revenue decreased by 3%, partly due to the expiration of federal tax credits for electric vehicles. Despite these financial headwinds, Tesla announced a target date of Q2 2027 for customers to add their own vehicles to the company's robotaxi fleet. VP of Autonomous Driving Ashok Elluswamy stated that owners will use the same software as Cybercabs to participate in the proposed Tesla Network. Skeptics note that CEO Elon Musk has a history of missing bold deadlines, and significant regulatory hurdles regarding insurance and safety standards remain. The earnings call also hinted at a potential merger between Tesla and SpaceX, adding another layer of complexity to the company's future structure. Meanwhile, interest in the Full Self-Driving feature surged, with over 75% of new buyers opting for the supervised system. Autonomous miles driven increased significantly to 3.3 million, showcasing technical progress despite the dip in vehicle sales. Capital spending soared 110% year-over-year, reflecting heavy investment in AI and robotics over immediate automotive returns. The mixed results highlight the challenge of transitioning from a car manufacturer to an AI and robotics powerhouse. Investors will be watching closely to see if the robotaxi network can materialize as promised. The company's vehicle sales were down, and profits dipped, highlighting the challenges ahead. The announcement is seen as a key development in Tesla's plans to create a Tesla Network of robotaxis, earning owners passive income while driving around autonomously. Despite the optimism, major regulatory hurdles and technical challenges remain, which could impact the success of this ambitious plan.

Sources The Verge The Verge

## Rapid AI Data Center Growth Risks Reversing Air Quality Progress

A new report warns that the rapid expansion of data centers in Texas could erase decades of progress in air quality improvements. Driven by the booming demand for generative AI, the state is bracing for four times more proposed data center capacity, much of which will run on onsite power generation. The Houston Advanced Research Center found that if planned projects plug into the grid using the anticipated mix, pollution levels for fine particles and smog-forming NOx emissions would skyrocket. Many developers are opting for gas turbines to ensure reliable power, a choice that is less efficient and more polluting than renewable alternatives. Texas currently leads the data center market with 26 gigawatts of existing and under-construction capacity, making it a focal point for this environmental conflict. The report emphasizes that continuing current trends could undo years of regulatory efforts to reduce carbon dioxide and particulate pollution. HARC CEO John Hall stated that the future air quality of children and grandchildren is now at risk due to these infrastructure decisions. Environmental advocates are urging developers to invest in solar and wind farms to minimize the ecological footprint of these facilities. The situation illustrates the hidden environmental costs associated with the global rush to build AI infrastructure. Utilities and policymakers face pressure to balance technological growth with public health concerns. The fate of air quality in the region will depend heavily on energy sourcing choices made in the coming years. This growth is driven by the need for reliable and efficient power, with many developers opting for gas turbines, which are less efficient and more polluting. Ultimately, the fate of air quality in Texas will depend on how developers and utilities meet the demand for electricity.

Sources The Verge

## SpaceX Aims for Weekly Starship Launches by Early 2027

SpaceX is preparing to attempt a Starship upper stage reflly early next year as part of a push toward rapid launch cadence. The company aims to achieve a weekly flight schedule by the first half of 2027, a significant increase from

current operations. This upcoming test includes a long-delayed refueling demonstration crucial for validating orbital propellant transfer for lunar missions. NASA and SpaceX view this milestone as essential for proving the viability of refueling in low-Earth orbit to support the Artemis Program. President and COO Gwynne Shotwell indicated that achieving complete reusability remains the long-term vision for the Starship program. The company plans to focus on its own payloads, including Starlink V3 satellites and Starmind data center prototypes, during these frequent launches. Success in these tests will help refine projections for lunar missions and enable more ambitious deep space exploration. Elon Musk continues to lead the program with a focus on pushing the boundaries of vehicle reuse never before accomplished. The increased cadence is designed to lower costs and improve reliability for both commercial and government customers. This step represents a critical phase in making interplanetary travel a practical reality. Industry observers are watching closely to see if the aggressive timeline can be met without further delays. The refueling demonstration is a crucial milestone for SpaceX and NASA to prove the viability of refueling in low-Earth orbit for lunar missions. SpaceX's primary goal is to achieve high flight cadence and push the boundaries of vehicle reuse, with a target of a weekly flight cadence by the first half of 2027.

Sources Ars Technica

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AI 1 dispatch

Germany Eases Data Center Rules Amid Climate Concerns

Germany has amended its Energy Efficiency Act to facilitate data center construction. Developers are no longer required to assess the technical feasibility of using waste heat. This heat can be easily recycled for other purposes within the local infrastructure. The amendment is viewed as a positive step for data center development in the region. Previously, Komm.ONE cited the Energy Efficiency Act as a reason for withdrawing from a project. This withdrawal occurred specifically in the Baden-Württemberg region. Some industry experts argue that objections to recycling heat are groundless. They suggest the issue is a matter of will rather than technical reason. Katherina Reiche serves as the German minister for economic affairs and energy. She believes that the amendment will unlock demand among data center developers. The change may significantly boost the German data center market. However, some experts warn that it could spark climate-focused activism. This activism could lead to permitting freezes and moratoriums in other countries. The US has already seen a shift in public attitude towards data centers. This trend is expected to spread to Europe in the near future. The amendment's impact is complex for policymakers to navigate. They must balance the need for domestic AI capabilities with climate objectives. The change has the potential to create conditions for digital sovereignty. It also carries the risk of undermining efforts to address climate change.

Sources Wired AI