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Daily Market Pulse

Frontier & Industry Intelligence : Regulated Sectors, Financial Services, Healthcare, Energy, Manufacturing

Thursday Poll Edition, Field Notes Live Issue #11: model prices are collapsing while the governance gap keeps widening. One question for our community, four answers, anonymous.

Moonshot AI's Kimi K3, a 2.8-trillion-parameter open model, took the top spot on a major coding leaderboard days after its July 16 API launch, with open weights due July 27. In the past eight days, Meta, SpaceX, and Moonshot have all released models at price points suggesting frontier intelligence is moving toward commodity pricing rather than a premium-priced asset. Anthropic ended a month of shifting deadlines on Claude Fable 5, confirming it stays inside Max and Team Premium plans at half the usual usage caps, with lower-tier plans receiving a one-time \$100 credit before moving to pay-per-use. Google DeepMind CEO Demis Hassabis has called for an independent standards body to test frontier models before public release.

Frontier Models

Price Compression

SAP completed its acquisition of Prior Labs, the pioneer of tabular foundation models, committing more than €1 billion across four years to build a European frontier AI lab. CNBC reports the White House is effectively shaping which organizations get access to frontier models, shifting negotiating power away from the labs themselves. Both signals point the same direction: where a model runs, and who controls access to it, is becoming as commercially important as what the model can do.

Sovereign AI

Access Governance

88%

74%

17.8%

170M

The World Economic Forum's latest projections show AI and related technologies creating roughly 170 million new roles by 2030 against about 92 million displaced, a net gain of 78 million that describes an entirely different set of people, not the same workers moving sideways. PwC's Global AI Jobs Barometer confirms a two-track labor market: judgement and leadership skills are increasingly rewarded, while companies furthest ahead on AI are raising both wages and headcount faster than low-exposure peers.

Financial Services

Win: 41% CAGR through 2031

Risk: audit-trail is now the product

Healthcare

Win: +14% first-pass claims

Risk: capital ahead of governance

Manufacturing

Win: energy-first investment discipline

Risk: power as the new bottleneck

Energy

Win: AI factories as grid assets

Risk: simultaneous demand shock

THIS WEEK'S QUESTION

Did you know?

Why ask this now?

What happens with the results?

Every model-selection debate we hear right now is really a governance debate wearing a pricing costume. The models are converging in capability and diverging in price. The question that actually separates a defensible deployment from an exposed one is whether you can explain, six months from now, why the model did what it did.

#FieldNotesLive #AgenticAI #EnterpriseAI #AIGovernance #FrontierModels #FinancialServices #Healthcare #Manufacturing
#EnergyAI #ArianaDigital #myndQ

Salesforce's Agentforce Help Agent and Customer Service Portal reached general availability this month on a pay-per-resolution model (\$2 per autonomous resolution). Agentforce plus Data 360 annual recurring revenue crossed \$1.2B in fiscal Q1 2027, up roughly 205% year over year, though KeyBanc and Bernstein both flagged weak customer feedback and messy underlying data in July notes. NVIDIA's Agent Toolkit now counts Adobe, Salesforce, SAP, and 14 others among its adopters. Microsoft is adding NVIDIA GPU acceleration to Fabric Data Warehouse in early access preview this month, while Snowflake and Databricks both continue branding themselves the control plane for the agentic enterprise. Microsoft, Google Cloud, Databricks, and Snowflake are all moving toward MCP-enabled architectures for agent interoperability.

Regulation

Status

Date

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