CNBC's interview with Palantir CEO Alex Karp July 1st 2026

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SUMMARY

Alex Karp, CEO of Palantir, discusses the company's recent partnership with NVIDIA, emphasizing the importance of control over data and models in enterprise settings. He expresses frustration with the current state of large language models (LLMs), arguing that many enterprises feel their intellectual property is at risk and that the technology has been oversold.

- *Karp highlights the critical infrastructure Palantir supports, stating that their ontology makes LLMs safe and precise for enterprise use.*
- *He criticizes the current LLM landscape, suggesting that enterprises are unhappy with the value provided and concerned about data ownership.*
- *The partnership with NVIDIA aims to address these concerns by allowing clients to maintain control over their data and models.*
- *Karp believes that the true value of AI lies in the combination of model, application layer, and compute, rather than just the model itself.*
- *He warns of a potential "AI bubble," where enterprises may cancel subscriptions due to inflated costs and lack of value.*
- *Karp emphasizes the need for American companies to maintain control over AI technologies, especially in critical sectors.*
- *He acknowledges the competitive landscape with China and stresses the importance of innovation and trust in American technology.*
- *Karp expresses his support for Israel while navigating complex geopolitical dynamics, indicating a nuanced approach to international relations.*

W EXCLUSIVELY AT THE TABLE, ALEX KARP, PALANTIR'S CO-FOUNDER AND CEO. AND CNBC'S SEEMA MODY, WHO COVERS PALANTIR, JOINS US. AND TELL US ABOUT TELL US ABOUT THE DEAL WITH. THERE'S SO MANY THINGS I THINK WE ALL WANT TO TALK ABOUT, BUT BUT LET'S GET TO THE NVIDIA DEAL FIRST. >> BECAUSE I HAVE SO MUCH RESPECT FOR NVIDIA AND JENSEN HUANG. I'M GOING TO TRY TO KEEP THIS MORE ADULT THAN I USUALLY DO. BUT THE TRUTH IS, IF YOU WANT TO KNOW HOW THIS CAME TOGETHER, FROM MY PERSPECTIVE, IT WAS IT WAS THERE ARE A LOT OF TECHNICAL ISSUES. WHO CONTROLS THE MODELS, WHO CONTROLS THE WEIGHTS? WHO CONTROLS THE VALUE OF YOUR BUSINESS? BUT, YOU KNOW, WE'RE, WE'RE, WE'RE SITTING ON CRITICAL INFRASTRUCTURE ACROSS AMERICA, UKRAINE, ISRAEL, EVERYONE WHO USES LLMS ON THE BATTLEFIELD RUNS ON TOP OF OUR ONTOLOGY. AND OUR CLIENTS ARE JUST TO SAY THEY'RE UNHAPPY WITH THE

FRONTIER LABS IS TO SAY, I'M WELCOME AT THE BERKELEY FACULTY. IT'S LIKE THERE'S JUST A LEVEL OF DISCOMFORT AND LOSS OF TRUST THAT ALSO MADE IT. IT REALLY, REALLY.

>> UNPACK THAT. WHAT DO YOU MEAN BY THAT? >> WELL, YOU HAVE OKAY. SO WHEN YOU'RE WHEN YOU'RE USING LARGE LANGUAGE MODELS, THEY ARE. IT'S LIKE A. AT THIS POINT, EVERYONE TECHNICAL REALIZES THEY'RE LIKE A CRITICAL RESOURCE TO MAKE THEM VALUABLE IN AN ENTERPRISE LIKE BATTLEFIELD CONTEXT OR REGULATED CONTEXT OR MANUFACTURING, YOU HAVE TO HAVE WHAT'S CALLED AN APPLICATION LAYER. AND WE, WE HAVE THIS THING CALLED ONTOLOGY THAT NOW EVERYONE'S COPYING, BUT DE FACTO, IT TAKES A LARGE LANGUAGE MODEL. IT MAKES IT SAFE AND USEFUL AND PRECISE. SO SAFE BECAUSE IT DOESN'T TOUCH YOUR UNDERLYING DATA, SAFE BECAUSE IT PREVENTS THE LARGE LANGUAGE MODEL FROM CACHING YOUR DATA AND REPLICATING YOUR BUSINESS SAFE BECAUSE IT DOESN'T TRANSFER YOUR IP OF HOW TO FIGHT SECRET DATA, TOP SECRET DATA, OR IN A CLINICAL CONTEXT. SO THE GENERAL WAY THESE THINGS WERE SOLD, AND AGAIN, THESE PEOPLE ARE SAM AND, AND DARIO, THERE'S NOTHING MORE FUN THAN DEBATING DARIO IN PRIVATE. SO THIS IS I'M NOT THROWING SHADE AT THEM. BUT SOMETHING HAS GONE COMPLETELY WRONG. AND THE BASIC VIEW AMONG ENTERPRISES IN THIS COUNTRY IS I'M GOING TO CHILL LAX AND WASTE MY TIME WITH TOKENS. I'M GOING TO GET NO VALUE AND THEY'RE GOING TO GET MY IP.

>> NOW THAT SOUNDS LIKE SHADE. OKAY. AND NOT TO SHADE. IT SOUNDS LIKE YOU'RE SAYING THESE. >> NO, NO NO, NO, THIS IS REPORTING. >> OKAY. >> AND THIS IS REPORTING THAT I'VE, I'VE LITERALLY AGAINST MY OWN INTEREST CALLED THESE ARE LIKE, I'M PROFITING FROM THIS, RIGHT? SO THE REALITY IS YOU MAY NOT LIKE US AT MY FORMER SCHOOL, HAVERFORD OR BERKELEY, BUT ENTERPRISES IN THIS COUNTRY TRUST AND LOVE US, ESPECIALLY ONES THAT ARE INVOLVED IN CRITICAL INFRASTRUCTURE, BOTH PUBLIC AND PRIVATE. OKAY, SO I WANT FOR THOSE COUNTRIES, WE'RE COMING UP TO JULY 4TH. I WANT THOSE I WANT FOR US AND OUR, OUR, OUR, OUR, OUR, OUR FRIENDS ACROSS THE GLOBE TO HAVE THE VERY BEST TECH RESOURCES. IN FACT, THE WHOLE SECRET OF PALANTIR IS THE FORWARD DEPLOYED MODEL, THE PRODUCTS THAT HAVE BEEN FIVE YEARS AHEAD.

YOU KNOW, YOU'VE BEEN WITH ME FOR A LONG TIME. EVERYONE, EVERYONE, EVERYONE SAID PHDS WERE SERVICES. THEY SAID, WE DON'T EVEN KNOW WHAT AN ONTOLOGY IS. THAT'S THE ONLY THING PEOPLE TALK ABOUT. NOW. THE SECRET WAS WE DELIVERED THE BEST THINGS FOR THE WARFIGHTERS. THOSE WARFIGHTERS HAVE SERIOUS TRUST ISSUES, BUT IT'S NOT JUST THE WAR VIS A VIS FRONTIER LABS. THEN YOU HAVE MY ENTERPRISES IN THE PRIVATE SECTOR WHO HAVE THE SAME ISSUES, LIKE WHY WOULD THEY GET ACCESS TO MY DATA IF THEY'RE GOING TO BUILD MY ALPHA?

WHY WOULDN'T I CONTROL THE WEIGHTS? WHY WOULDN'T? AND THAT'S WHERE YOU GET

THIS PARTNERSHIP. WHAT ALIGNS ME WITH NVIDIA AND I THINK IS WHAT THE TECHNICAL CUSTOMERS WANT, WHICH IS CONTROL OVER THEIR COMPUTE, THEIR MODELS, THEIR DATA STACK AND THEIR ALPHA. THEY WANT TO KNOW THEY OWN THE MEANS OF PRODUCTION. IT'S NOT BEING TRANSFERRED TO SOMEONE ELSE. THEY'RE NOT INTERESTED IN SOME FAKE DEPLOY CODE THAT SOMEHOW IS DEPLOYING TOKENS, THAT TRANSFERS THE ALPHA TO A THIRD PARTY AND THE JIG IS UP.

AND SO WE HAVE TO FIGURE OUT A WAY BOTH, BOTH OUR OUR PRODUCTS ARE AGNOSTIC. WE, WE NOW SELL A PRODUCT TO CUSTOMERS THAT ALLOWS YOU TO SWITCH FROM MODEL TO MODEL BECAUSE. AND WE'RE COMPLETELY AGNOSTIC, BUT WE NEED TO REBUILD TRUST. AND THAT TRUST IS GOING TO HAPPEN WHERE EVERYONE GETS TO ASK, ASK AND ANSWER BASIC QUESTIONS. WHO OWNS THE DATA? WHERE IS IT CACHED? ARE THE PROMPTS SECURE? IS THIS BEING TRANSFERRED TO YOU? ARE YOU BEING OKAY? IF IT WAS SO VALUABLE, LET'S SAY I CAN MAKE YOU $1 BILLION TOMORROW. WOULDN'T I SAY I'LL MAKE YOU $1 BILLION AND I WANT 30%. WHY ARE THEY CHARGING FOR TOKENS IF IT'S SO VALUABLE?

>> SO THEN, ALEX, IF THE KEY, FROM WHAT I'M HEARING YOU SAY, IS A SECURE, AMERICAN BORN OPEN SOURCE MODEL, HOW QUICKLY CAN YOUR MODEL COMPETE WITH THE FRONTIER? >> WELL, KNOW WHAT. >> I'M SAYING IS. AND AGENTIC AI. >> OKAY, WHAT I'M CLAIMING, OBVIOUSLY SLIGHTLY TRUE, BUT SLIGHTLY SELF-CENTERED IS IT'S THE MODEL PLUS AN APPLICATION LAYER PLUS COMPUTE. IT IS REALLY ALL THREE. SO IN OUR JARGON, IT'S THE VALUE, THE REASON. OKAY, JUST LOOK AT OUR FINANCIALS. THE REASON WHY EVERYONE IS CHILLAXING WITH BAD FINANCIALS AND GROWTH WITH LOSING MONEY IS THE CLIENT REFUSES TO PAY THE TRUE COST.

THE TWO PLACES THAT ACTUALLY MAKE MONEY, LIKE PROFIT FREE CASH FLOW ARE OUR APPLICATION LAYER CALLED ONTOLOGY AND COMPUTE. OKAY, WHAT? I AM NOT JUST CLAIMING WE CAN TAKE AN OPEN MODEL AND IN THE CLASSIFIED OR NON-CLASSIFIED CONTEXT, GET IT TO THE POINT OF A FRONTIER MODEL, BUT A YOU CONTROL THE WEIGHTS. SO WHAT IS THE TRUE COST? NOT JUST WHAT YOU'RE PAYING. THE TRUE COST IS NOT JUST IS WHAT YOU MAKE MINUS WHAT YOU LOSE, MEANING THE VALUE OF YOUR BUSINESS. BUT WE CAN GET THE THE FRONTIER APPLICATION TO BE EXACTLY THE SAME AS A FRONTIER MODEL, WITHOUT THE RISK OF TRANSFERRING THE ALPHA OF YOUR BUSINESS TO ANOTHER. BY THE WAY, YOU COULD DO THIS WITH A FRONTIER CLOSED MODEL TOO, BUT THEN THE CLIENTS HAVE TO BE ABLE TO ASK AND ANSWER A VERY BASIC QUESTIONS. ARE YOU KEEPING THE DATA? ARE YOU GOING TO ENTER OUR BUSINESS? WHAT DO YOU IN THE CLASSIFIED CONTEXT, WHEN THE DEPARTMENT OF WAR GOES TO YOU AND SAYS, I NEED THIS APPLICATION, DO THEY GET TO CONTROL THE WEIGHTS TO DO IT, OR DO YOU GET TO CONTROL THE WEIGHTS? ARE WE REALLY GOING TO OUTSOURCE THE BATTLEFIELD OF THIS COUNTRY TO THE CONSENSUS VIEW IN SILICON VALLEY? THAT IS EFFING INSANE. AND BY THE WAY, EVERY SINGLE ENTERPRISE IN THIS COUNTRY IN PRIVATE, A LOT OF THEM DON'T WANT TO SPEAK IN PUBLIC BECAUSE IT GETS IT GETS OUTSOURCED TO THE

NEURODIVERGENT, CRAZY PERSON THAT APPARENTLY IS ON DRUGS.

THE ONE THING I DON'T DO IT. OKAY, SO THAT'S MY ROLE. BUT I'M TELLING YOU, IN THIS COUNTRY, AT EVERY SINGLE ENTERPRISE I DEAL WITH, THESE PEOPLE ARE LIVID. THEY'RE LIKE, I AM PAYING FOR TOKENS THAT CREATE NO VALUE. THESE PEOPLE ARE STEALING THE WEIGHTS IN ALPHA OF MY BUSINESS, AND THEY'RE CREATING A WEALTH TAX THAT DOES NOT HELP THE POOR. IT JUST PUNISHES. STARTS WITH THE BILLIONAIRES. EVERY SINGLE PERSON AT THIS TABLE IS GOING TO BE PAYING A WEALTH TAX ONLY TO PUNISH US. AND THE REASON FOR IT IS BECAUSE THESE MODELS HAVE BEEN COMPLETELY OVER, IRRESPONSIBLY OVERSOLD. AND THE SALE IS IT'S DANGEROUS FOR EVERYONE, WHICH IS WHY I CAN GIVE IT TO ALL YOUR ADVERSARIES, BUT I CAN'T GIVE IT TO THE DEPARTMENT OF WAR OR I CAN'T SAFELY GIVE IT TO AN ENTERPRISE IN THIS COUNTRY WITHOUT BEING CERTAIN THAT THE ALPHA OF THAT BUSINESS COULD TRANSFER TO THIS MODEL TOMORROW. I HAVE NO BUSINESS. NO JOB.

>> YOU SOUND PRETTY ANGRY. >> NO, THE. THIS IS THE VOICE OF AMERICAN BUSINESS THAT IS BEING CHANNELED THROUGH ME. AND I'M TELLING YOU, IT IS. IT IS ABSOLUTELY A PROBLEM FOR THIS COUNTRY, BECAUSE WE ARE ON THE CUTTING EDGE OF EVERY SINGLE AI TECHNOLOGY. BUT IF YOU'RE GOING TO TRIPOLI, OVERSELL SOMETHING. AND AND BY THE WAY, THE ENTERPRISES ARE JUST TIRED OF IT. BUT BY THE WAY, JUST A MINUTE. I WANT YOU, EVERYBODY WATCHING THIS TO TEST WHAT I'M SAYING, ESPECIALLY INVESTORS WHO THINK SOMEHOW THIS IS WORKING, PICK UP THE PHONE AND CALL A CEO IN PRIVATE, NOT IN PUBLIC. EVERY SINGLE PERSON HERE CAN DO THIS. CALL 2 OR 3 AND SAY, MADMAN KARP IS ON TV SAYING, WE'RE LIVID. I'M NOT GOING TO QUOTE YOU. YOU KNOW, I WON'T QUOTE YOU. YOU HAVE A HISTORY. AND SEE, THEY'RE TWICE AS LIVID AS ME. LIKE.

>> SO IF YOU'RE RIGHT, THOUGH, DOES THAT MEAN THAT WE ARE LIVING IN SOME KIND OF TERRIBLE AI BUBBLE AND THAT WE'RE GOING TO, IN A QUARTER OR 2 OR 3 QUARTERS FROM NOW, WE'RE GOING TO HEAR THAT BIG ENTERPRISES ARE CANCELING THEIR SUBSCRIPTIONS TO THESE PRODUCTS, OR THAT THEY BUILD OUT IS GOING TO SLOW BECAUSE. >> THIS IS THIS IS THE TRAGEDY OF IT. THE REALITY OF COMPUTE PLUS ONTOLOGY PLUS MODEL CHANGE IS CHANGING THE COURSE OF HISTORY. ASK THE UKRAINIANS, ASK THE ISRAELIS, ASK OUR DEPARTMENT OF WAR. ASK THE ENTERPRISES THAT ARE WORKING.

WE DO NOT HAVE TO OVERSELL WHAT WE HAVE. WE HAVE. AND IT'S ALL BEING BUILT IN THIS COUNTRY, BASICALLY, EXCEPT FOR THE OPEN MODELS, WHICH IS A REAL THING COMING FROM CHINA, EXCEPT FOR NVIDIA OPEN MODELS, WHICH ARE WORLD CLASS. BASICALLY, IT'S ALL BEING BUILT HERE. WE DO NOT HAVE TO OVERHYPE. WE DO NOT HAVE TO OVERHYPE IT TO THE POINT WHERE WE'RE GOING TO HAVE WEALTH TAX, PUNISHING THE WEALTH. >> IF THEY'RE CHARGING THE ENTERPRISE THREE TIMES AS MUCH AS THEY SHOULD BE. YEAH. AND THEN AND THEN THEY HAVE TO PULL BACK ON THAT. THAT

CHANGES THE MATH OF ALL OF THIS.

>> WHO'S THE THEY. >> LIKE THE LARGE LANGUAGE MODELS, WHICH BY THE WAY, IMPACTS YOUR PARTNER NVIDIA BECAUSE. >> THEY SORRY, I'M TALKING ABOUT THE THEY, THE ENTERPRISES THAT POWER THIS COUNTRY AS THE MOST IMPORTANT THING YOU'RE TALKING ABOUT. THE THEY AS FRONTIER LABS IN SILICON VALLEY. THAT'S GREAT. I'M FOCUSED ON THE ENTERPRISES OF THIS. >> COUNTRY, HYPERSCALERS. >> WELL, YOU KNOW, IT IT DEPENDS WHAT THEY'RE SELLING. THAT'S VERY, VERY DOWNSTREAM FROM US. WE'RE COMPLETELY AGNOSTIC. WE PREFER A WORLD WHERE THERE ARE MORE HYPERSCALERS, WHERE THERE'S ALL SORTS OF NEW HYPERSCALERS. ELON, NVIDIA, WE LIKE THAT WORLD. WHY DO WE LIKE THE WORLD? THE SAME REASON WHEN YOU GO ONLINE AND THERE'S, YOU KNOW, THERE'S 50 KINDS OF KINDS OF COATS. YOU GET TO PICK THE ONE YOU LIKE.

BUT WHAT IS HAPPENING AMONG THE MOST TECHNICAL PLAYERS IS THEY'RE SAYING, I WANT SOMETHING I OWN. THIS IS MY BUSINESS. I WANT TO OWN THE GPUS. I WANT TO OWN MY DATA. I WANT TO OWN THE MODEL. I WANT TO CONTROL THE ALPHA. >> SO IS THAT CREATING MORE MORE OPPORTUNITY FOR. ARE YOU ALREADY SEEING THE GOVERNMENT CANCEL CONTRACTS WITH ANTHROPIC AND OPENAI AND SAYING, WE. >> WANT TO WORK. WE'RE NOT HERE. >> LITERALLY NOT HERE TO TALK ABOUT WHAT'S GOING TO HAPPEN TO A VERY IMPORTANT BUSINESS IN THE COUNTRY, EXCEPT FOR, OBVIOUSLY, TO SOME EXTENT, MINE.

IN MY BUSINESS, WE HAVE MUCH MORE DEMAND THAN WE CAN SUPPLY. THAT'S LIKE AND AND BY THE WAY, IT MAY BE SOMEWHAT MAYBE, MAYBE THE CRAZY PERSON THAT STILL ONLY CARES ABOUT FREE CASH FLOW, BUT WE HAVE MORE BUSINESS THAN WE CAN SUPPLY. AND WE HAVE LOOK, IF YOU JUST LOOK AT OUR FINANCIALS, YOU CAN SEE LIKE A TWO YEARS OUT, YOU CAN SEE 15, $18 BILLION IN FREE CASH FLOW. >> SORRY, LIKE FRUSTRATED BY THE STOCK'S PERFORMANCE OVER THE LAST.

>> YOU KNOW WHAT? I'VE BEEN AT THIS FOR 20 YEARS. WE'VE BEEN AT THIS TALKING THIS WHEN WE FIRST STARTED TALKING, PEOPLE WERE LIKE, IS THIS A SERVICES COMPANY? IS IT WORTHLESS? YEAH. THE MARKETS ARE SHORT TERM, VERY FICKLE. AND ALSO, QUITE FRANKLY, WHERE I WOULD THROW SOME SHADE, WHAT INVESTORS ACTUALLY UNDERSTAND TECH, THEY THINK BECAUSE THEY'RE VERY HIGH IQ AND THEY UNDERSTAND CERTAIN THINGS, THEY UNDERSTAND WHAT THEY'RE USING. BASICALLY THE FAULT OF INVESTORS IS TYPICALLY I USE IT, THEREFORE IT'S VALUABLE. YEAH. WHAT AN ENTERPRISE USES. IT'S DOING COMPLICATED MANUFACTURING OR PHARMACOLOGICAL RESEARCH OR PUTTING A BOMB ON OR BRINGING SPECIAL FORCES PEOPLE HOME SAFELY. VERY DIFFERENT THAN WHAT YOU'RE USING.

>> IF YOU'RE A PHARMACEUTICAL COMPANY OR YOU'RE THE GOVERNMENT, SHOULD YOU

NOT BE THEREFORE USING ANTHROPIC OR IT'S AN OPEN AI WITHOUT YOUR LAYER ON TOP? I MEAN, IS THAT WOULD YOU SAY THAT'S DANGEROUS FOR THEM? >> YOU YOU LOOK, FIRST OF ALL, HONESTLY, THE ONE THING THAT I AM SLIGHTLY FRUSTRATED ABOUT THESE THESE WHEN, WHEN, WHEN, WHEN OPENAI OR ANTHROPIC ESPECIALLY ARE TALKING ABOUT CRITICAL INFRASTRUCTURE, IT ONLY IS BEING USED IN OUR PRODUCT, MY PRODUCT. AND THERE'S A REASON FOR THAT.

THESE THINGS ARE VERY, VERY VALUABLE. WHAT, WHAT WHAT THEY HAVE DONE. BUILDING MODELS IS WORLD HISTORIC. AND JUST SO YOU SEE, I'M NOT THROWING SHADE. DARIO IS A LITERALLY HISTORIC FIGURE. AND HE HE CAME FROM BEHIND AND HE'S NOW NUMBER ONE. ALMOST NO ONE IN THE I'VE BEEN IN BUSINESS. WHATEVER YOU WANT TO CALL, I DO FOR A LONG TIME. I'VE NEVER SEEN ANYTHING LIKE THIS. OKAY. SO THE REALITY IS CRITICAL INFRASTRUCTURE DOES NOT RUN THESE MODELS WITHOUT AN APPLICATION LAYER IN ALMOST ALL CASES. AND MAYBE IT WON'T BE ALL CASES SOMEDAY THAT APPLICATION LAYERS ARE ONTOLOGY.

THAT'S A FACT. AND THERE'S A REASON FOR IT. IT'S NOT THAT, AS YOU KNOW, SOME PEOPLE LOVE ME, SOME PEOPLE HATE ME. THEY'RE NOT BUYING. THEY'RE NOT BUYING IT BECAUSE OF THAT. THEY'RE BUYING BECAUSE THESE THINGS HAVE TO BE MADE SAFE. AND THE I, I'M GOING TO TRUST YOU. YOU SHOULD TRUST ME BECAUSE I'VE NEVER LIED BS THING THAT JUST DOESN'T CUT IT AT THIS LEVEL. AND, AND ENTERPRISES ARE RUN BY THE SHREWDEST AMERICAN ENTERPRISES ARE RUN BY THE SHREWDEST, MOST WILY, INTELLIGENT PEOPLE ON THE PLANET. IF YOU THINK THEY'RE GOING FOR THAT, YOU CAN GO TRY TO SELL ME LIKE MY. MY PARENTS STILL WANT ME TO GET A JOB AS A FACULTY MEMBER AT BERKELEY. GO TRY TO GET ME A JOB AT BERKELEY.

I'M VERY QUALIFIED. IT'S NOT HAPPENING. >> DO YOU AGREE WITH THE NOTION OF THE MOST ROBUST, POWERFUL AI MODELS SHOULD BE WITHHELD FROM THE PUBLIC DUE TO CYBERSECURITY RISKS. >> LOOK, FROM. ANTHROPIC AND OPEN AI, YOU. >> REALLY HAVE TO MAKE THE ONE OF ONE OF THE THINGS WE'RE REALLY TRYING TO GET THE WEST TO DO IS MOVE AWAY FROM LIKE NOT LIKING IT. THESE ARE VERY TECHNICAL. WHAT DOES THE MODEL DO? WHO IS RESTRICTED TO. I WOULD SAY IT IS A LOSER TO RESTRICT SOMETHING FROM THE GOVERNMENT, BECAUSE YOU DON'T AGREE WITH HOW THE GOVERNMENT FIGHTS WAR AND THEN OPEN IT UP TO THE WORLD, INCLUDING OUR ADVERSARIES. GO SELL THAT TO THE AMERICAN PEOPLE WHERE THEY ALREADY DON'T LIKE YOU.

>> YOU HAVE A LOT OF DATA THAT YOU LOOK AT. DO YOU THINK CHINA IS GETTING BETTER AT AI? HOW IS THE GAP NARROWING? >> THERE ARE. >> TWO RELEVANT TECH CENTERS IN TWO AND A HALF AMERICA, CHINA, ISRAEL. THOSE ARE THE TECH CENTERS OF THE WORLD. AND WE LIKE I SPENT HALF MY LIFE IN EUROPE. I WANT EUROPE TO BE RELEVANT. AND SWEDEN HAS A REAL TECH SCENE. YOU HAVE TO BE CAN'T JUST LIKE YOU KNOW. BUT THE

RELEVANT TECH CENTERS WE ARE. WE HAVE A PEER TO PEER ADVERSARY IN CHINA. CHINA HAS LOTS OF ADVANTAGES, INCLUDING.

QUITE FRANKLY, WE HAVE TO FIND WAYS TO MAKE THESE MODELS RAISE THE STANDARD OF LIVING FOR EVERY AMERICA. AND WE NEED A SENSE AMERICANS NEED TO HAVE A SENSE. IT'S NOT JUST THE PEOPLE AT THIS TABLE, PEOPLE WATCHING IT GETTING RICH, AND THERE ARE REAL ISSUES THERE. AND WE HAVE. AND THEN WE HAVE LEFT AND RIGHT, FAR LEFT, FAR RIGHT, GONE COMPLETELY NUTS. YOU WOULD THINK THAT THE GREATEST PROBLEM IN THE WORLD IF YOU WERE ON THE FAR LEFT IS SOMEHOW IT'S LIKE IF THINGS WORK, IT'S EVIL AND BAD. BY THE WAY, I'VE BEEN WHOLESALE KICKED OUT OF MY OWN PARTY BECAUSE I WARNED THAT THIS WAS GOING TO HAPPEN ON THE LEFT, AND IT IS HAPPENING. THEN YOU HAVE ON THE FAR RIGHT, LIKE IT'S LIKE ON BOTH SIDES. YOU THINK THE BIGGEST PROBLEM OF OUR SOCIETY ARE LIKE WARLOCKS ROAMING THE STREET BUILDING TECHNOLOGY. THEY OF COURSE, THEY CAN'T UNDERSTAND IT. LIKE THEY ATTACK PALANTIR FOR THE CRAZIEST. CHINA DOESN'T HAVE THAT PROBLEM, BUT IT ALSO DOESN'T HAVE THE CREATIVITY AND INGENUITY AND, AND DEEP TECH CREATIVITY WE HAVE. BUT THE REALITY IS IT'S NOT A FOREGONE CONCLUSION THAT WE WIN, THAT WE HAVE WE HAVE THE BIGGEST PROBLEM IN THIS COUNTRY ON THESE DEBATES IS WE DEBATE THESE THINGS AS IF WE DON'T HAVE ADVERSARIES. IT'S NOT ACTUALLY TRUE. IT'S BINARY.

THEY WILL WIN OR WE WILL WIN. >> LET ME ASK YOU, I JUST WANT TO PIVOT TO A SLIGHTLY DIFFERENT CONVERSATION, BUT RELATED, YOU HAVE BEEN A PROPONENT AND GREAT SUPPORTER OF ISRAEL OVER THE YEARS, GREAT SUPPORTER OF ISRAEL. AND RIGHT NOW WE HAVE A CEASE FIRE IN THE MIDDLE EAST, WHICH WE HOPE HOLDS. HAVING SAID THAT, THERE IS A BIT OF SPACE BETWEEN WHERE THE U.S. IS NOW AND WHERE NETANYAHU IS ON WHAT IS HAPPENING HERE AND WHETHER THEY ULTIMATELY BE PROTECTED. AND I'M CURIOUS, GIVEN THAT AND GIVEN ALSO YOUR RELATIONSHIP WITH THE U.S. GOVERNMENT AND THE WORK YOU DO THERE, HOW YOU THINK ABOUT THAT DISCONNECT?

>> THE THIS IS LIKE SO MANY THINGS. I AM THE MOST PUBLICLY SUPPORTIVE CEO OF ISRAEL. AND THAT'S TRUE. I THINK ISRAEL IS A IS ON THE SIDE OF GOOD NOW IN PRIVATE, BECAUSE I HAVE. I'M KNOWN THERE. TO BE FAIR, I'M PROBABLY ALSO THE MOST EFFECTIVE CRITIC OF LIKE, HEY, I DIDN'T AGREE WITH THIS WITHOUT GOING. AND I WOULD BE VERY HAPPY TO BE MORE IN PUBLIC ABOUT THAT. EXCEPT FOR, I THINK, NOT ALL. THERE ARE MANY LEGITIMATE CRITICISMS OF ISRAEL AND EVERY OTHER COUNTRY, ALTHOUGH I WOULD SAY, DO YOU WANT A COUNTRY THAT CAN SOMETIMES BE DIFFICULT AS YOUR PARTNER, OR DO YOU WANT A COUNTRY, OR DO YOU WANT PARTNERS THAT HAVE NO TECH SCENE AS A PARTNER? AND SO LIKE, IT'S LIKE IN THIS WORLD, HAVING A, A FULLY ADULT, INDEPENDENT ALIGNED COUNTRY THAT DOESN'T ALWAYS AGREE WITH US IS MUCH BETTER THAN WHAT WE SOMEHOW HAVE IN EUROPE. LIKE THAT'S WE DO NOT WANT THAT. YES. OKAY. SO LOOK, AMERICAN ISRAEL WILL ALWAYS HAVE WILL NEVER BE FULLY ALIGNED. AND THAT'S TOTALLY OKAY. MY POSITION IS THEY ARE A VERY IMPORTANT PARTNER AND WE ARE

PROUD TO SUPPORT THEM. AND IN PRIVATE, YOU CAN BET YOUR LAST DOLLAR I CALL AND COMPLAIN ABOUT A LOT OF THINGS.

>> SO WHAT DO YOU THINK OF THIS MOU OR WHATEVER DEAL YOU THINK IS IS ON OFFER AND WHATEVER THE DEAL THAT IS, DO YOU THINK THAT WE ARE NOW IN A BETTER PLACE THAN WE WERE BEFORE? >> YOU MEAN IN. >> IRAN, IN IRAN, AND, AND, AND VIS A VIS ALSO WHAT YOU THINK IT MEANS FOR ISRAEL? >> WELL, LOOK, I DON'T ISRAEL, I'M GOING TO LEAVE THE I'M GOING TO LEAVE THE ISRAELI THING FOR MY TALKING TO THEM IN PRIVATE, BECAUSE I JUST DON'T THINK AT THIS POINT IT'S VERY HARD IN PUBLIC TO TALK ABOUT THEM BECAUSE YOU JUST HAVE PEOPLE LOOK, THERE ARE LEGITIMATE CRITICISMS OF ISRAEL.

HALF THE PEOPLE CRITICIZING ISRAEL JUST DON'T BELIEVE IT SHOULD EXIST. AND THAT'S JUST A FACT. AND SO LIKE, I'M NOT GOING TO LIKE TOTALLY PLAY INTO THEIR HANDS BY SAYING THINGS I SAY IN PRIVATE IN AMERICA, AMERICA HAS TO REP HIS OWN INTERESTS. DO I THINK IRAN'S BEEN DEGRADED? YES. ARE THERE THINGS THAT I DON'T THINK ARE IN THE PUBLIC SPACE THAT WOULD BE COMFORTING TO PEOPLE? IF THEY ARE, YES, AND I'LL LEAVE IT AT THAT.

>> WOW. PRETTY GREAT. >> THANK YOU. >> THANK YOU. >> THANK YOU. TAKE CARE. HAVE TO GET UP FROM THE SEAT. >> YOU KNOW, I JUST LIKE I FEEL LIKE I'M GOING TO BE KICKED OUT OF THE ROOM. >> NOPE. NEVER WIDE RANGING CONVERSATION. I REALLY APPRECIATE YOUR TIME. >> NO, NOT LIKE YOUR PARTY. WE WANT YOU TO. WE WANT YOU TO STAY. CAN YOU COME BACK TOMORROW? >> YEAH. NO, I'LL COME BACK. I REALLY DO APPRECIATE.

>> YOU TALKING. >> TO IT. >> YEAH. YOU KNOW, THE THING I ACTUALLY LIKE ABOUT YOU GUYS THE MOST AND I WATCH YOU IS JUST THAT YOU ACTUALLY. AND IT'S VERY HARD TO PULL THIS OFF. YOU ACTUALLY HAVE DIVERGENT OPINIONS, AND SOMEHOW YOU GUYS STAY TOGETHER. >> THIS IS TRUE. >> IT'S STILL ON CAMERA. >> OH, YEAH. >> WELL, GREAT. THAT'S TRUE. >> YOU ACTUALLY LIKE IT'S HONESTLY, IT'S SO BORING. THE OTHER STUFF LIKE. AND AGAIN, I GET KICKED OUT OF THESE ROOMS.

EVEN IF EVEN IF I AGREED WITH YOU, I WOULD TRY TO DISAGREE WITH YOU. IT'S MORE FUN. >> THERE'S SEYMA. THANK YOU FOR BRINGING ALEX HERE THIS MORNING. THANK YOU FOR YOUR PERSPECTIVE ON THIS, ALEX. THANK YOU. WE APPRECIATE IT VERY, VERY MUCH. THANKS. >> PEOPLE LIVE IN ECHO CHAMBERS. >> IT'S IT'S BEEN SO OFFENDED TO HEAR DIVERGENT OPINION. IT'S LIKE, >> WHAT DO YOU LIKE? IT'S SO CRAZY. AND I'LL TELL YOU, WE'RE OFF CAMERA NOW.

>> NO, WE'RE STILL GOING. >> LET ME GET OFF CAMERA. WHAT, DO YOU WANT ME TO READ THIS TRUMP STUFF OR NOT? >> YOU KNOW? >> OKAY, HOLD ON, ALEX. I NOW NOW WE'RE

STILL ON AND I'M GOING TO READ THIS BECAUSE PRESIDENT TRUMP WAS JUST SPEAKING TO REPORTERS AT JOINT BASE ANDREWS. HE'S PREPARING TO TAKE HIS FIRST FLIGHT ON THE QATARI GIFTED AIR FORCE ONE. HE'S EN ROUTE TO NORTH DAKOTA FOR THE OPENING OF TEDDY ROOSEVELT'S PRESIDENTIAL LIBRARY. HE ADDRESSED YESTERDAY'S FINANCIAL DISCLOSURES, SAYING EVERYONE IS PROFITING, INCLUDING HIM, BECAUSE THE STOCK MARKET IS UP AND