

Kimi K3 Reactions, The Odyssey Hits \$264M in Debut, Netflix Embraces AI | Diet TBPN

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SUMMARY

The discussion centers around the recent launch of the Kimi K3 AI model, the implications of open-source AI in the context of geopolitical tensions, and the evolving landscape of the film industry, particularly with Christopher Nolan's latest project, "The Odyssey." The speakers analyze the potential impacts of Kimi K3 on the AI market and cybersecurity, while also reflecting on the changing dynamics of audience preferences in cinema.

- Kimi K3's launch has sparked debates about the future of open-source AI and its competitive edge against closed models.*
- Concerns arise over the geopolitical implications of AI development, particularly regarding U.S.-China relations and potential IP theft.*
- Open-source AI is seen as a double-edged sword, offering innovation but also raising cybersecurity risks.*
- The film industry is shifting towards director-driven projects, with Christopher Nolan's "The Odyssey" demonstrating strong audience appeal based on the director's reputation.*
- There's a growing trend of studios investing in unique filmmakers rather than relying solely on established franchises.*
- Netflix is increasingly utilizing generative AI in production, claiming it enhances creativity without replacing traditional roles.*
- The demand for AI and cinematic experiences continues to grow, indicating a robust market for both sectors.*

Speaker 1: Monday, and there's a lot of news, the big stuff. Kimmy K3 dropped. But first we should recap the weekend. How was your weekend?

Speaker 2: The elephant in the room. And I'm wearing a suit.

Speaker 1: Yes, the elephant. Did somebody say that the elephant in the room is feeling good? He's refreshed.

Speaker 2: Yeah, refreshed. I. Yeah, was in the element to the old tree. Yes, yes, exactly. Really fun time. Glad to be back. Very, very refreshed.

Speaker 1: Very fun. I was at a Caruso property this weekend and I gotta say, being there, being at the Miramar Rosewood, I can never vote for him for public office ever again.

Speaker 3: Why?

Speaker 2: Because you want him to develop more property?

Speaker 1: Yeah, I want him laser focused on resorts and malls.

Speaker 2: It doesn't really hold up because the whole, the whole point was that there was some possibility that he could make greater Los Angeles. Something like his incredible project.

Speaker 1: You got to get a Rosewood in every city in America.

Speaker 2: And maybe I'll take private of the, of the city of Los Angeles, turn

Speaker 1: it potential into a Caruso potentially. But it was a good weekend. Glad to be back. The timeline was burning up over the weekend over the AI Cold war that's breaking out between the US Frontier Labs and Chinese open source. There's been a whole bunch of new Chinese open source models that have dropped with some promising benchmarks. The latest one that everyone is up in arms about is moonshots Kimi K3. It was unveiled last Thursday.

Speaker 1: Now they aren't actually.

Speaker 2: I kept opening X and thinking, looking, scrolling a few times, thinking, oh, I'm happy for you, or sorry that happened. I put my phone away. Yeah, I feel like I miss a lot.

Speaker 1: Yeah, I mean, it's, it's gated behind a, behind an app right now. The weights are not actually open just yet. That should happen Monday if things go to plan. But of course, there's a lot going back and forth with the administration. People are, you know, weighing every possible consequence of this. It's, you know, the classic, it's over, we're back. Is this good for semiconductors? Is this bad for semiconductors? Is this Jevons Paradox? Is it the counter example of Jevons Paradox?

Speaker 1: It's all very interesting debates and everyone's coming out with their own opinion. Dean Ball was going back and forth with two people. David Sachs and also Emil Michael were duking it out on the timeline, fighting it out back and forth, but, you know, decent takes on both sides, lots to chew through. The headlines for Kimmy are impressive but not wildly surprising based on the current trend Lines and model progress. But it does seem to invalidate the thesis that open source would start falling behind, which was something that was start.

Speaker 1: There was that chart from the government I believe that showed closed model progress was, you know, accelerating on this particular exponential and open models were falling behind. This seems like a proper catch up, something that was predicted from you know, many lab leaders that you know, the six month gap, three month gap, nine month gap. It will remain just that gap for the foreseeable future. But there are of course a bunch of other nuances here in the most above board scenario sort of here's what happened like the Moonshot

team, just a bunch of highly talented AI researchers who marshaled enough compute to release a great model.

Speaker 1: Open sourcing Kimi is a great way to grab attention, attract talent, drive demand for hosted API services that are more turnkey eventually there's a very reasonable business model behind open sourcing. Red Hat Linux of course is an open source company owned by IBM. Now I think the acquisition price was in the \$30 billion range and at any point you could just say I'm just doing Red Hat on my own. But a lot of companies pay for, you know, consultant hosted and all sorts of different services around the open source piece of software.

Speaker 1: That's sort of like the bull case, like you know, everything's going well. The more skeptical folks on the timeline are pointing to, you know, ideas such as maybe the compute was smuggled in to China against chip controls. Maybe the data was exfiltrated from frontier La Lab APIs routed through wrapper companies. Maybe this is a distillation attack. The open source strategy is a deliberate attempt to destroy American companies. It's geopolitical warfare, it's the AI cold war and there might even be spies inside companies stealing IP directly.

Speaker 1: And so that's sort of like the bad version. The reality is probably a mix of both. But we'll know more over time and we'll hear more statements from the labs and from all sorts of different participants to understand people are going back and forth on, you know, if you ask Kimi its name will it just say it's Claude or GPT. And there were some examples of people doing that. Seemed like it was photoshopped. Seemed like that also seems like the easiest thing to fix.

Speaker 1: Possibly it's just put it in the, put it in the prompt, put it in the fine tuning, never find and replace seems pretty easy.

Speaker 2: You're showing it in the reasoning trace.

Speaker 1: Yeah, but you know, I don't know, all these things are hard to assess. Over time, it takes time to actually work through what's real, what's fake, what's a hallucination. You know, they all, they all make mistakes from time to time. But there are bigger questions about AI safety in a world of powerful open source AI. I haven't seen a ton of takes from this crowd, but you have to imagine that they aren't happy about it. Maybe the Stop AI protests will head over to Beijing next and beat down the doors of Moonshot directly.

Speaker 1: But it is an odd thing because even if you're not worried about the fast takeoff, you know, grey goo paperclip monster from a cybersecurity perspective, like things are going to get more complex. There's reasonable solutions to all of this, but it is a more powerful tool in the hackers or the ACT hackers tool chest. Fortunately, Defenders have had roughly six months of frontier exclusivity with GPT Cyber and Mythos for a while. And so there's been a lot of preparation.

Speaker 1: We've talked to Nikesh at Palo Alto Networks and George at CrowdStrike about this. Like they have been aware that this is coming for a while. And so a lot of systems have been patched. But at the same time, you can just imagine now anyone who's a hacker can spin up a very, very intelligent model and start sending a bunch

of spam emails or spam text messages that stop seeming so AI. And they're not as clockable because it's just another level of intelligence and it can do reasoning traces and research.

Speaker 1: And so, you know, the, the spammer or the phishing attack can actually know what insurance you have and then pose as your insurance agent and actually know a little bit about your insurance agent instead of just sort of sending you a generic spam text. Your things are going to get more customized, more personalizable. Of course there will be more advanced defense layers. But the war is continuing. There really is no debating that open source is just cool.

Speaker 1: Like open source AI. It just feels punk rock to me. It feels like Napster, like as a kid, the idea of just like liberating all the information.

Speaker 2: It's culturally aligned to the Internet itself.

Speaker 1: Yeah, it's just a cool thing. Even though you do have to grapple with all the different problems that come from it downstream. Like the, there's something just deeply satisfying about the idea of like a solar powered server rack serving you up unstoppable intelligence, which is another good name for a Neolab, you know, a country of genius. Yeah.

Speaker 2: In some ways, to me it feels like Aligned to America's ideals. Oh, yeah, it's like, like, it feels like, like very empowering.

Speaker 1: It's total second amendment. Yeah, it's totally second.

Speaker 2: Exactly. Yeah.

Speaker 1: It's like I should be able to go off grid and have, you know, not a country of geniuses in a data center controlled by a corporation, but just like my own genius who's riding with me no matter what in my basement, you know, and it's like, even if you're not thinking like, nefarious, it's like this. It's this idea that, you know, I like to have a copy of a movie in case, like, the grid goes down.

Speaker 1: You know, the. More like, you know, apocalyptic thinking. This is a very general thing that I think a lot of people align to, especially if they're at all crypto native. It's like, why do you want bitcoin? Well, it's unstoppable money. The government can't take it from you. In certain scenarios, of course, like, there's a bunch of ways that they can. Of course, like anything else. But there, There is just something very, very attractive about bitcoin having just a machine with all of human knowledge on it.

Speaker 1: It's like a. It's like the, you know, every house used to have the, the full Encyclopedia Britannica. You could just look up anything, and now you have the LM that can solve, you know, any math problem for you. But, you know, the US Government is going back and forth on this issue how to handle the situation. And I

imagine we'll see developments this week. The Kimi K3 weights drop next Monday. And so this is the week where if the government wants to do something one way or another, they have the opportunity to do that.

Speaker 1: There were some back and forth on, like, would there be a direct ban, a hard ban, a soft ban, maybe just some, like, messaging around, hey, like, please be a patriot, don't use this foreign product. You know, there's all sorts of different ways, like the original, like, buy made in America. Buy American. That's just marketing, but it does have some effect. It's not enough to make GoPro a \$10 billion company, but it is enough to, you know, cause a little bit of motion in the, in the, in the economy.

Speaker 2: One thing that was notable over the weekend, Kimmy on X said that Kimi K3 has received far more love than we expected, and our GPUs are feeling it. Over the past 48 hours, demand has pushed close to the limits of our current capacity, capacity to protect the experience of existing subscribers, we're temporarily pausing new subscriptions and prioritizing compute for current members. We're adding capacity as fast as we can and we will reopen new subscription spots and batches.

Speaker 2: So Kimi and the world more broadly are quite supply constrained and showing that the other dimension of this whole geopolitical battle is around the hardware side.

Speaker 1: I mean, in general, I think my, my takeaway was. And Tyler, I'd be interested to hear how you process this, but I just don't see this as a black pill. Even if it's like a deep seek moment and the markets sort of bounce around for a little bit, it seems like there's still a lot of demand for frontier intelligence, a lot of demand for near frontier intelligence, a lot of demand for really cheap older models that have been baked down to basically intelligence too cheap to meter.

Speaker 1: And we are going to be in this process of go and find an actual use for something and then bake it down to be really, really cheap so that it can be offered.

Speaker 2: Yeah. And in so, so many moments over the last two years we've, there's been a company that's come out, maybe they've raised some money, you maybe forget about them for like six months and then they pop up and it turns out even though they're the number 10 company in their category, they're still growing faster than almost any company that existed like six years ago.

Speaker 1: Yeah. And a lot of it goes down to deployment too. There's like certain companies, if they're in consumer, like they just have a really good go to market motion, like they're just able to get customers to subscribe or use their product or if they're in enterprise, like they just have a great like forward deployed motion to actually do the change necessary as opposed to just like here's an API law firm, like they could have done that.

Speaker 1: And yet you have legal AI companies that have done a great job of coming in and actually creating a product that works within the confines of the, the broader organization. Well, what are your Kimmy K3 reactions, Tyler?

Speaker 4: Yeah, I mean I think it was definitely like a surprise and update. Like this is extremely good model. The idea that open source is falling behind seems like very much.

Speaker 1: We sort of got a Preview with GLM 5.2.

Speaker 4: Yes.

Speaker 1: Like people were already saying like, oh, GLM 5.2 sort of catching up.

Speaker 4: So. Yes. But even, even that, that was closer to, you know, you know, maybe a year, maybe a little less than a year behind. This seems like much closer. Yeah, but I think I broadly Agree, like, okay, there's this great open source model and now we have, okay, the Jacobian conjecture, like this kind of storied math problem is. And so like yeah, there's just going to be a lot more use like everywhere I expect these kinds of models to be used.

Speaker 1: It seems like a lot of the hype is around like specifically the parameters, the size of the model, the way it was trained it'll be. And then also it did very well in the front end arena which was interesting because that's, I mean it jumped ahead of everything there and that feels like a particular, like it'll be interesting to see because you see more and more taste going into these models. Like OpenAI is really big into the math stuff and Anthropic was really big on code early and there's all these different, like you can just tell that like oh, this lab cares about chess now and now the model's good at chess or the model got better at writing because like they, they took the time to spend a month sprinting on that.

Speaker 1: And it'll be interesting to see like where did they sprint if anywhere, where didn't they sprint? And it's sort of lagging and then what harness it works best with how important is the harness relative to everything else. But will be interesting to continue following semianalysis said similar to the panic over deep seq R1 Some uneducated people think Kimmy K3's use of linear attention KDA is bad for Nvidia HBM, DRAM and networking because it has relatively lower KV cache requirements.

Speaker 1: The opposite is true and they'll explain Kimi K3 is actually quite positive for Nvidia as large model inference is where the NVL72 shines. Because K3 has more than 2.8 trillion parameters, it requires a large scale up domain to store its weights. Secondly, although Kimi Delta attention has up to 10x lower networking requirements for KV cache transfers, its large weights require even more network bandwidth to implement an optimization called wide EP which spreads weights across different GPUs.

Speaker 1: Is China getting TPUs? Those have to be chip export restricted and probably more difficult to get into the country because there's less resellers. And in order to set up a TPU based data center you probably have to work very closely with Google. Whereas Nvidia GPUs are sort of going to like all sorts of small Neo clouds and there's a lot of places where seven steps down the chain it can wind up in a suitcase with a, with a hairdryer removing a label or something like that.

Speaker 2: Well, it's not even that you can imagine. Like if you were a Chinese lab and you wanted to get access to compute, there would be a number of ways to like set up U.S. entities.

Speaker 1: Yeah.

Speaker 2: That then basically get compute through a variety of different sources here in the U.S. yeah. And you're, you're just getting it remotely. Yeah.

Speaker 1: Nicholas Bustamante at Microsoft who is working on AI for knowledge workers says guys, the world is so compute constrained. I honestly don't understand how anyone thinks otherwise. Almost nobody is seriously using AI today and we're already hitting capacity. Everything is a bottleneck. Land for data centers permits electricity grid connections, chips, construction, cooling. Demand is growing far faster than supply and expanding supply is insanely expensive. In this game, the best position companies are the ones with massive net income from non AI products products they can fund hundreds of billions in capex.

Speaker 1: He's given a little bit of a bull case for Microsoft.

Speaker 2: Guillermo over at Vercel.

Speaker 1: Kimmy tested it.

Speaker 2: What's that?

Speaker 1: Yeah, that's good to hear.

Speaker 2: Yeah. Kimmy K3 is top tier at cybersecurity. That will, that will be interesting as the, as basically the weights are released, do we see an uptick in tax?

Speaker 1: And it's also sort of a refutation of like the, it's just distilled because the models that you would be distilling from are pretty severely nerfed on cybersecurity, at least in theory. And so it's like you would need to distill on the non, the non nerfed model, which is probably way harder because those are much more restricted. And so it does feel like there's a, there's a little bit of refutation of the idea that these are purely distilled.

Speaker 2: Seoul is a leap ahead in cyber capability at a significantly higher cost, but quite remarkable still. Fable refuses everything. We couldn't get it to complete the run at all. What is interesting is that Sol in comparison was much more open to helping with defensive cyber hardening. TLDR frontier open weight cyber capability is here. This was good high year. Harry says Rip the Bear case July 16 to July 19 perfectly coinciding with my trip, which, which is.

Speaker 2: Which is nice.

Speaker 1: Dean Ball was going back and forth, oh, some deleted posts now his observations were getting taken to task going back and forth. He says it's a very good model. I don't think its performance can be explained away by distillation or anything like that in agentic coding sessions. It seems pretty much on par with the Best public models of Q1 2026 in my fairly limited use. It also seems very token hungry. Dean says I am personally surprised the Chinese state continues to allow the open sourcing of models this good giving potential risks.

Speaker 1: Now it seems like the that is very much like from the top they are pro open source right now. Dean says to be clear, I myself might be fine with models presenting this level of marginal risk being open weight but I'm surprised that China is fine with it. I suspect the reason is that they they are is 75% explained by strategic blindness, lack of AGI pilledness. The CCP is very yann lacuny in its view of AI.

Speaker 1: The other 25% or so is their lack of compute for customer inference making China's open weight strategy an unintended byproduct of U.S. export controls. That's interesting. And the normal Chinese strategy of aggressive exports for the companies as opposed to the government. The decision to open source is partially ideological and partially because they are behind and they know that very few people would pay for sub frontier models from China. Yeah, you have to imagine that it like the idea of sending, I mean people are having discussion over like should you send your corporate data to to an American frontier lab.

Speaker 1: Imagine that that same level of should we upload our entire code base to the Moonshot API because we've gone all in on Chinese closed source which seems like that's a very very hard sell. So there is a world where there's like no money to be made in America. I don't know, maybe there's some American businesses that would just be like yeah I'm cool with it. Like take my, take everything, take all my ip. I'm antifragile. I can't be.

Speaker 1: You can't clone me so and I have no ip so just upload it all.

Speaker 2: I mean if you're a local plumbing company.

Speaker 1: Yeah, maybe.

Speaker 2: Probably in a good spot.

Speaker 1: Maybe, maybe. This is a pretty hot take. Dean says open weight models are inherently decelerationist and Tyler and I were debating this before the show. He said I'm continually surprised to see the so called accelerationists so excited about open weight models. I suspect the reason is that they know open weight models are effectively ungovernable. That's correct. And they simply like the overall cloak of ungovernability open weight models create over the whole of AI. It's not a bad strategy.

Speaker 1: It reminds me of James Scott's recounting of the Hill people in the art of not being governed. Still in

the End open weight models deter further AI capex. And this is the debate that we were having was like, how capex intensive are these frontier training runs? Because Moonshots raised, I think \$1 billion recently. And it just feels like even the, even the latest labs, like there's a lot of cost, a lot of researchers and they do a lot of experiments.

Speaker 1: But the, but the core run might not, we might not be talking about 50 billion yet. Maybe in the future, like you need to accrue towards that and maybe people wouldn't fund it if they're like, oh, you're only going to be able to monetize this for, for like three months because you're going to get distilled so fast or you're going to get copied so fast. That is tricky. Like it is nicer when you have a monopoly or oligopoly for some period of time to, to actually earn profits off of what you invested against.

Speaker 2: Well, if anyone listening to this is over at Kimmy Moonshot.

Speaker 1: Come on.

Speaker 2: No, don't come on the show. Just feel free to let us know how you made it. Yeah, maybe feel free to leak the secret sauce on the show.

Speaker 1: Come on the show.

Speaker 2: Yeah, yeah. If you're so, if you're so open. Yeah, why not? The Odyssey is up to 264 million animated opening of the year until spider man in two weeks. According to Lucas Shaw over at Bloomberg, \$375 million.

Speaker 1: Budget production was \$250 million. They recouped that immediately. 125 million in global marketing, apparently, and looks like a big financial win, but very much, you know, priced in like, you know, the base case here. The film will make a little bit over a billion dollars. The cash flow to Universal and Comcast, who are the studio behind this. You're looking at \$250 million in pre tax lifetime profit. That's 0.2% of Comcast's market value.

Speaker 1: So it's not like this crazy thing for the corporate entity, but it is exciting for the film and it's exciting for Christopher Nolan, who's in the Journal today in the business and finance section because Nolan's the Odyssey shows directors are franchises. Now. They have an interesting statistic in here. 53% of Odyssey attendees said that the director was their number one reason for attending. Not the actor, not the fact that they loved the book and they were waiting for the IP to get adapted.

Speaker 1: Not that it's a, you know, oh, they like sword and sandals. They were looking. Or that it was imax. They wanted a Nolan film. And that's. I mean, everyone knows this intuitively from talking to everyone. Everyone's like, I want to see the next Nolan film. But it's just interesting that, that there has been this huge shift towards franchises built around particular intellectual property. Verticals, Marvel, Star Wars, Disney stuff, Pixar

and whatnot. But now people are saying, I'm just going to ride with this director and whatever he does, and he can take me to the past, he can take me to the future.

Speaker 1: Wherever he goes, I'm riding with no one.

Speaker 2: I had a funny run in with Christopher Nolan. I was walking on the beach and Christopher Nolan was walking in front of me. I'm not hitting any sound effects, to be clear. And he's walking with his dog. I don't know who he is or what he looks like. Someone else who I'm with says, that's Christopher Nolan. I said, who? And then, and then it came to me.

Speaker 2: But then this dog ran up behind us. He was walking his dog. Another dog joins and is like, really messing with his dog. And so I had to be like. I just had to say, hey, man, it's not my dog.

Speaker 1: Because it seemed like.

Speaker 2: It seemed like my dog was off the frame. I was being framed for having a poorly trained dog that was harassing his dog. Yeah, but he was pretty unbothered. Let's head over to this picture from Gauthier. He had the best seat in the house.

Speaker 1: This is a real photo or do you think this is, like, take a photo and then put it in AI and say, like, make it even more distorted? Because this is what it looks like to be truly in the front row of an IMAX showing. People were really crazy about, like, the IMAX look. Way better. I think some folks on the team saw the film once, twice, three times. Who saw it in imax? Okay, we got some IMAX chats.

Speaker 4: Mike seen it, give us the review.

Speaker 1: You liked it. How many thumbs up out of 10? What do you got for me? Tyler? You can. You can chime in too. What do you think?

Speaker 3: It was fantastic.

Speaker 1: It was fantastic.

Speaker 2: Are you taking. Were you taking notes the whole time? Like, did you have a notebook?

Speaker 3: Mentally? Mentally, no, but it's great. It's an amazing accomplishment.

Speaker 1: Like, shoot the next movie in imax, dude.

Speaker 3: I mean, it's one of the best looking films, I think, ever. I mean, the quality is just, like, unmatched.

Speaker 1: You did 70 millimeter.

Speaker 3: 70 mil IMAX. It's, it's, it's incredible.

Speaker 1: It's incredible.

Speaker 2: How many times do you think how many times do you think you'll see it in theaters?

Speaker 3: Well, I mean, I'm already scheduled for four total.

Speaker 1: Four total. That's crazy.

Speaker 2: We'll see how that goes.

Speaker 4: Yeah, I was slumming it in normal theaters. I don't want to spoil it in case you haven't read it yet.

Speaker 1: Okay.

Speaker 3: Yeah.

Speaker 4: Thank you.

Speaker 1: Yeah.

Speaker 4: Just. Yeah. But I think I'm really excited to

Speaker 1: find out if he gets home.

Speaker 4: Yeah. Yeah, we'll see. My take, I posted it was missing some. Some hijinks and some gas. There are a few scenes missing from the actual poem that I would like to see, I think.

Speaker 1: Are there hijinks in the poem that you didn't. That didn't make it in?

Speaker 4: Yes, that's what I'm saying.

Speaker 1: It was low on hijinks.

Speaker 4: We should do an episode on imax.

Speaker 1: Oh, yeah, we got to film this show in imax. How would you rank it in the Nolan Cannon? Top five? Top two. What are we doing?

Speaker 4: He's not going to beat the Dark Knight. Yeah, Dark Knight.

Speaker 1: Dark Knight's better. Interception, Inception, Tenet, obviously coming back. I love Tenet.

Speaker 3: I think it says a lot about the filmmaker.

Speaker 4: If.

Speaker 3: If this film doesn't make his top three for some. That says a lot about. Or top five just with like, his filmography.

Speaker 1: Top five right now. Top five Nolan films.

Speaker 3: Go Inception, Dark Knight, Interstellar, Oppenheimer. Odyssey's got to be up there.

Speaker 1: Okay, Odyssey is in the top five. There you go. Well, hopefully Jordi can take a look at it. I think we'll get.

Speaker 2: We'll wait till I can chime in to solidify that top five.

Speaker 1: Every Hollywood studio wants its own Christopher Nolan. And I'm interested to know, like, how locked in is he with Comcast, particularly like Universal. Like, it feels like it's this huge asset, but it's wildly different than, you know, when you're Disney and you just own Marvel and there's absolutely no key man risk. But it's clearly worked out very well. The Odyssey was written and directed by Christopher Nolan. It opened to an estimated 600 \$264 million worldwide domestically.

Speaker 1: Its 124 million debut was the third biggest for any film this year. So it's not that huge. It didn't beat Toy Story 5, didn't beat Super Mario Galaxy, but it does feel like it'll have a longer run of people seeing it multiple times, paying more for imax, and it is just a breakout for an R rated historical movie. That's a niche that typically doesn't put up massive numbers like A Toy Story, for example. The opening was higher than many 2026 releases based on current, more current intellectual properties.

Speaker 1: It smoked Star wars, the Mandalorian and Groggu smoked Supergirl, and it also beat Scream 7. Nolan's brand power and commercial track record got Comcast Universal Pictures to say yes to a roughly \$250

million R rated adaptation of an ancient Greek poem shot across Europe with largely practical visual effects, including a 35 foot tall Trojan horse. According to data from Rentrac, 53% of the Odyssey attendees said the director was the number one reason for attending.

Speaker 1: It's not often you see that, said Universal president of domestic distribution Chris Nolan has earned the audience trust and respect, and that's completely true. In the late 2000s and 2010, franchises dominated the movie industry. Studios hired directors who could pump out sequels, spinoffs and remakes as efficiently as possible. Nolan was the most successful and prolific among a tiny number of filmmakers who still called their own shots. Along with the hugely successful Dark Knight trilogy, he made his original hit movies like Inception and Interstellar.

Speaker 1: But Marvel, Fast and Furious and Transformers have all stumbled at the box office recently as audiences have grown tired of them. Gen Z, in particular, appears skeptical of the industry's reliance on aging brands and technology driven filmmaking. They're more drawn to stories told by an authentic, recognizable filmmaker with a point of view, says the Wall Street Journal. Like Curry Barker, director of surprise horror blockbuster Obsession, that film was one of the several new to the big screen director driven hits this year, including including Project Hail Mary and Backrooms.

Speaker 1: In response, studios that used to obsess over franchise management are devoting more energy to signing the most promising filmmakers. So you can imagine a 10 movie deal. I think Curry Barker already has a multiple movie deal just on the back of back rooms, even though it's his first film. Studios are lost as far as knowing what works and what doesn't, said Byron Lord, CEO of CIA. Things have generally generationally changed and individual, singular voices are taking advantage.

Speaker 1: Warner Brothers gave Black Panther and Creed director Ryan Coogler an unusually generous deal to the rights to make his own original horror movie, Sinners, which became a hit last year. Weapons director Zach Krieger is a helming and adaptation of the video game Resident Evil for Sony Pictures this fall and was part of a recent multimillion dollar deal Warner made for a new horror property.

Speaker 3: Bar.

Speaker 1: Re director Greta Gerwig used her clothes clout to convince Netflix to make her adaptation of the Chronicles of Narnia interesting.

Speaker 2: They're rebooting that Netflix disclosed it has used generative AI in about 300 different productions this year already.

Speaker 1: People are going to love this across

Speaker 2: the production lifecycle from concept and pre visualization through post and delivery. Gen AI

utilization by our creative partners is scaling quickly. In 2026, Gen AI workflows have been used in roughly 300 of our titles, with the largest concentration of work in post production. We are increasingly leveraging these tools to deliver higher quality output more quickly and at a lower cost than traditional methods.

Speaker 1: One of the clearest examples came from the American Experiment, a docu series about the American Revolution. Co CEO Ted Sarando said The series included 17 minutes of AI enhanced footage that explained the scale of the project and that expanded the scale of the project and would not have been financially feasible using traditional production methods. The company insists that AI is not being introduced to replace writers, directors, actors or other creative professionals. Instead, Netflix is positioning the technology as the next evolution of filmmaking software, allowing productions to create shots and sequences that would previously have been impossible or overly expensive.

Speaker 1: Very cool. I don't know.

Speaker 2: That is our show today folks.

Speaker 1: Thank you for tuning in.

Speaker 2: It's an honor to be back here in the Ultradome. Fantastic with you all.

Speaker 1: We'll see you tomorrow at 11am Pacific. Leave us five stars on Apple Podcast and Spotify. Sign up for our newsletter tvpil.com we will see you tomorrow. Goodbye.