TIMELINE AWARENESS

The Feed Ahead

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Dedicated to the For You page.

You can see the future first on the timeline.

Over the past year the talk has gone from “AI is overhyped” to “the datacenter is the new oil field.” Everyone caught up eventually. But some people caught up eleven months early, and the difference between those two groups was not intelligence, or access, or a Bloomberg terminal. It was that one group had the app open.

Before the announcement, there is a reply. Before the reply, there is a group chat. Before the group chat, there is a guy with 4,200 followers and an anime profile picture who is simply correct about everything and has been for six years. You can either know who that guy is or you can read the Wall Street Journal on Tuesday like everyone else.

Almost no one is pricing this in.

Everybody is talking about AGI. Very few people have the wherewithal to look at what is actually in front of them, which is a scrolling column of text containing the entire capital allocation of the Western world, updating in real time, for free.

This is the essay about that.

I. From Shitposting to AGI: Counting the OOMs

The single most important fact about the timeline is that engagement is on a scaling curve, and the curve has not bent.

Count the orders of magnitude. In 2021 a good post did 40,000 impressions and you were a minor celebrity in your vertical. By 2023 that number was 400,000 and the bar had moved. Today a genuine banger clears 4 million and you get a DM from someone who runs a $6 billion fund and wants to “grab twenty minutes.” That is roughly 0.5 OOMs per year of *effective reach*, and there is no physical law stopping it.

Effective reach is the key concept and it is not the same as followers. Followers are raw parameter count. Effective reach is what you get after you account for three multipliers:

Algorithmic tailwind.
Being early to a format — long-form, video, polls, whatever the app is currently subsidizing — is worth more than a year of consistent posting. Free OOMs, distributed to whoever bothers to notice.

Unhobbling.
Most posters are running at a fraction of capacity because of self-imposed constraints. They will not quote-tweet. They will not post before 9am. They are worried about what a former colleague will think. Remove the hobbles and the same person, with the same take, does 20x. This is not a capability gain. It is the removal of a leash.

Mutual density.
Reach is not a property of an account, it is a property of a network position. Twelve well-placed mutuals beat 90,000 followers who found you through a viral post about airports.

Stack the multipliers and you get a straightforward projection. Trendlines are trendlines. **Timeline AGI by 2027 is strikingly plausible.**

II. From Posting to Superposting: The Engagement Explosion

Here is the part people miss. Reach does not top out at “famous.” It goes recursive.

Once an account is large enough that its posts generate *replies worth quoting*, it stops needing to produce original thought. It harvests. The timeline does the cognition; the account does the distribution. This is the recursive self-improvement loop, and it is already running in production.

1. Post a take.
2. Someone smarter than you corrects it in the replies.
3. Quote-tweet the correction with “this is the real story.”
4. You now have the correct take *and* the credit *and* the impressions from both posts.
5. Return to step 1, one OOM up.

Automated take discovery. A drop-in remote poster. The gap between “guy with opinions” and “guy whose opinions move a term sheet” collapses in months, not decades, and it collapses fastest for whoever is already inside the loop when it starts.

> *Superposting is not more posting. It is posting that improves itself.*

III. The Challenges

IIIa. Racing to the Trillion-Impression Feed

The buildout is real and it is enormous. Two men in suits at a desk, nine hours a day, a gong, and an ad read for a spend management platform delivered with total sincerity in the middle of a segment about semiconductor export controls. That is not a podcast. That is infrastructure.

The economics are unforgiving. Attention supply is fixed at roughly sixteen waking hours per person per day and is not growing. Demand for that attention is vertical. This is the inelastic supply / vertical demand setup, and it has exactly one historical resolution: whoever owns the bottleneck asset gets paid, and everybody building applications on top of it fights over scraps.

Do not try to guess which founder wins. Own the desk.

IIIb. Lock Down the Group Chats

Our information security is a joke.

The single most valuable asset in technology is a screenshot of a group chat, and it is protected by nothing. No NDA. No air gap. Just the vague social expectation that Chad won’t. Chad will.

Every alpha leak in the last three years has followed the same path: group chat, screenshot, anon account, the timeline, CNBC, your uncle. Total elapsed time, roughly nine hours. The state actors do not need to hack anything. They just need to be added.

We are handing over the crown jewels because someone wanted to be funny in a chat with 74 people in it.

IIIc. Superalignment

The hardest unsolved problem: keeping your posts aligned with your cap table.

You cannot post what you actually believe, because you have LPs. You cannot post nothing, because then you are not on the timeline and you do not exist. So you post the shape of a belief — directional, deniable, and vibes-forward. Everyone can tell. Everyone does it anyway.

We do not know how to solve this. Current techniques are crude: the burner, the deletion, the “speaking only for myself” in the bio. None of them scale. If your reach grows one more OOM and your alignment technique is still “I’ll just be careful,” you are one 3am post from a very expensive conversation with your general counsel.

Nobody has a plan. This should worry you more than it does.

IIId. The Free Timeline Must Prevail

There are competing platforms and they are not equivalent.

LinkedIn.

A command economy. Every post is a five-year plan about humility. Engagement is manufactured by decree. Nothing true has ever been written there.

Threads.

The population and none of the information. A demographic bubble optimized for the absence of conflict, which is the same thing as the absence of price discovery.

Bluesky.

A well-run city-state with excellent manners where the news arrives four days late, correctly sourced, to an audience that has already decided.

Only one platform still has the property that a nobody can be right in public and get paid for it within the hour. That property is fragile and it is not guaranteed to survive. Defend it.

IV. The Project

At some point the government notices that national industrial policy is being set by a livestream, and it will not tolerate this for long.

By 2028, expect the nationalization: a Federal Timeline Authority, a nine-figure appropriation, a general in a hoodie, and a compound in the desert where cleared personnel post from a SCIF. The official reasoning will be adversarial narrative manipulation. The actual reasoning will be that somebody in Washington finally opened the app, scrolled for ninety minutes, and understood with total clarity that they were the last to know about everything.

It will not work. It will produce the least popular account in the history of the internet. But it is coming, and the window before it arrives is the window that matters.

V. Parting Thoughts

I am not saying you should post more. Volume is the amateur's answer.

I am saying that the information asymmetry available to a person who reads the timeline carefully — who knows which accounts have been right, who tracks what the smart money is quietly deleting, who can tell a real leak from an engagement farm — is the largest free edge in modern finance, and it is sitting there, unclaimed, because serious people have decided it is undignified to be good at this.

Being early is indistinguishable from being wrong, right up until it isn't.

> *The gong is real. The prize is large. Refresh.*
