

ISO

INSIDE SOLUTION ONE

X: @SolutionOneFund | @tompawon

Agenda

1. Demand for Japanese bonds
2. Demand for US bonds
3. Weaker OpenAI results
4. Suspicious gains at Renault
5. Musk enters the mobile carrier game



Demand for Japanese bonds



Japan 30-Year Bond Auction Sees Firm Demand on Elevated Yields

By [Mia Glass](#)

October 8, 2026 at 5:38 AM GMT+2

Updated on October 8, 2026 at 6:06 AM GMT+2

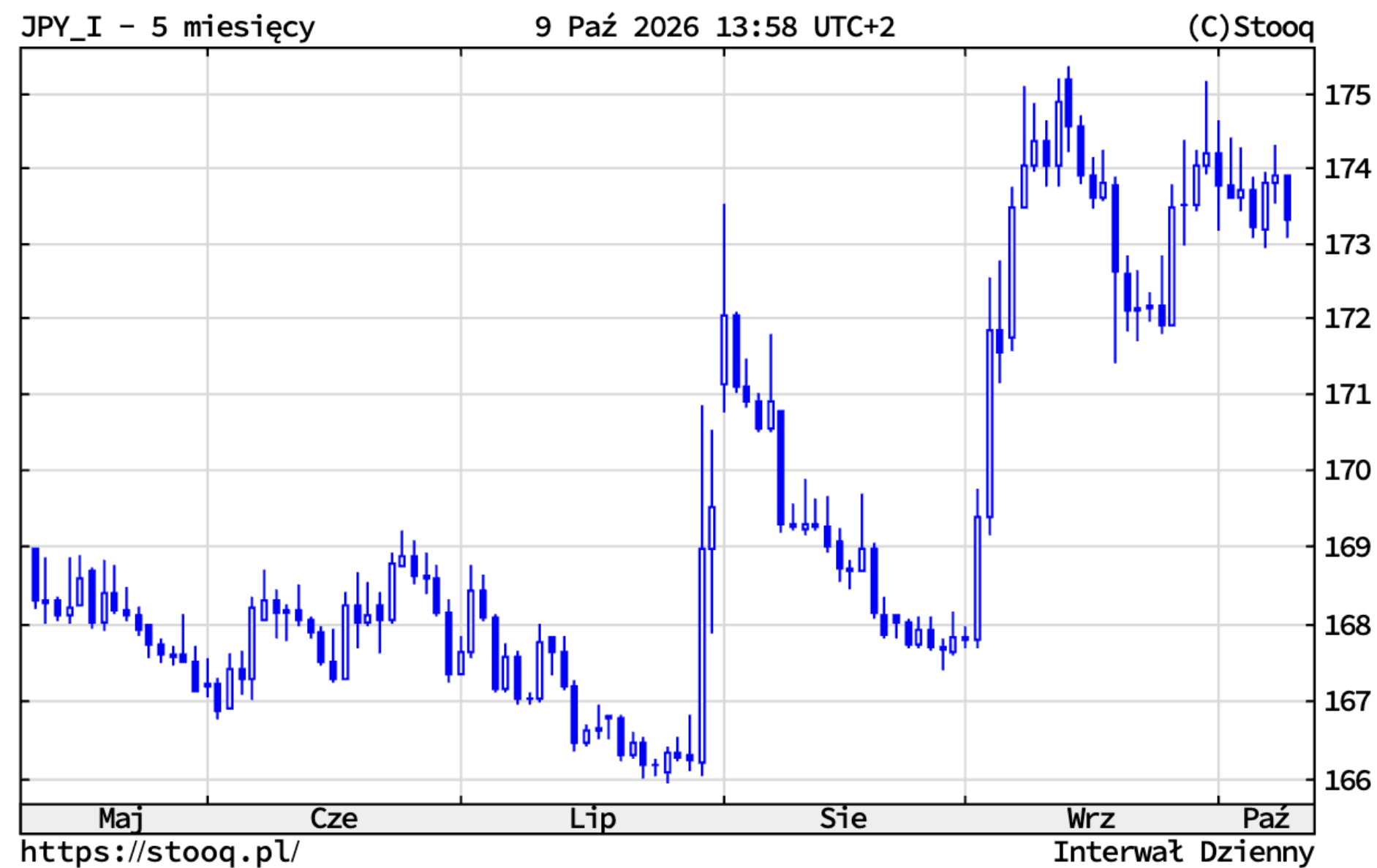
 Save

 Translate

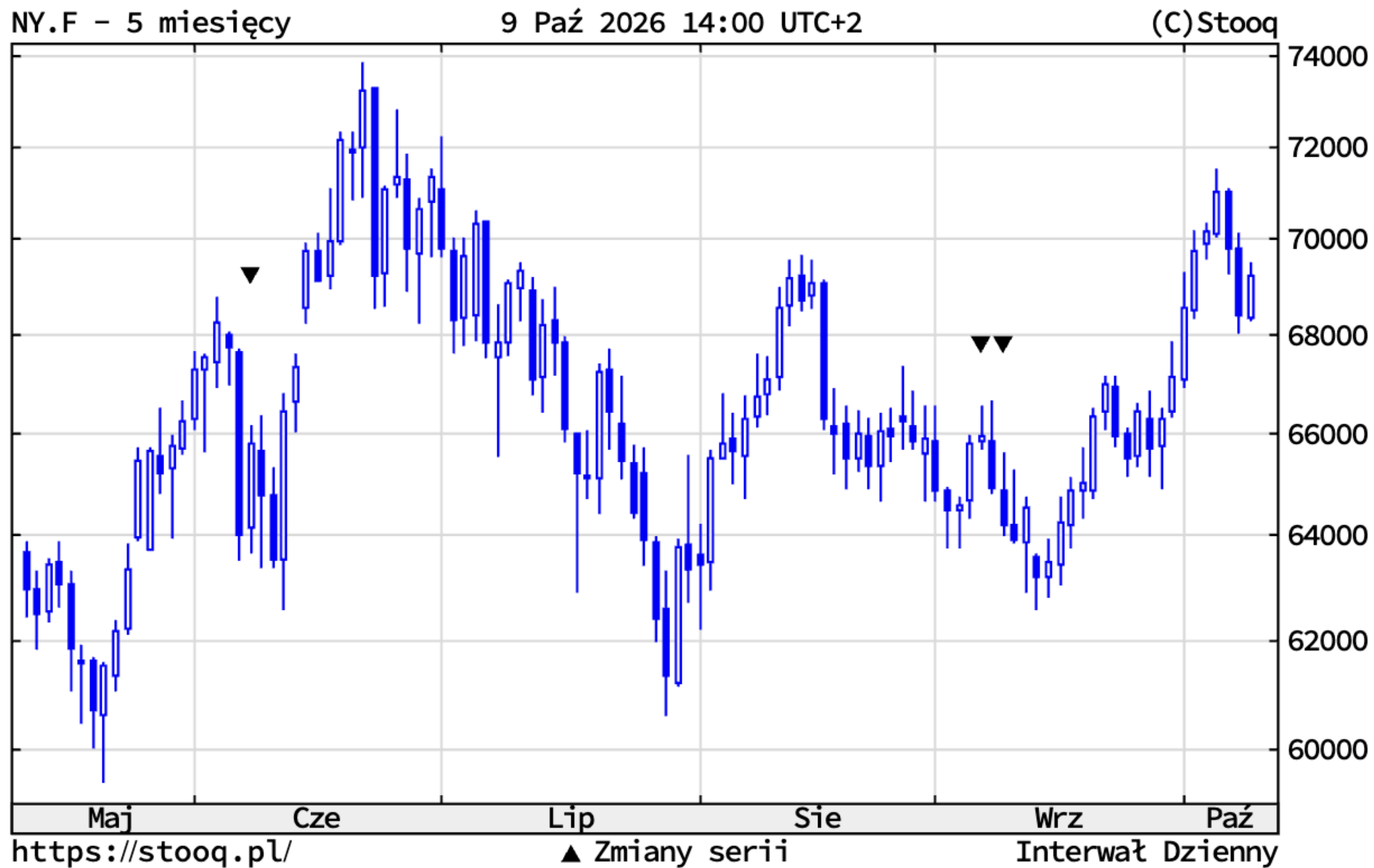
 **Takeaways** by Bloomberg AI

Japan's 30-year government bond auction drew firm demand as elevated yields attracted investors.

The bid-to-cover ratio at Thursday's sale was 3.88 compared with 3.79 at the previous auction and a 12-month average of 3.56. Japan's bonds were steady after the sale.







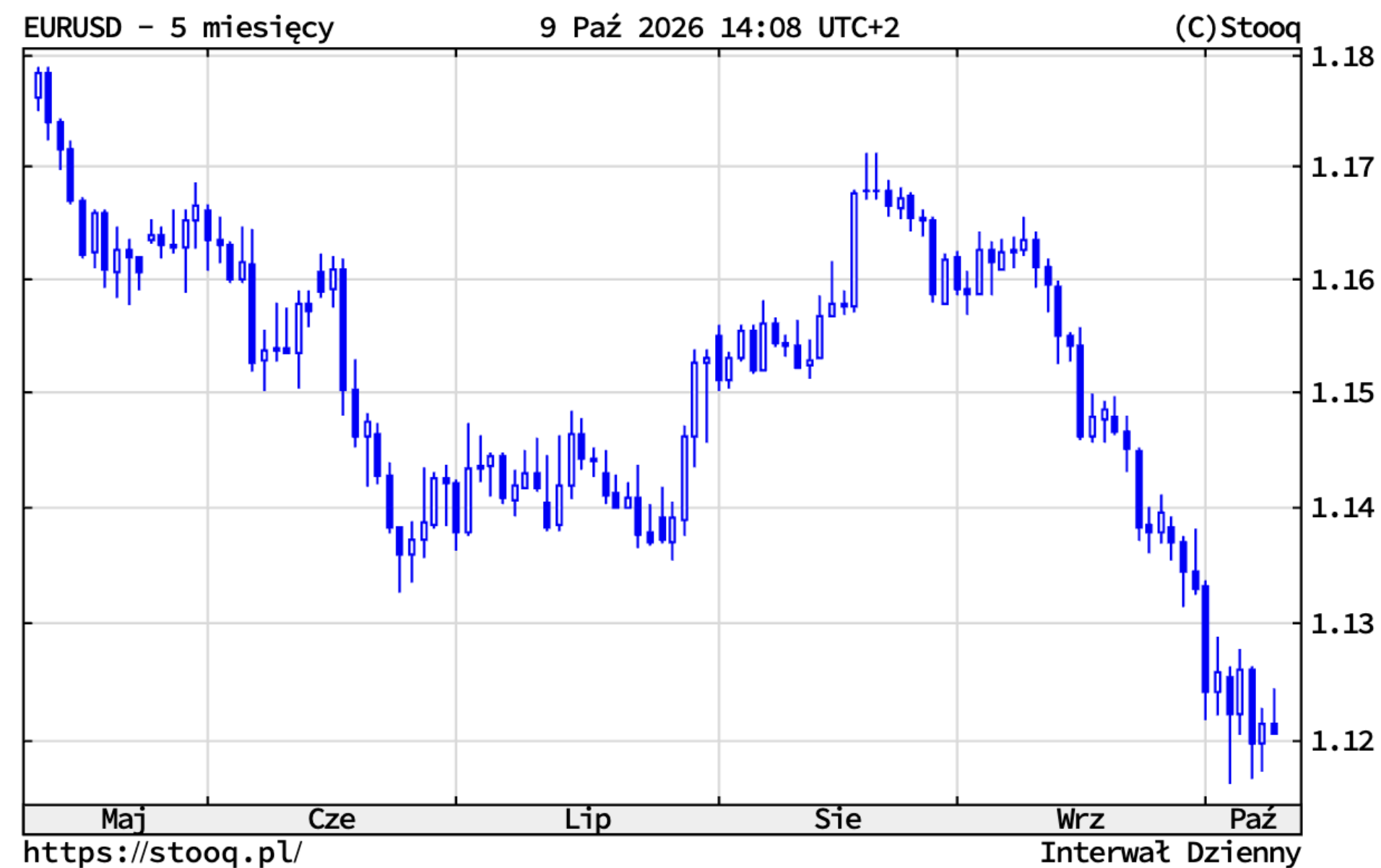
Demand for US bonds

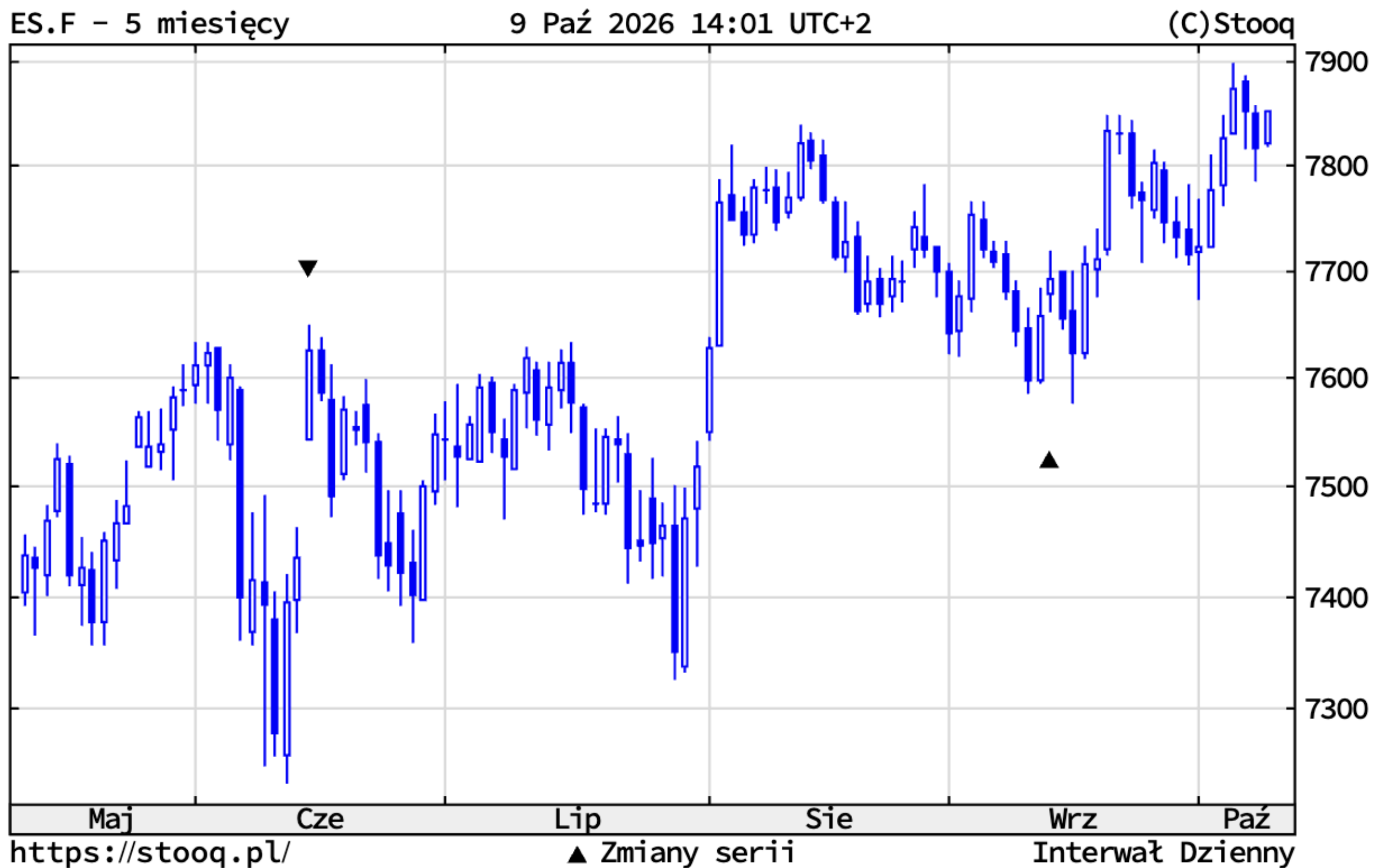


TREASURIES-US bonds rally after 30-year auction finds solid demand

REUTERS - 4:49 PM ET 10/8/2026

The bid-to-cover ratio, a measure of demand, was also high at 2.54, better than the average of 2.41 times over the last six auctions. Indirect bids, which include foreign investors, took 72.3% of supply, up from an average of 69.1% over the last six auctions.





Weaker OpenAI results

OPENAI'S ANNUALIZED REVENUE NEARS \$50B, BELOW EARLIER \$70B REPORTS: FT

OpenAI recently told investors its annualized revenue was approaching \$50B at the end of September, roughly \$20B below the figure widely reported last month.

The discrepancy reportedly stems from differences in how OpenAI and Anthropic calculate revenue. Anthropic includes sales through cloud partners such as AWS and Google Cloud, while OpenAI does not.

Investors had attempted to adjust OpenAI's figures to make them comparable with Anthropic's, contributing to the previously reported \$70B estimate.



Suspicious gains at Renault





Musk enters the mobile carrier game

Pre Market (half-spread): 9 paź, 14:24 **166.5150 +5.9450 (+3.70%)**

SPCX.US - 5 miesięcy

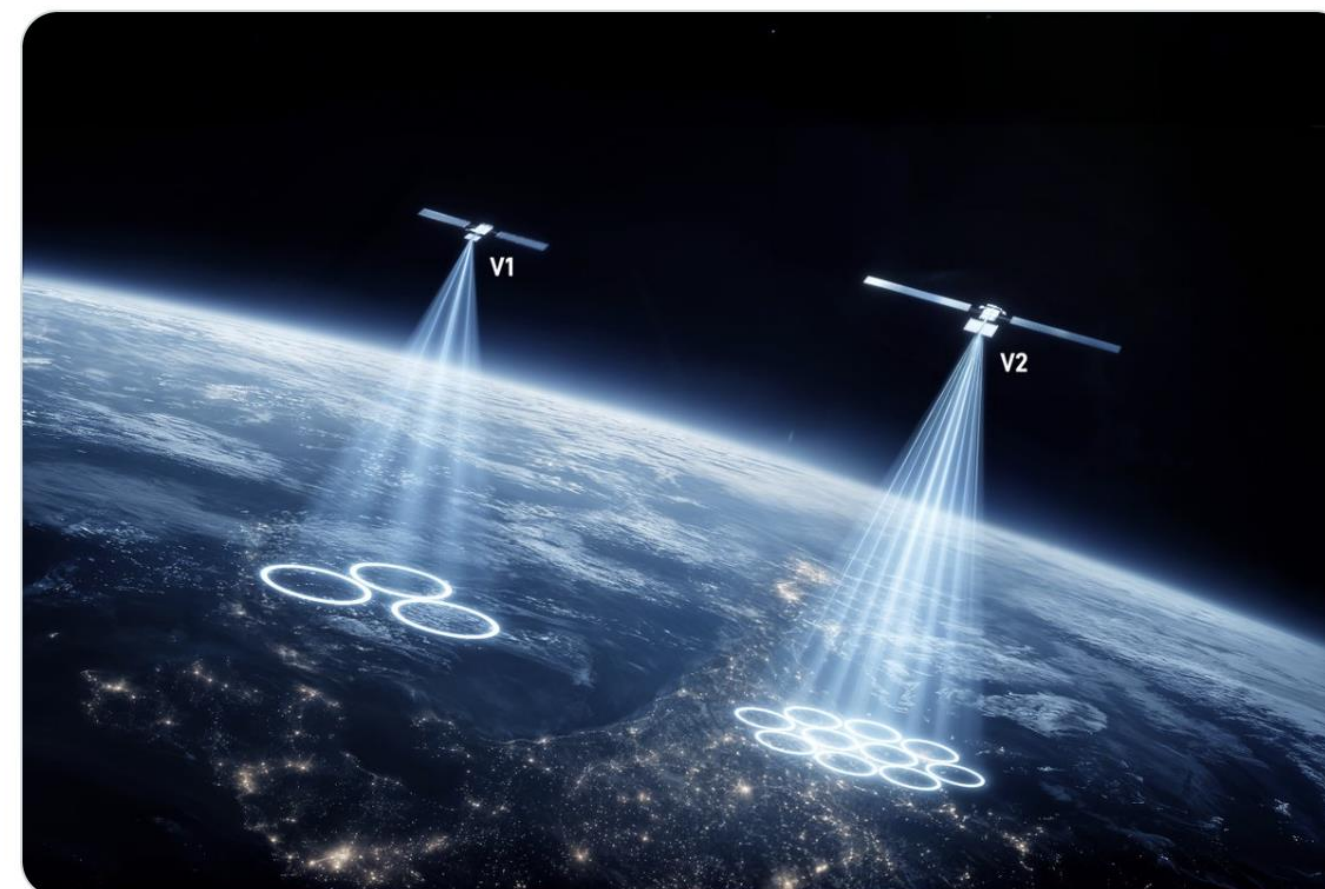
8 Paź 2026 22:00 UTC+2

(C)Stooq



We announced an agreement to acquire a nationwide low-band spectrum license portfolio that will pave the way for @Starlink to become a major mobile carrier in the US.

With this new spectrum and our Gen2 constellation, Starlink Mobile can ensure Americans have access to high-speed mobile broadband no matter where they are → [spacex.com/updates/starli...](https://spacex.com/updates/starlink-mobile)



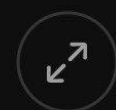


public

Verizon

Price Market cap P/E Ratio

\$43.20



↗ \$0.58 (1.27%) Today • Closed at \$46.35

↘ -\$3.15 (6.80%) after hours • live



1D

1W

1M

3M

6M

YTD

1Y

5Y

10Y

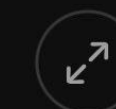


public

AT&T

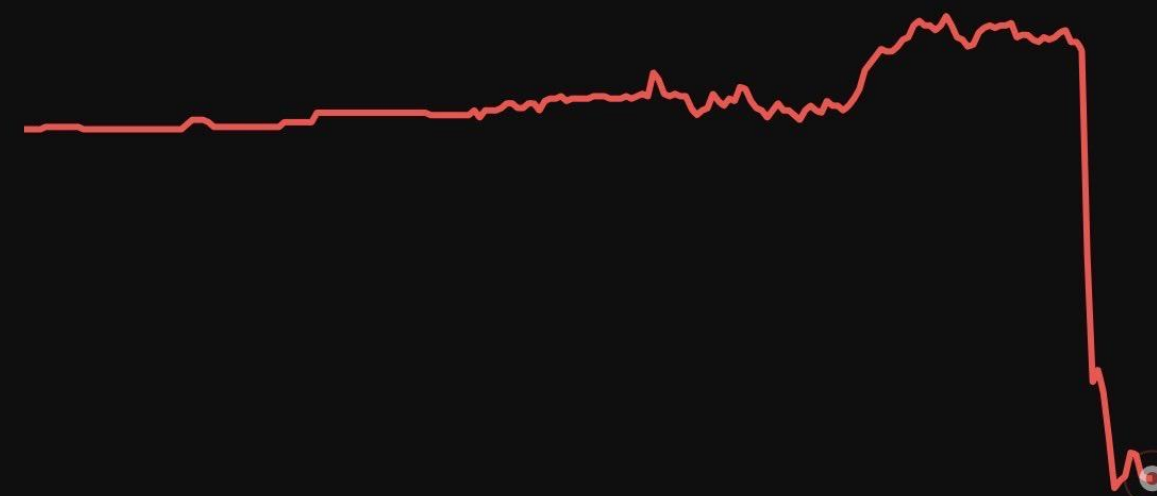
Price Market cap P/E Ratio

\$22.99



↗ \$0.40 (1.63%) Today • Closed at \$24.87

↘ -\$1.88 (7.57%) after hours • live



1D

1W

1M

3M

6M

YTD

1Y

5Y

10Y





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Thank you for your attention!

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