



STIFEL *Bits*

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The Appetizer

“I’m so, so nervous I could die. It’s just one concerto, but working with an orchestra has its own difficulties.”

– South Korean pianist **Lee Hun**, who had to relearn the piano using only his left hand after a stroke, ahead of his first orchestral collaboration at an international festival in May.

Now, on to the numbers. Drum roll, please ...

- **3,476,721:** The number of Americans named **Michael**, making it the most popular male name in the U.S.
- **1,765,503:** The number of Americans named **Mary**, making it the most popular female name in the U.S.
- **\$10 million:** The reported payday for **Justin Bieber’s Coachella** headliner gig. #bieberchella
- **\$2.1 million:** The equivalent today of what a **net worth of \$1 million** was 30 years ago.
- **50%:** The percentage of U.S. employees **who use artificial intelligence at work** at least a few times each year.

Dig In

Planes Are Full, Wallets Aren't

I might be getting ahead of myself, but with the warmer weather finally sticking around, it's starting to feel like summer. Travel remains a priority for many consumers, and the early signs point to a busy season ahead. **American Express** data shows cardholders eyeing destinations like the Indian Himalayas and Marbella, Spain. I'll stick with my usual Florida getaway, for now. Either way, demand is clearly there, with travel activity running about **4.4% higher** than this time last year.

That's the good news. The tougher part is what's happening behind the scenes.

Airlines are loving full planes but grappling with higher costs, particularly jet fuel prices, which have surged amid the U.S./Israel-Iran conflict. Naturally, that pressure **shows up** in higher ticket prices, baggage fees, and possibly your blood pressure.

And while fuel costs are the most visible pressure point, they may not be the only one that matters. The biggest economic impacts often start earlier in the supply chain and take time to show up, quietly rippling through costs, margins, and availability across industries.

For a deeper look at what's happening beneath the surface, check out last week's **Sight|Lines**.

Weekly Specials

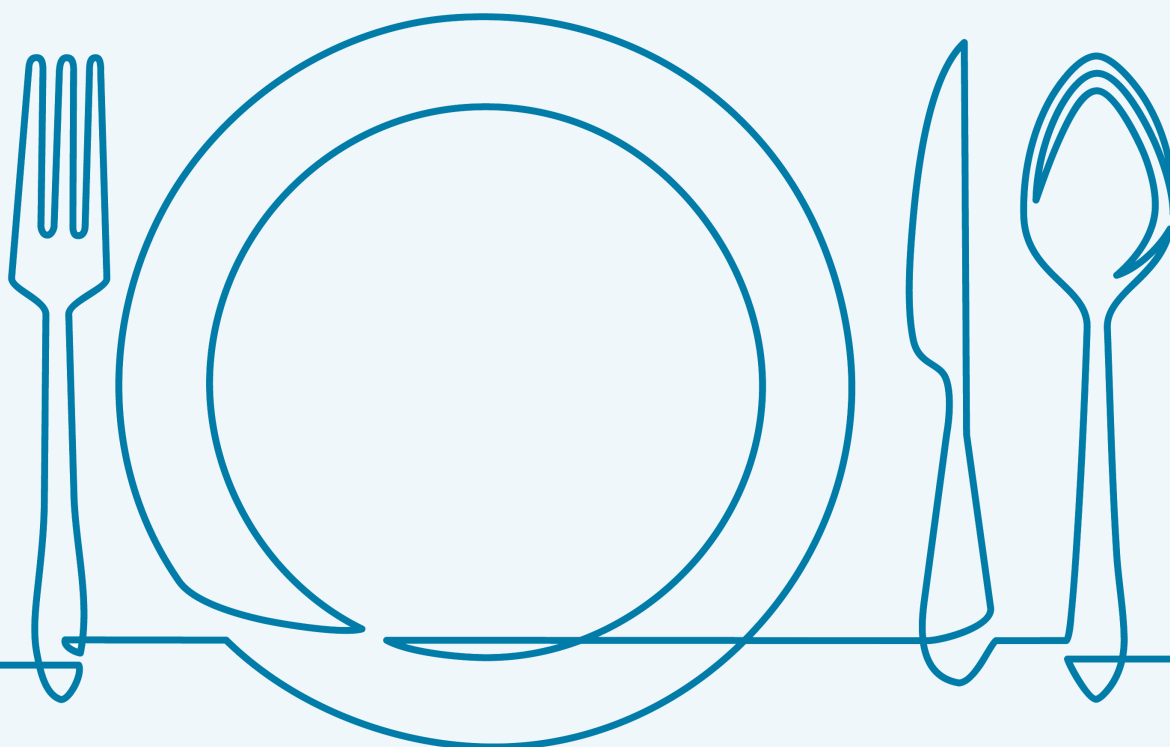
AI is digging up decades-old software bugs at lightning speed, which sounds great ... until hackers can do the same. **Bug reports are up 76%**. Now it's a full-on race: fix it fast, or someone else will exploit it first. It's like finding a dead roach in your cupboard – suddenly, everything feels suspicious.

A Paris art fan won a \$1 million **Pablo Picasso painting** with a \$117 raffle ticket after stumbling on it at dinner. 120,000 tickets sold worldwide raised \$14 million, with €1 million going to the gallery that owned the piece.

The Strawberry Acai Refresher from Starbucks walked so the rest could run. Now, **refreshers** are everywhere – bright, trendy, and basically printing money for chains like Dunkin, Starbucks, and Caribou Coffee. McDonald's just entered the chat, testing colorful refreshers and “dirty sodas” to win over Gen Z. Not saying add booze ... but also not not saying it.

Corporate Lunch

- **Anthropic's** new AI model "**Mythos**" is drawing attention in cybersecurity for its potential to be used to exploit rather than just protect, and we find the name to be fitting – a very Greek god energy, inherently good but also capable of evil.
- **Amazon** is **buying satellite company Globalstar** for \$11.6 billion to expand its LEO internet and take on Starlink. Looks like the next Prime upgrade isn't just faster shipping, it's faster Wi-Fi too.
- **Walmart** is **refreshing the look of Great Value**, its largest private label brand, to make it more colorful and modern – because it turns out customers really do judge a book by its cover.
- **United Airlines** CEO Scott Kirby is proposing a **potential merger with American Airlines**. Let's just hope United doesn't bring over its legroom-shrinking playbook to even more aircraft as part of the synergies.
- **Revolution Medicines'** **pancreatic cancer drug** succeeded in a late-stage trial, nearly doubling survival and cutting risk of death by 60% versus the current standard of care.
- **Snap** taps **Qualcomm chips** for its first consumer augmented reality (AR) glasses, which sound super cool. I'm just waiting until I can pick the frames, so I don't end up looking like Velma or Edna Mode.



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