HALF-FULL REPORT 10/31/25

All Treats, No Tricks

Happy Halloween, trick or treat took place last night in my city as a workaround for Friday night high school football. There were plenty of well-behaved kids wearing mostly homemade costumes making then rounds. One notable change from previous years happened, in fact happened three times.

Three groups of friends, young ladies likely 10 to 12 year old, politely refused the brightly colored Skittles I was passing out in favor of bite-sized chocolate bars. “Synthetic dyes are not healthy,” they said, before explaining, “Mr. Kennedy says so.”

Generation Alpha and their moms are on Team RFK.

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New York, New York

As of October 31, 2025, Zohran Mamdani holds a commanding lead in the three-way New York City mayoral race, polling at 43–50% in recent surveys (Quinnipiac, Marist, Emerson), with Andrew Cuomo trailing at 25–33% and Curtis Sliwa at 14–16%; nearly 400,000 early votes have been cast ahead of the November 4 election, where a simple plurality decides the winner in the heavily Democratic city.

Mamdani, the progressive Democratic nominee and potential first Muslim mayor, has surged on youth turnout, viral messaging, and endorsements from bodega owners and faith leaders, while fending off Islamophobia accusations against Cuomo, who courts moderates and conservatives as an independent with experience-focused attacks.

Sliwa, refusing dropout calls, splits the anti-Mamdani vote on a crime-heavy platform, boosting Mamdani's odds to 70–80% on Polymarket and Kalshi prediction markets despite a narrowing gap and high "wrong track" sentiment among voters.

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So, Why the Commie?

Societies move in long waves, in what historians call *saecula,* where the rules of power, influence, and knowledge keep changing. To make sense of those shifts, it helps to use familiar cultural characters who embody different types of capital: the power to execute, to influence perception, to connect socially, and to control access or “gate keep.”

In *The Wizard of Oz*, each of Dorothy’s companions represents one of these. The Lion seeks courage, or executional capital which is the ability to act.

The Scarecrow represents cultural capital, the kind of learned knowledge that signals authority. He chases the paper, the degree and certification that implies performance, but without the performance. He is a straw man, after all.

The Tin Man symbolizes social capital or the ability to connect, cooperate, and build trust. He intends to use the perception and empathy as a tool, just like his axe.

Dorothy herself is the moral center, the gatekeeper who keeps everything aligned. The lesson is clear: courage without judgment fails, knowledge without cooperation is useless, and social influence without direction turns chaotic.

By the mid-20th century and with society solidly in the Progressive Era, the classic TV show, *The Beverly Hillbillies*, presented these same archetypes, but as they evolved into the era's American story of capital and class.

Jed Clampett is the man of action with virtuous execution made flesh. Margaret Drysdale, wife of the banker, Milburn Drysdale, represents the refined cultural elite who gains power by withholding cooperation and performing fragility and deep offense.

Her son, Sonny, represents social capital as a showy, delicate, and thoroughly "Woke" figure using charm and identity as social leverage. The cultural and social worlds of Margaret and Sonny run on perception and access, not on production or courage.

The Wizard himself has now become the banker, Milburn, and Dorothy has become the second tier feminist, Miss Jane Hathaway.

This brings us to the current transition: the AI-driven saeculum. Here, digital systems have changed the balance of capital entirely. The power once held by those with social and cultural connections, people like Margaret and Sonny, has been replaced by those who can execute, adapt, and build systems that work in real time. The social register has become the cursed badge of privilege.

The children of the old elite, desperate to hold their ground, now try to weaponize identity and moral posturing as a substitute for lost social relevance. Modern socialists have emerged from the Ivy's and surrounding vibe and not the dockyards down at the wharf.

We are watching figures like Mamdami emerge as a product of the old Progressive order of social and cultural capital trying to stay relevant in a world ruled by digital dopamine economies. The ability to stir emotion online has replaced the old power of elite connections. Where influence once came from who you knew and what you signaled at dinner parties, it now flows from clicks, outrage, and viral visibility.

In contrast, the dominant form of capital today is personified by Dagny Taggart from *Atlas Shrugged.* She represents executional mastery with the ability to translate vision into functioning systems. Dagny doesn't posture or perform; she builds.

Her power lies in the capacity to transform complexity into order, to keep the trains running while others argue about meaning. In an age defined by digital noise and moral theatrics, execution has

become the rarest and most valuable currency. \

Dagny’s discipline and focus define the modern high performer. She adapts faster than institutions, sees further than regulators, and converts knowledge into momentum. While others seek attention or moral validation, she delivers results that reshape reality.

The AI era rewards her type: individuals who combine intelligence, precision, and willpower to build the frameworks everyone else depends on.

Across these three eras, one pattern holds: civilizations thrive when executional, cultural, social, and gate keeping powers are balanced. But when symbolic influence and performative fragility crowd out tangible output, decline follows. In the emerging AI age, only those who can combine moral clarity with operational skill will stay standing when the noise clears.

Mamdami voters know that their forms of cultural and social capital no longer guaranties access to sweet government jobs or university sinecures in the digital age. They are not voting to improve society as much as they are trying to prevent others from improving society at their expense.

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Ukraine

As of October 31, 2025, the Russia-Ukraine war has dragged into its 1,345th day with Russia launching its biggest aerial assault yet with over 700 missiles and drones in one night. Russia hammered Ukraine's power plants and cities, killing civilians (including a seven-year-old girl) and triggering nationwide blackouts.

On the ground, Russian troops are inching forward in Donetsk, using sneaky tactics like dressing as civilians and using AI-guided drones to hit supply lines near Pokrovsk, though Ukrainian defenses are holding without collapsing. Putin, ignoring Trump's push for peace, tested new nuclear-capable cruise missiles and a nuclear powered torpedo this week, while rejecting any ceasefire that doesn't give Russia everything it wants.

Ukraine floated a 12-point peace plan involving prisoner swaps and returning kidnapped kids, but Moscow dismissed it. North Korea is cozying up to Putin, more Russian soldiers are going missing, and both sides' public want talks. In short: more bombs, slow grinding gains, and zero sign of an end.

For the record, the USA was actively involved with WWII for 1,365 days.

Russia's energy sector is still the backbone of its war funding but is under severe strain. New U.S. sanctions have frozen Rosneft and Lukoil out of global finance, prompting India and China to halt Russian crude purchases and spiking world oil prices 6%.

The EU is banning Russian LNG by early 2027 and has already slashed gas imports to 19% of its

total. Ukrainian drone strikes have knocked out or damaged over a third of Russia's refineries, with the latest hits on Ryazan and Ilsky forcing permanent shutdowns due to unrepairable Western tech.

Gasoline shortages are spreading inside Russia, coal exports have collapsed to 1990s lows, and half the coal industry is unprofitable. Moscow is lifting OPEC+ cuts to boost crude output and expanding its 600-vessel "shadow fleet" to dodge sanctions, while planning more nuclear reactors domestically.

In short: sanctions and sabotage are choking revenue, raising domestic prices, and accelerating a long-term decline in Russia's fossil fuel dominance.

Without its energy sector, Russia's state is collapsing into a fiscally starved security regime. Federal revenue has dropped by 40–60%, and will soon force cuts to pensions, salaries, and regional transfers. The ruble continues to devalue, and ultimately the state security agencies will become the only fully funded institutions, enforcing control through fear rather than patronage.

Military-industrial output is still shrinking, leaving a decaying nuclear arsenal but rapidly eroding conventional power.

Russian life expectancy is now less than 70 years. It retains UN status but has no real economic leverage.

Just as Mamdami's militant voters are trying to maintain their past cultural and social capital from yesterday's Progressive saeculum, Russia is desperately trying to avoid the modern age.

They can't.

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Trump in Asia

Trump’s six-day sweep through Asia was a realignment. From Kuala Lumpur to Seoul, he re-anchored the Pacific in America’s gravitational field. This was strategy executed as theater using precision diplomacy, economic statecraft, and moral confidence.

The pivot began in Malaysia, where Trump brokered peace between Cambodia and Thailand as proof that tariff pressure, properly aimed, can end shooting wars. Seventy billion dollars in inbound Malaysian investment followed, with Thailand signing for eighty American aircraft worth nearly nineteen billion. Each deal tightened the arteries of critical rare earth mineral supply to U.S. industry, rerouting manufacturing inputs away from Beijing’s orbit and back toward American command.

In Tokyo, he was received as a sovereign peer. Emperor Naruhito’s ceremonial welcome set the stage for Trump and Prime Minister Sanae Takaichi to ink a rare earth and defense pact that fuses Japan’s precision manufacturing with America’s raw capacity to build. The visit ended at Yokosuka, where Trump spoke directly to the American fleet, reminding them that peace is preserved not by treaties, but by readiness.

Seoul provided the crescendo. President Lee Jae Myung awarded Trump the Grand Order of Mugunghwa and a crown of honor as symbols of alliance reborn. The two leaders launched a $350-billion investment framework designed to reduce tariffs, accelerate co-development, and weld their economies into a single production engine.

Then came a quiet summit with Xi Jinping, yielding a trade freeze that redirects punitive tariffs into

cooperative manufacturing and fentanyl enforcement. It is a détente grounded in strength, not concession.

Trump's Pacific realignment restores American leadership at the center of the world's growth engine while Europe drifts in bureaucratic stagnation. The EU's export stagnation reveals a continent choosing process and finance over manufacturing power. Asia, by contrast, has chosen the opposite.

Trump's America stands in the sweet spot. Wealth is coming home, alliances are re-armored, and productive energy is shifting back to the hands that can wield it.

The age of apology is over. The age of execution has begun. Dagny Taggert and her archetype are in hot demand.

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Government Shutdown

The old regime of narrative control has collapsed. What we're seeing now in the 31-day government shutdown is the death rattle of the centralized information machine that once carried Democrats and their media allies through every crisis. SNAP freezes for 42 million Americans, court orders forcing USDA to raid emergency reserves, and state governments scrambling for patchwork relief lands differently in

the new media ecosystem.

In the old days, CNN and *The New York Times* would have scripted this as a morality play pitting cruel Republicans versus noble bureaucrats. But the RINOs are almost gone, and the information monopoly with them. The field has fractured into millions of short clips, eyewitness accounts, and unfiltered dispatches from working Americans. The narrative bandwidth once reserved for elite consensus is now decentralized, and the people are using it.

Oh yeah, they tried all that censorship and shadow banning, anything to keep the elite power to crystallize consensus alive. But all that failed once Elon joined the Republicans.

That’s why the shutdown backlash is hitting Democrats, not the populist right. Polls show a six-to-eight-point rise in Republican support since mid-October and a near double-digit collapse in Democratic approval, especially among independents and blue-collar voters.

They aren’t buying the old script anymore. They’re watching real people post real footage: empty shelves, unpaid veterans, shuttered offices as clear evidence of government decay presented without the filter.

This is what a post-legacy media universe and the AI saculum looks like. Millions of small, authentic narratives now outweigh a handful of corporate talking points. The MAGA coalition thrives here because it’s organic, kinetic, and anchored in reality, not spin. The Democrats, still playing by the rules of the broadcast era, are losing the war for perception because they no longer control the signal. They are the noise.

Conservatives own the initiative; the establishment left is bleeding out. America’s working class, long manipulated through fear and spectacle, is rediscovering its voice in the swarm. This is the return of the republic to the hands of its citizens.

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Canadian Temper Tantrum

We are watching the last convulsions of Canada's political class throwing a tantrum disguised as trade policy. Toronto's elites, still clinging to their fantasy of being the polite bridge between Washington and Beijing, just ran headfirst into the new reality: America is back in command, and the age of transnational finance is over.

Doug Ford, never the sharpest knife in Ottawa's drawer, lit the match with a C$75 million ad blitz attacking Trump's tariffs using Reagan's voice like a ventriloquist dummy. It was supposed to make Trump look reckless.

Instead, it reminded Americans that Reagan used tariffs too, and strategically, not ideologically. Trump's response was textbook. He terminated trade talks, raised the tariff wall another 10%, and exposed Canada's export addiction as a dependency. With three-quarters of its exports headed south, Ottawa has no leverage left. Its mills are slowing, its auto plants bleeding, and its finance sector is begging for a lifeline.

The Senate's symbolic vote to block tariff was pure theater. The House buried it before the ink dried. What's dying here is the illusion that Bay Street could operate as a neutral broker between Washington's capital power and Beijing's industrial might. The "financial hub" myth always hid the same rot behind Toronto's big banks acting as quiet intermediaries for Chinese cash flows, laundering cartel money through "green" ventures and real estate bubbles while pretending to be the conscience of North America.

Now the fire's at their door. Trump's Asia pivot has pulled the center of gravity back to productive

economics like steel, energy, manufacturing, and minerals. The U.S. is building again, while Canada's service economy drifts into irrelevance. Bay Street's rankings are dropping with its brand of woke bureaucratic finance looking like a relic from a world that no longer exists. The polite empire of spreadsheets and carbon credits is collapsing under the weight of its own cowardice.

The irony is that this is the best thing that could happen to Canada. The tantrum is a cleansing fire. If Ottawa learns the lesson, it can pivot toward real nation-building and its own northward infrastructure and continental energy grids that can tie it to America's manufacturing revival instead of China's decay. But first it has to let go of the illusion that it can play both sides.

Trump might need to play the role of the *Wizard of Oz* to Canada's Cowardly Lion.

The age of managed decline is over. A fire is burning away the old intermediaries and middlemen like Canadian banks. The future belongs to nations that produce, not perform, and to leaders who act, not posture.

America is moving forward while yesterday's people beat their drums, burn incense, and elect socialists.

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