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Wednesday, September 9, 2026

AI, Economy, and Global Conflict Daily Briefing

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China AI, Robotics and Semiconductors In-Depth Briefing

China AI, Robotics and Semiconductors In-Depth Briefing 2026-09-09

Wednesday, September 9, 2026

Top 5 Key Developments Today

1. Huawei unveiled its flagship in-house Kirin 9050 Pro processor for the first time in six years, boasting 55% higher transistor density and enabling on-device execution of 30-billion-parameter AI models.
2. US Entity List-designated Inspur diverted \$5.6 billion in advanced tech products—including Nvidia chips—to Southeast Asia between April 2024 and February 2026 by operating through a renamed US subsidiary.
3. The Ministry of Industry and Information Technology (MIIT) released the 15th Five-Year Plan for the information and communications industry, formally codifying 6G commercialization in an official policy document for the first time, targeting 4 trillion yuan in industry revenue by 2030.
4. Moore Threads hit the 20% daily lower limit on the day major shareholder lockup shares were released, driving the company's valuation below 200 billion yuan.
5. In China's AI micro-drama market, 95% of new titles in Q1 were produced using AI, with likeness rights for ordinary individuals trading from as low as 99 yuan per episode.

AI Micro-Dramas Are Reshaping China's Content Production

According to the China Netcasting Services Association, approximately 122,000 out of 128,000 micro-dramas produced in the first quarter of 2026 utilized AI, representing 95% of total production. From January to May, the market size surpassed 22 billion yuan, with annual projections reaching 40 billion yuan. The user base exceeded 600 million in the first half of the year.

Marketplaces trading portrait rights for content production have emerged. Shenzhen-based ActID licenses portrait rights of ordinary individuals for 99 to 500 yuan per episode. Chengdu-based New Claw charges over 500 yuan per image. ByteDance's Hongguo platform has also entered the space.

ByteDance removed 85,000 unauthorized face-cloning videos this year. The Guangzhou Internet Court processed 700 AI face-theft disputes over a three-year period. Audience fatigue has also surfaced as identical likenesses repeatedly appear across different productions.

In the absence of established legal standards for commercial transactions involving portrait rights and biometric data, disputes are likely to multiply.

Generative AI Service Registrations Reach 1,372; AI Agent Regulatory Standards Initiated

As of May, cumulative generative AI services registered with the Cyberspace Administration of China (CAC) reached 1,372, more than tripling from 406 at the end of 2024.

In May, three ministries—the CAC, the National Development and Reform Commission (NDRC), and the MIIT—issued joint guidance on standardizing AI agents. Agents are defined as AI systems capable of autonomous judgment and task execution. The authorities established a tiered classification system for oversight and designated 19 specific application domains. High-risk domains

are subject to mandatory registration, compliance testing, and recall procedures.

Robotics, Humanoids & Embodied Intelligence

Agibot Nears Q3 Hong Kong IPO Target

Agibot (智元机器人) initiated Hong Kong listing procedures on July 24, with CITIC Securities, CICC, and Morgan Stanley serving as underwriters. The company's valuation is estimated between \$5.1 billion and \$6.4 billion. It plans to raise over \$1 billion by offering a 15% to 25% stake. With the IPO targeted for the third quarter, the public offering price could be announced within weeks.

First-half shipments reached approximately 15,000 units. According to Counterpoint Research, Agibot ranks first globally with a 43% share of the humanoid robot market. Investors include Tencent, BYD, LG Electronics, and Mirae Asset. At IFA 2026, the company demonstrated its A3 model performing brush calligraphy using force-sensing hands.

South Korea: Humanoid Project Powered by Domestic NPUs Launched

A humanoid robotics initiative was selected under the Ministry of Trade, Industry and Energy's "K-On-Device AI Semiconductor Project." Nota leads the consortium, LG Electronics oversees system integration, and Mobilint is responsible for the Korean-developed NPU. NPUs are specialized processors dedicated to AI computations.

Nota is tasked with lightweighting models that integrate vision, hearing, and motion for robots, compressing and pruning data to reduce cloud server reliance. While China accounts for 97% of global humanoid robot shipments, South Korea has chosen a strategy of coupling its semiconductor strengths with robotics.

Huawei Unveils Flagship In-House Kirin 9050 Pro Chip After Six-Year Hiatus

On September 7 in Guangzhou, Huawei unveiled its tri-fold smartphone, the Mate XT 2, powered by its in-house Kirin 9050 Pro processor. This marks the first time in six years, since the Mate 40, that Huawei has debuted a new flagship Kirin chip at a premier launch event.

Key specifications show a transistor density of 238 million per square millimeter, up 55% from the previous generation's 155 million. Single-core performance improved by 24%, multi-core performance increased by 52%, and overall device performance gained 42%.

The chip utilizes a 3D stacking architecture (Tao's Law / LogicFolding, 韜定律). Huawei explained that it increased density without migrating to a finer process node. Industry analysts interpret this as leveraging SMIC's existing 7nm-class (N+2) process while boosting performance through architectural design. The manufacturing process was not officially disclosed.

The NPU is based on the DaVinci architecture, running a 30-billion-parameter (2 billion active) Mixture of Experts (MoE) model directly on the device. MoE is an architecture that selectively activates only necessary parameters. Huawei stated that this represents the industry's first deployment of an on-device language model of this scale on a smartphone. The Mate XT 2 starts at 19,999 yuan and goes on sale September 12.

This marks a significant case of bridging performance gaps via circuit design amid semiconductor equipment restrictions, advancing the competition for on-device AI processors to a new stage.

Moore Threads Hits 20% Limit-Down on Major Shareholder Lockup Expiry

On September 7, 25.77 million shares held by major shareholders of Moore Threads (摩尔线程) were released onto the market, equivalent to 87.7% of the existing floating volume of 29.38 million shares. The stock closed down at the 20% limit of 415.49 yuan, pulling the company's market capitalization below 200 billion yuan.

Moore Threads surged 425% on its trading debut in December 2025. It climbed as high as 941 yuan within five trading days, but has now declined by more than half from that peak. First-half revenue reached 17.36 billion yuan, a 147% increase year-on-year, while net losses narrowed by 95.7%.

The primary hurdle remains software. Moore Threads GPUs depend on its proprietary MUSA software stack, which continues to trail Nvidia's CUDA due to shortages of mature drivers and optimized libraries. While Huawei's Ascend surges ahead in the domestic market, Moore Threads remains caught between inflated expectations and operational capabilities.

An additional 186 million shares are scheduled to unlock in December. Until then, revenue trajectory and the pace of software improvements will determine stock performance.

Telecom, Networks & Edge AI

MIIT Releases 15th Five-Year Plan for Information and Communications: 6G Commercialization Formally Codified

On September 7, the MIIT released the "15th Five-Year Plan for the Development of the Information and Communications Industry." Crucially, this marks the first time the government has explicitly codified the commercialization of 6G in an official policy document.

Key targets include reaching 4 trillion yuan in industry revenue and a 95% 5G subscriber penetration rate by 2030. The blueprint outlines development plans for 6G base stations, core network infrastructure, and 6G smartphones, as well as technologies integrating native AI capabilities across telecom networks.

Specified hardware devices include HarmonyOS-based 6G smartphones, smart glasses, smart home hubs, and brain-computer interfaces (BCIs). Integrated sensing, communication, intelligence, and computing (通感智算) technology was also designated as a core priority.

This development carries broader competitive implications for global markets.

Policy, Regulation & National Strategy

Exit and Entry Administration Regulations Take Effect September 15 (D-6)

The Exit and Entry Administration Regulations promulgated by the State Council will take effect in six days, on September 15. The core provision authorizes exit bans on individuals suspected of violating export control and technology transfer regulations. The exit prohibition period can last up to three years, as determined by the Ministry of Commerce.

Enforcement precedents have already emerged. Two co-founders of AI agent startup Manus have been barred from exiting China since March. The measure was imposed during an investigation into whether Meta's proposed \$2 billion acquisition violated Chinese foreign investment regulations. Meta subsequently abandoned the transaction.

The regulation serves as a legal mechanism to prevent the outflow of Chinese AI talent, while simultaneously elevating compliance and personnel risks for foreign enterprises recruiting Chinese technical talent. DLA Piper advised multinational corporations to audit the travel schedules of their Chinese employees in advance.

Inspur Bypasses US Sanctions Through Rebranding: \$5.6 Billion in Shipments

According to a September 6 report by The New York Times, Chinese server manufacturer Inspur, placed on the US Entity List in March 2023, continued operations by rebranding its California subsidiary as Aivres.

Between April 2024 and February 2026, Aivres exported \$5.6 billion worth of advanced technology products to Southeast Asia, including over \$3 billion in servers equipped with Nvidia Blackwell chips. End users reportedly included ByteDance and Alibaba.

Inspur reduced its equity holding in Aivres to 33%, dropping below the US 50% affiliate ownership rule threshold, while the entity continued operating with the same staff out of the same office facility.

This incident has intensified debate over the efficacy of export controls ahead of the mid-September US-China AI safety talks. As the US Congress and the Bureau of Industry and Security (BIS) move to close regulatory loopholes, export reviews targeting Southeast Asia are expected to broaden.

US-China AI Safety Dialogue Planned for Mid-September

According to Reuters, the United States and China are preparing for bilateral AI safety talks in mid-September. US Treasury Secretary Scott Bessent is slated to lead the US delegation, while Vice Premier He Lifeng or Politburo Standing Committee member Ding Xuexiang is being considered to head the Chinese side.

If convened, this would mark the first bilateral meeting dedicated exclusively to AI under the second Trump administration. The agenda is expected to address cyberattacks conducted by autonomous AI systems and allegations of model distillation involving foreign systems.

However, a White House official stated that "no AI meetings are currently scheduled," indicating plans have not been finalized. AI chips, electric vehicles, and rare earths could also feature in discussions at the upcoming Trump-Xi summit in Washington on September 24 (D-15). The Inspur sanctions evasion revelation could emerge as a critical variable shaping negotiations.

Commentary by Attorney Kyungjin Kim

The most striking takeaway from this week's developments in China is the velocity of regulatory evasion. Inspur simply rebranded to divert \$3 billion worth of Blackwell chips to Southeast Asia, while US authorities failed to block the channel for nearly three years. Export controls must be backed by rigorous enforcement if they are not to remain mere paper regulations.

Huawei's Kirin 9050 Pro demonstrates how performance can be enhanced through circuit architecture without relying on finer process nodes. It underscores once again that while sanctions can slow technological progress, they cannot halt it entirely.

Moore Threads hitting its 20% limit-down reflects the dual reality of China's AI chip market. Although revenue surged 147%, software support remains deficient. The chasm between market expectations and actual technical capability was laid bare in its stock price. Selling pressure will mount further when an additional 186 million shares unlock in December.

South Korea's industrial response is unfolding on two fronts. In memory semiconductors, CXMT has commenced mass production of HBM3E, narrowing the technological gap with Samsung Electronics and SK Hynix. In robotics, Nita, LG Electronics, and Mobilint have launched an initiative to develop humanoids powered by domestic NPUs.

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World Economy Top 10

World Economy Top 10 2026-09-09

Period: 2026-09-08 05:30 KST - 2026-09-09 05:30 KST

Today's Top 10 Highlights

1. Yemen's Houthi forces attacked Saudi Arabian oil facilities, sending international oil prices higher again. Drones and missiles targeted the 400,000-barrel-per-day Jazan refinery and southern energy infrastructure, and the Saudi Ministry of Energy stated that it halted operations at some facilities (September 8, Saudi Ministry of Energy).
2. International oil prices rose to a six-week high. On September 8, Brent crude climbed to near \$98 per barrel, and West Texas Intermediate (WTI) gained 2.78 percent to \$94.02, bringing its rise since the start of September to approximately 8 percent.
3. The Japanese yen touched a seven-month high near 154 yen per dollar. Market expectations that the Bank of Japan will raise its key interest rate by 0.25 percentage points to 1.25 percent at its September 17–18 meeting were almost fully priced in, and Takuji Aida, economic adviser to Prime Minister Takaichi, cited the possibility of a September rate hike (September 7–8).
4. China's August exports increased by 25 percent compared to a year earlier. Imports rose 28.2 percent, falling short of the 30 percent forecast, and the trade surplus expanded to \$119.1 billion from \$112.5 billion in July. Automobile exports surged 43 percent and semiconductor exports jumped 129.8 percent (General Administration of Customs of China, September 8).

5. Canada's retaliatory tariffs against the United States took effect. Starting at 12:01 a.m. U.S. Eastern Time on September 8, tariffs of 15 to 50 percent were imposed on roughly 700 U.S.-made items worth approximately \$20 billion, with tariffs on steel and aluminum increasing to 50 percent.

6. U.S. stock markets fell amid surging oil prices and Middle East tensions. On September 8, the Dow fell 1.18 percent to 52,786.07, the S&P 500 slipped 0.58 percent to 7,673.52, and the Nasdaq declined 0.32 percent to 26,421.41.

7. The U.S. 10-year Treasury yield maintained elevated levels at 4.79 percent. Strong August employment figures and inflation concerns fueled by rising oil prices supported yields (September 8).

8. International gold prices dropped. On September 8, spot gold fell 1.60 percent to \$4,404.90 per ounce as expectations for rate hikes following robust employment numbers put downward pressure on the metal.

9. European equity markets closed flat. On September 8, the pan-European STOXX 600 index was virtually unchanged at 649.8, while the Euro STOXX 50 rose 0.1 percent; German Bund yields rose alongside a sharp surge in natural gas prices.

10. Novartis shares plummeted approximately 9 percent. While the new heart drug pelacarsen lowered bad cholesterol, it failed to reduce cardiovascular events, making it the biggest decliner on the STOXX 600 on September 8.

Market Indicators

U.S. markets closed on September 8 with the Dow at 52,786.07 (-1.18 percent), the S&P 500 at 7,673.52 (-0.58 percent), and the Nasdaq at 26,421.41 (-0.32 percent). The U.S. 10-year Treasury yield was 4.79 percent. The yen traded near 154 per dollar, reaching a seven-month high. The Volatility Index (VIX) rose to 15.72. The European STOXX 600 ended flat at 649.8.

Central Banks and Policy

The yen strengthened as expectations grew for a Bank of Japan rate hike on September 17–18. Projections persisted that the European Central Bank will raise interest rates by 0.25 percentage points at its September 10 meeting. The U.S. Federal Reserve's next meeting is scheduled for September 15–16. Canada's retaliatory tariffs against the U.S. went into effect, taking U.S.-Canada trade friction to a deeper level.

Commodities and Energy

Following the Houthi strike on Saudi oil facilities, Brent crude climbed to near \$98, and WTI rose to \$94.02. European natural gas hovered around its highest levels in over three years. Gold declined 1.60 percent to \$4,404.90 per ounce.

Key Watchpoints for the Next 24 Hours

Saudi Aramco's announcement regarding the extent of facility damage will decide the direction of oil prices. Treasury yields may fluctuate ahead of the U.S. August Consumer Price Index release (local time September 11). The European Central Bank's September 10 decision and rate-hike signals from the Bank of Japan will affect exchange rates.

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International Conflict Briefing

International Conflict Briefing **2026-09-09**

As of: 2026-09-08 09:20 KST - 2026-09-09 09:20 KST

Today's Key Developments

1. Russian forces resumed airstrikes on Kyiv immediately after the conclusion of the US special envoy's visit.
2. The Qatari government urged the unconditional reopening of the Strait of Hormuz.
3. The South Korean Ministry of National Defense dispatched a working-level survey team to assess the security of the Strait of Hormuz.

Frontline Changes

The Russian military leadership extended the deadline for the complete capture of Donbas to March 2027. This is analyzed as a measure resulting from difficulties advancing in Donetsk Oblast.

Myanmar military junta drones attacked a temple and civilian homes in Mandalay. Civilian casualties resulted from the attack on the temple.

Civilian Casualties and Humanitarian Situation

Russia's airstrikes on Kyiv damaged a TV station building and residential areas. 5 people were killed and 70 were injured in the airstrikes.

4 people, including a monk and a child, were killed in the Myanmar Mandalay drone airstrikes.

Diplomacy, Sanctions, and Military Support

The Ukrainian Defense Minister stated that contracts for procuring around 1,000 Patriot missiles are under way, utilizing EU loans and partner support.

The Qatari Foreign Minister discussed measures for safe passage through the Strait of Hormuz with the Chinese side in Beijing.

The leaders of China and Russia sent congratulatory messages to Kim Jong Un on the 78th anniversary of the founding of the North Korean regime.

The South Korean Ministry of National Defense sent a working-level survey team to the UAE to assess the security situation in Hormuz. No decision has been made on troop deployment.

Watchpoints for the Next 24 Hours

Observe the deployment status of additional air defense capacity following Russia's resumption of airstrikes on the Ukrainian capital.

Monitor whether passage through the Strait of Hormuz resumes following maritime security consultations between Qatar and China in the Middle East.

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Global Incidents and Disasters Briefing

Global Incidents and Disasters Briefing 2026-09-09

Based on: 2026-09-08 07:40 KST to 2026-09-09 07:40 KST. 10 items.

Today's Summary

1. Hurricane Lowell approached Kauai Island, Hawaii, United States, causing power outages and road flooding.
2. In the Democratic Republic of the Congo, deaths from the Ebola outbreak exceeded 3,200.
3. Nagoya, Japan, was hit by torrential rain exceeding 100 millimeters per hour, prompting evacuation orders.

Heavy Rain, Floods, Typhoons

1. Hurricane Lowell strikes Hawaii, United States, causing power outages

Occurred September 8, 2026, 21:00 KST (local time September 8, 2:00).

Category 1 Hurricane Lowell passed offshore of Kauai Island, Hawaii, United States. Following earlier reports, damage from strong winds and heavy rain continues. 50,400 households lost power across Hawaii. Major roads on Kauai Island were blocked by mud and water. Hawaii authorities maintained a state of emergency and ordered schools closed.

2. Record rainfall in Nagoya, Japan, halts subway service and causes flooding

Occurred September 8, 2026, 18:00 KST (local time September 8, 18:00).

Nagoya, Aichi Prefecture, Japan, was hit by rainfall of 104.5 millimeters per hour. This was the heaviest rainfall on record for Nagoya. The highest-level

flood warning was issued for the Shonai River basin. Subway service in Nagoya was suspended and roads were flooded. Aichi Prefecture authorities said 4 people were injured.

Accidents

3. Cabo Verde bus crash prompts road safety inspection

Confirmed September 8, 2026 KST (local time September 8). This is a follow-up on the bus crash on Fogo Island, Cabo Verde, reported on the 7th. A minibus fell 30 meters into a ravine, killing 25 and injuring 14. The government of Cabo Verde declared a period of national mourning. The government is inspecting the safety of the accident road and reviewing restrictions on large vehicle traffic.

4. Bolivia military base explosion death toll rises to 9

Announced September 8, 2026 KST (local time September 8). Casualties rose from the explosion at an army ammunition depot in Viacha, La Paz Department, Bolivia. Following earlier reports, additional casualties were confirmed. Bolivia's Ministry of Defense said the death toll rose to 9, with 84 injured. The Bolivian government declared national mourning and is reviewing safety protocols.

5. Small plane crash in California, United States, kills family of 4

Confirmed September 8, 2026 KST (local time September 8). A small plane crashed shortly after takeoff in Fresno, California, United States. All 4 family members aboard the plane died. Two children died at the scene, and the parents, who were taken to hospital, later died. The US National Transportation Safety Board is investigating the exact cause of the aircraft failure.

6. Factory explosion and fire in Gyeongju, North Gyeongsang Province, kills 1

Occurred September 8, 2026, 11:26 KST (local time September 8, 11:26). An explosion and fire occurred at a waste treatment factory in Gyeongju, North

Gyeongsang Province, South Korea. The accident occurred while machinery was being dismantled with an oxygen cutter. Fire authorities said 1 person died and 2 were seriously injured. Police and fire authorities are investigating the cause through forensic examination.

7. Head-on collision of intercity buses in Odesa Region, Ukraine

Occurred September 8, 2026 KST (local time September 8). Two intercity buses collided on a road in Myzhyrynske, Odesa Region, Ukraine. Ukrainian police said 2 women died and 25 were injured. Among the injured were 5 children. Police arrested and are investigating the driver who crossed the center line.

8. Identities confirmed for victims of cargo plane crash at Miami Airport, United States

Announced September 9, 2026 KST (local time September 8). Investigation continues into the cargo plane crash at Miami Airport, Florida, United States. The 5 victims of the accident reported on the 7th were occupants of a cleaning van. The 2 pilots who had been under treatment recovered and were discharged. US authorities recovered the black box and are investigating the cause of the accident.

Infectious Disease

9. Ebola outbreak spreads in Democratic Republic of the Congo, hospital bed shortage warned

Announced September 8, 2026 KST (local time September 8). The Ebola outbreak continues to spread in Ituri Province and other areas of the Democratic Republic of the Congo. The World Health Organization said there have been 6,686 cases and 3,226 deaths. There is a shortage of 5,000 local medical staff and 1,600 treatment beds. The World Health Organization requested international support to control the outbreak.

10. Measles cases in Wisconsin, United States, rise to 151

Announced September 8, 2026 KST (local time September 8). The measles outbreak continues to expand in southwestern Wisconsin, United States. The Wisconsin Department of Health Services said cumulative cases rose to 151. Health authorities recommended vaccination and self-isolation for unvaccinated individuals.

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