

KIMKJ.COM DAILY BRIEFING

2026 · 09 · 18

Friday, September 18, 2026

AI, Economy, and Global Conflict Daily Briefing

- 1 China AI, Robotics and Semiconductors In-Depth Briefing
- 2 World Economy Top 10
- 3 International Conflict Briefing
- 4 Global Incidents and Disasters Briefing

This edition omits: Global AI News Briefing. Available sections are published first.

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China AI, Robotics and Semiconductors In-Depth Briefing

China AI, Robotics and Semiconductors In-Depth Briefing 2026-09-18

Friday, September 18, 2026

Top 5 Key Developments Today

1. Huawei unveiled the Ascend 960 SuperNode at Huawei Connect 2026. A single cluster of 4,096 chips delivers 8 EFLOPS of FP8 compute power. The launch of the 960DT has been moved up by three quarters to Q1 2027.
2. With the Trump-Xi summit six days away, Commerce Secretary Howard Lutnick ruled out concessions on AI chip export controls.
3. UBTECH began deliveries of its consumer humanoid robot U1 series on September 16, with pre-orders surpassing 13,000 units.
4. Unitree Robotics shares surged over 7% on September 17, pushing its market capitalization to 203 billion yuan and reclaiming the 200 billion yuan mark within a month of listing.
5. Huawei introduced the OceanStor M900, dedicated storage for agent inference that accelerates large-scale inference via a petabyte-scale shared KV cache.

Chinese AI Models & Platforms

Huawei Connect 2026 Agent Strategy

Huawei Cloud announced an agent-centric hybrid cloud strategy on September 17. An agent is an AI software system capable of autonomous

judgment and task execution. Anthony Gu, President of Huawei Hybrid Cloud, described agents as a new category of digital employees.

The analysis points to a fundamental shift in the entity executing work. The paradigm is transitioning from humans operating software applications to humans collaborating with agents, and onward to autonomous agent-to-agent collaboration.

Huawei Cloud Stack is structured to allow enterprises to develop and operate agents within their on-premises data centers. It integrates compute and storage by linking Ascend AI processors, Kunpeng general-purpose processors, and OceanStor storage arrays.

Strategic Implications: The Chinese cloud market is being restructured around agent infrastructure.

(Sources: Huawei Cloud, PR Newswire, 2026-09-17)

Robotics · Humanoids · Embodied Intelligence

UBTECH Begins Deliveries of U1 Humanoid Robot

UBTECH began shipping its consumer humanoid robot U1 series on September 16. Orders have exceeded 13,000 units since the announcement on June 30. The robot features 88 degrees of freedom (DoF). The company stated that it replicates 90% of fundamental human movements and recognizes more than 20 emotional expressions with over 90% accuracy.

Pricing is set across three tiers: Lite at 119,800 yuan and Pro at 169,800 yuan. The Ultra version is priced at 990,000 yuan for the male configuration and 880,000 yuan for the female configuration. Because the initial pre-order deposit was set at 3,000 yuan, final conversion rates remain to be observed.

Strategic Implications: China is moving first to open the consumer humanoid robotics market.

(Sources: NetEase, Xinhua, Sina Finance, 2026-09-16)

Unitree Reclaims 200 Billion Yuan Market Capitalization

Unitree Robotics shares gained more than 7% intraday on September 17, closing at 501.88 yuan with a market capitalization of 203 billion yuan. After climbing to 444.9 billion yuan on its August 19 debut, the valuation had dipped below 200 billion yuan on September 10.

Unitree posted first-half revenue of 1.15 billion yuan and returned to operating profitability. Humanoid robot shipments reached 5,900 units in the first half, ranking third globally. Share prices continue to fluctuate between valuation concerns and operating performance verification.

Strategic Implications: Market capitalizations of leading Chinese humanoid robotics firms are exhibiting heightened volatility. While technological potential is recognized, mass-production profitability remains unproven.

(Sources: 21st Century Business Herald, Sina Finance, 2026-09-17)

AI Semiconductors & Computing Infrastructure

Huawei Ascend 960 SuperNode Unveiled

Huawei unveiled the Ascend 960 SuperNode on September 17, the opening day of Huawei Connect 2026. The announcement was presented by David Wang (Wang Tao), Deputy Chairman of the Board and Rotating Chairman.

A single SuperNode scales to 4,096 chips. Computing capacity reaches 8 EFLOPS on FP8 precision, with total HBM capacity of up to 1 PB. The system employs the Lingqu interconnect architecture to cluster multiple chips into a single unified fabric. The Hi-ONE optical engine interconnects the 4,096 chips at high speed, achieving a round-trip latency of 2 microseconds.

This is the first SuperNode to implement Near-Package Optics (NPO), positioning optical components directly adjacent to the silicon package. In place of 48,000 conventional 800G optical transceivers, it utilizes 5,500 Hi-ONE

modules. This design reduces system power consumption by more than 550 kW and doubles mean time between failures.

Product release timelines were moved forward. The launch of the 960DT was accelerated by three quarters to Q1 2027, while the 960PR was advanced by one quarter to Q3 2027. Both models double the performance of the prior generation.

David Wang stated that Huawei plans to iterate the Ascend architecture by one generation annually, with the Ascend 970 scheduled for 2028 and the Ascend 980 for 2029. At present, more than 1,000 sets of Ascend 910C SuperNodes have been deployed across over 370 enterprise clients, and the Ascend 950 has entered large-scale commercial deployment.

Strategic Implications: Huawei is bridging individual chip performance deficits through full-system integration. By linking thousands of chips with optical engines, the architecture is designed to support the training of 100-trillion-parameter frontier models, pursuing the same system-level trajectory as Nvidia's NVL72. This development could also influence high-bandwidth memory (HBM) demand for SK Hynix.

(Sources: 21st Century Business Herald, Sina Finance, DigiTimes, WCCFTech, 2026-09-17)

OceanStor M900 AI Memory Storage

On the same day, Deputy Chairman David Wang introduced the OceanStor M900. It is a purpose-built storage appliance designed to allow multiple processors to share large-scale key-value (KV) caches during agent inference. KV caching serves as temporary context memory where an AI system retains previously computed values.

Through the UnifiedBus network, it connects petabyte-scale KV caches seamlessly. Huawei stated that by combining heterogeneous storage media and optimizing caching algorithms, SSD service endurance has been extended by a factor of 16.

Strategic Implications: As the AI inference market expands, storage architectures are undergoing a fundamental redesign. This dynamic is generating new demand across the memory sector, including for Samsung Electronics and SK Hynix.

(Sources: HPCwire AIwire, PR Newswire, 2026-09-17)

Enflame Surges 188% on First Day of Shanghai Trading

AI chipmaker Enflame (Suiyuan Technology), in which Tencent holds a 17.95% equity stake, debuted on the Shanghai Stock Exchange STAR Market on September 11. Priced at 142.18 yuan per share, the initial public offering raised 6.12 billion yuan. The stock surged 188% on its first day of trading, bringing market capitalization to approximately 185 billion yuan.

For 2025, the company reported revenue of 990.2 million yuan and a net loss of 1.16 billion yuan. The firm has set a financial target to reach operating break-even between 2026 and 2027.

Strategic Implications: Following Huawei and Cambricon, Enflame has now entered the public equity markets. China's domestic AI semiconductor ecosystem is securing expanding capital market backing, reflecting an import-substitution push driven by concurrent growth across multiple domestic suppliers rather than reliance on a single vendor.

(Sources: Caixin Global, Bloomberg, The Standard, 2026-09-11)

Telecommunications · Networks · Edge AI

Huawei Hi-ONE: Industry's First Mass-Produced NPO Optical Engine

Huawei unveiled its next-generation optical interconnect product, Hi-ONE, at Huawei Connect 2026. It is the industry's first commercial product built on Near-Package Optics (NPO) technology. A single engine delivers a bidirectional transmission throughput of 7.2 Tbps.

Integrated into the Ascend 960 SuperNode, it replaces 48,000 legacy 800G optical transceivers with 5,500 modules, reducing aggregate power consumption by over 550 kW.

Strategic Implications: Interconnect architectures inside AI data centers are transitioning from electrical signaling to optical solutions.

Kunpeng SuperNode Upgrade

Huawei also upgraded its Kunpeng SuperNode platform. Utilizing the Lingqu all-optical interconnect, it networks up to 4,096 compute nodes into a 256 TB unified memory pool. The Kunpeng computing ecosystem currently encompasses 4.16 million software developers globally.

(Sources: Huawei, Manila Times, 2026-09-17)

Policy · Regulation · National Strategy

No new policy directives were promulgated over the past 24-hour cycle. A signed article by Minister of State Security Chen Yixin published earlier this week remains the primary policy signal.

Chen characterized artificial intelligence as a threat to political security. He warned that external actors could manipulate public opinion through deepfakes and coordinated bot networks, while reaffirming the principle that the Party maintains absolute governance over data assets.

The remarks were issued ahead of the bilateral summit on September 24. They represent an explicit declaration, domestically and internationally, of the security apparatus's intent to enforce stringent oversight over AI. The strategic posture remains clear: Beijing intends to reinforce internal regulatory control while concurrently participating in international AI safety dialogues with the United States.

(Sources: Bloomberg, HKFP, Sina News, 2026-09-14)

Trump-Xi Summit: Six Days Out

The Washington summit scheduled for September 24 is six days away. U.S. Commerce Secretary Howard Lutnick explicitly ruled out concessions on semiconductor export controls, stating that the administration will not revisit proposals that were previously rejected.

Beijing's primary objective focuses on securing relief from semiconductor export restrictions. Washington has drawn a firm boundary, designating export controls non-negotiable. The remaining operational friction centers on remote cloud access routed through data centers in Southeast Asia. The U.S. Congress is seeking to eliminate this channel through the Remote Access Security Act (RASA).

Both governments agreed to hold a preliminary AI safety dialogue prior to the summit, though timing remains unscheduled. U.S. Treasury Secretary Scott Bessent and Chinese Vice Premier He Lifeng are reported as prospective delegation leaders.

Strategic Implications: Absent export control concessions, Chinese enterprise dependence on Huawei's Ascend lineup will deepen. SK Hynix's HBM shipments to Chinese clients will remain contingent on the exact regulatory scope of sanctions, with the summit outcome serving as a key benchmark.

(Sources: Fox News, Brownstein, US News, Digital Journal, 2026-09-17)

SK Hynix-Intel Discussions on Ohio Memory Production

SK Hynix is reviewing options to manufacture memory chips in the United States by leasing capacity at Intel's Ohio facility. Reuters reported the discussions on September 16, citing multiple sources familiar with the negotiations. The parties are also discussing the formation of a joint venture alongside Intel and major cloud service providers.

If realized, this would mark the first instance of a South Korean semiconductor manufacturer producing memory silicon within the continental United States. The initiative is structured to mitigate tariff risks and insulate against supply chain disruptions. SK Hynix stated that no commercial agreement has been finalized.

Strategic Implications: The United States' campaign to onshore the AI semiconductor supply chain has expanded into the memory segment. Because DRAM is classified as a national core technology in South Korea, transferring manufacturing or design assets overseas requires formal regulatory review under the Act on Prevention of Divulgence and Protection of Industrial Technology.

(Sources: Reuters, Quartz, Tom's Hardware, DigiTimes, 2026-09-16)

Apple Siri AI Excludes China

Apple launched a beta version of Siri AI alongside iOS 27 on September 14. Initial deployment is restricted to English-speaking markets, excluding mainland China and the European Union. Apple stated that the service will not be made available in China while it completes compliance with domestic regulatory mandates, providing no specific timetable or phased rollout schedule.

Strategic Implications: AI feature rollouts from U.S. Big Tech are fracturing along regional regulatory borders. In China, market dominance by domestic platform operators such as Alibaba and Baidu is further solidifying.

(Sources: Engadget, Dataconomy, MacObserver, 2026-09-14)

Commentary by Attorney Kyung-jin Kim

What Huawei demonstrated at Connect 2026 is not merely the raw compute performance of an individual chip, but complete full-system architectural design. By clustering 4,096 chips with 2-microsecond round-trip latency and mitigating power limits through optical engines, Huawei is pursuing the same

architectural paradigm as Nvidia's NVL72. The underlying strategy is clear: compensate for individual silicon performance gaps through system-level co-design.

Secretary Lutnick's refusal to concede on semiconductor controls reflects both geopolitical leverage and market reality. More than 1,000 Ascend SuperNode clusters are already in production deployment, Enflame has completed its public listing, and the domestic market share of Chinese accelerators continues to rise. In practice, export restrictions have accelerated China's timetable for technological self-sufficiency.

Discussions regarding SK Hynix potentially producing memory in the United States illustrate the wider ripple effects of this shifting geopolitical architecture.

[Source Links]

- Huawei Ascend 960 SuperNode Details

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World Economy Top 10

World Economy Top 10 2026-09-18

Reference Period: 2026-09-17 05:30 KST - 2026-09-18 05:30 KST

Today's Top 10 Key Highlights

1. International oil prices fell for a second day. On September 17, Brent crude fell \$1.01 to \$104.82 per barrel, and West Texas Intermediate fell 52 cents to \$101.91. Concerns over supply disruptions eased as Saudi Arabia announced plans to restore half of the East-West pipeline shut down by drone strikes within days and fully restore it within six weeks, while opening detour export routes through ship-to-ship transfers off Oman.
2. The U.S. 10-year Treasury yield fell by about 5 bps to 4.94%. This came as the market absorbed the Federal Reserve's first rate hike on September 16 and inflation concerns eased somewhat following the drop in oil prices.
3. U.S. stock markets rebounded. On September 17, the Dow rose 0.61% to 51,778.04, the S&P 500 rose 1.14% to 7,637.76, and the Nasdaq rose 1.69% to 26,418.30. Treasury yields and oil prices fell together, reversing the previous day's losses.
4. The Bank of England held its benchmark interest rate at 3.75% for the sixth consecutive time. On September 17, 6 out of 9 Monetary Policy Committee members voted to hold while 3 advocated for a hike, and they also decided to slow the pace of bond sales. The Bank of England warned that inflation could exceed 4% in early 2027.
5. The Eurozone's final August consumer price index came in at 3.2%. According to Eurostat's announcement on September 17, it was revised down from the flash estimate of 3.3%, with energy rising 14.3% from a year earlier. Core inflation was 2.4%, and services inflation was 3.0%.

6. Semiconductor stocks rose. On September 17, Micron rose by more than 5%, and remarks by Intel's CEO stating that memory demand remains robust and prices will rise further drove the rally.

7. U.S. August housing starts fell 2.6% month-over-month to an annualized rate of 1,275,000 units. According to the Census Bureau on September 17, single-family home starts increased, but multi-family starts of 5 units or more plummeted by 22.5%, and building permits also decreased by 2.7%.

8. Gold prices rebounded. On September 17, spot gold rose to about \$4,311 per ounce, and silver rose 2.9% to about \$65.5. After dipping immediately following the Fed's hike, they bounced back on bargain hunting and falling oil prices.

9. The Central Bank of Brazil lowered its benchmark interest rate to 13.75%. The decision, marking its fifth consecutive cut, was released on the night of September 16 local time.

10. U.S. diesel prices hit an all-time high of \$6.29 per gallon. This was the result of overlapping Middle East supply disruptions and refining burdens on September 17.

Market Indicators

U.S. stock markets rebounded to close with the Dow at 51,778.04, the S&P 500 at 7,637.76, and the Nasdaq at 26,418.30. The U.S. 10-year Treasury yield fell 5 bps to 4.94%. Spot gold rose to about \$4,311 per ounce, and silver was about \$65.5.

Central Banks and Policy

The Bank of England held its rate at 3.75% for the sixth time and slowed the pace of bond sales. Brazil cut its benchmark interest rate to 13.75% for the fifth time. The Eurozone's final August inflation was 3.2%, exceeding the European Central Bank's 2% target.

Commodities and Energy

Brent crude fell to \$104.82 and West Texas Intermediate fell to \$101.91, declining for a second day. Saudi Arabia's pipeline restoration plan and detour exports via Oman relieved supply concerns. U.S. diesel prices reached an all-time high of \$6.29 per gallon.

Points to Watch Over the Next 24 Hours

Watch whether the Bank of Japan raises interest rates to 1.25% at its September 18 meeting. If raised, it will be the highest level in about 31 years. Also check Norway's central bank decision and U.S. weekly initial jobless claims.

[Source Links]

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- <https://www.cnn.com/2026/09/17/treasury-yields-move-lower-after-fed-kicks-off-hiking-cycle.html>
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International Conflict Briefing

International Conflict Briefing 2026-09-18

Key Developments Today

1. The Polish Prime Minister warned that Russia is preparing hybrid attacks against countries supporting Ukraine.
2. A UN fact-finding mission raised the possibility of U.S. war crimes regarding civilian damage caused by airstrikes in Iran.
3. Five people were killed in mutual armed conflicts between Saudi Arabia and Yemen's Houthi rebels.

Frontline Changes

The General Staff of the Ukrainian Armed Forces announced that it struck an S-400 air defense battery in Russia's Bryansk Oblast. Ukrainian forces also attacked an oil refinery in Yaroslavl with drones. The Polish military scrambled fighter jets in the aftermath of airstrikes in western Ukraine. In Myanmar, a junta military column faced strong resistance while moving toward a tactical base in Hpapun, Karen State.

Civilian Casualties and Humanitarian Situation

UNICEF stated that more than 57,000 children were displaced due to fighting along Yemen's Red Sea coast. Civilian casualties occurred in the Jazan region of Saudi Arabia due to an attack by Houthi rebels. Reports of resident deaths and injuries were also recorded in Ukraine's Zaporizhzhia and Dnipropetrovsk Oblasts due to Russian drone airstrikes.

Diplomacy, Sanctions, and Military Support

Foreign Minister Cho Tae-yul is visiting the United States to discuss security in the Strait of Hormuz and North Korea policy. The United States and Poland stated that they have made progress in discussions regarding the construction of a new U.S. military base. Ukraine received the remains of 252 fallen soldiers from Russia.

24-Hour Watchpoints

Additional airstrikes and air defense responses along the Poland-Ukraine border area should be closely monitored. Border clashes between Saudi Arabia and Yemen's Houthis as well as maritime safety in the Red Sea need to be observed. Further military tensions in the Middle East following the release of the UN report on airstrikes in Iran need to be examined.

[Source Links]

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- Generated Time: 2026-09-18 09:30 KST

Global Incidents and Disasters Briefing

Global Incidents and Disasters Briefing **2026-09-18**

Basis: 2026-09-17 07:40 KST to 2026-09-18 07:40 KST. 10 items.

Today's summary

The death toll from the gold mine collapse in Sudan rose to 82. The Ebola death toll in the Democratic Republic of the Congo reached 3,475. A US Air Force fighter jet crashed in the state of Michigan.

Earthquakes and volcanoes

1. Magnitude 6.5 earthquake off the Aleutian Islands, Alaska, United States

The event occurred at 23:19 KST on September 17, 2026 (14:19 UTC local time). An earthquake struck the waters off the Aleutian Islands in Alaska, United States. The magnitude was 6.5 and the focal depth was 108.4 kilometers. Casualties from the quake are still being tallied. GDACS issued a green alert for the earthquake.

Heavy rain, floods and typhoons

2. Typhoon No. 25 Doujuan forms and is forecast to move north toward the Tokyo metropolitan area of Japan

The event occurred at 21:00 KST on September 17, 2026 (21:00 JST local time). Typhoon Doujuan, the 25th typhoon of the season, is moving north while maintaining its strength near Iwo Jima in the Ogasawara Islands of Japan. The typhoon has a central pressure of 981 hectopascals. Casualties and damage to

facilities are still being tallied. The US Joint Typhoon Warning Center continues to track the storm's path.

3. About 16,000 homes flooded by strong winds and heavy rain in northern Vietnam

The event occurred at 19:30 KST on September 17, 2026 (17:30 local time). Heavy rain in northern Vietnam flooded 16,310 homes. In the Da Bac area of Phu Tho province, Vietnam, three people died in a landslide. In Thanh Hoa province, homes were destroyed. According to Vietnamese authorities, three people died. About 25,000 hectares of farmland were submerged. The Vietnamese government is evacuating residents from at-risk areas.

Wildfires

4. Hydra wildfire spreads in Bosque County, Texas, United States

The event occurred at 12:00 KST on September 17, 2026 (22:00 local time on September 16). The Hydra wildfire spread through Bosque County, Texas, United States. The fire burned 1,100 acres of woodland. Casualties are still being tallied. Texas authorities issued an evacuation order for residents of the city of Meridian, which was later lifted, and most residents have returned home.

Accidents

5. Death toll from gold mine collapse in West Kordofan, Sudan, rises to 82

The event occurred at 18:00 KST on September 17, 2026 (11:00 local time). Search operations continue at the site of the gold mine collapse in El Nahud, West Kordofan, Sudan. The death toll was updated to 82 as the search for those trapped continues. According to Sudanese authorities, 82 people died and 50 were injured. No professional rescue teams have been deployed, and residents continue the search underground using hand tools.

6. Death toll from salt plant explosion in Veracruz, Mexico, rises to five

The event occurred at 21:00 KST on September 17, 2026 (06:00 local time). The death toll from the explosion at a salt plant in Veracruz, Mexico, has risen. Injured people who were being treated in hospital died, updating the toll to five. According to state authorities in Veracruz, five people died. Civil defense authorities in Veracruz extinguished the fire and moved 238 residents from five nearby villages to shelters.

7. North Korean towed vessel sinks in the East Sea, one in cardiac arrest and one missing

The event occurred at 07:45 KST on September 17, 2026 (03:00 local time). A vessel being towed by a North Korean cargo ship sank in waters 104 kilometers west-southwest of the Oki Islands in Shimane Prefecture, Japan. Four crew members aboard the vessel fell into the sea. Of the three who were rescued, one was in cardiac arrest and one remains missing. The Japan Coast Guard has deployed patrol boats and aircraft to search for the missing crew member.

8. US Air Force F-16 fighter jet crashes in Michigan, United States

The event occurred at 02:00 KST on September 18, 2026 (13:00 local time on September 17). A US Air Force F-16 fighter jet crashed in Blair Township, Michigan, United States. The pilot successfully ejected before the crash. According to the US Air Force, there were no deaths. An evacuation order was issued for residents within 1.6 kilometers of the crash site.

9. Small plane crash in Lee County, South Carolina, United States, kills pilot

The event occurred at 22:00 KST on September 17, 2026 (09:00 local time). A small plane crashed on a road in Lee County, South Carolina, United States. The pilot, who was alone on the plane, died. According to the county sheriff's office, one person died. The US Federal Aviation Administration is investigating the cause of the crash.

Infectious disease

10. Cumulative Ebola deaths in the Democratic Republic of the Congo reach 3,475

The event occurred at 18:00 KST on September 13, 2026 (11:00 local time). The Ebola outbreak continues in the Democratic Republic of the Congo. Cumulative confirmed cases stand at 7,200 and deaths at 3,475. According to health authorities in the Congo, confirmed cases number 7,200. The World Health Organization has called for vigilance to prevent further spread of the disease.

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