

# Thoughts on Coming Apart and the Coming Great Reset



Turning and turning in the widening gyre  
The falcon cannot hear the falconer

**Kit Webster**

## Themes and Theses

### Why I'm Contemplating Out Loud

(Initially formulated in the early 90s, following decades of reading history, philosophy, religion, psychology and a lot of contemplation, particularly on the subject of cycles. In the end, this is a relatively straightforward story about human nature and of history rhyming.)

The US will enter a period of crisis in the early 2000s. In the late 90s, I incorporated Strauss' and Howe's terminology of the Fourth Turning (without incorporating their generations paradigm) and agreed with Howe that the end stage of the crisis began with the Great Financial Crisis and would last into the early 2030s. We are now at the beginning of the end stage of the crisis.

The crisis will be serious and could be existential.

**Internal strife will increase, up to and including secession and civil war. International conflicts will increase as the vacuum created by the weakening of the US is filled by other players.**

**There will be many threads to the crisis, but the primary thread will be debt, deficits and entitlements. Other factors include, eg, demographics, a loss of meaning and myth and a loss of self-discipline.**

**Politics will move leftward as citizens look for some refuge from the chaos. The US will become increasingly susceptible to a (man) on a white horse, who can come from either the left or the right.**

**Inflation, as the most likely way to address debt since austerity is not politically acceptable, will significantly lower standards of living, exacerbating the civil crises.**

**Eventually, the dollar will be inflated away and lose its reserve status. Once the old rot is cleared out, and assuming continuity, there will be the basis for the establishment of a new order.**

**There will be what Strauss and Howe calls a First Turning . It will be constructed out of the physical infrastructure, wealth, energy sources, thoughts and values in the culture at the time. At this point in time, those components are unknowable. We can anticipate that the next future will be increasingly chaotic. We can anticipate that there will be destruction, and then reconstruction from some level. We cannot yet anticipate the form of the reconstruction or the level from which it will begin.**

**(Added in the early 00s) While humans are contributing to global warming, policies implemented to address manmade global warming will create a significant energy crisis, probably toward the end of the Fourth Turning.**

**(Added around 2020) The loss of faith by our youth in our founding principles means that the new order will at least partially be based on new principles. As yet, I have no visibility as to what those principles might be.**

**(Added in 2023) The lowering / elimination of standards in education, the judiciary, law enforcement, the military and other segments of our**

society will create a population unable to adequately comprehend, do or respond to the challenges of democracy and culture.

(Added in 2025) China has won - at least for the next 5-10 years. The US is dependent on China for the materials it uses to create defense items. We literally cannot fight China without China's help. China's industrial base is impressive; the US has to rebuild. China is out-innovating the US. China is turning out more engineers and scientists than the US by far. This does not mean that China does not face challenges - demographics perhaps being its primary challenge. The US military remains stronger than China's, but in an age of drone warfare, that statement means less than it has historically. The US still has bargaining chips and will need to use them to maintain any kind of status quo.

(Added in 2025) AI has the potential to profoundly affect human culture. However, AI faces several significant hurdles, including the demand for massive amounts of electricity, which may not be available, and a cultural revolt against its existence. Since it could be existential, and since China is pursuing it, the US has no alternative, at least in the short term.

(Added in 2026) Maneuvering for control of critical materials will be a primary driver of geopolitics for at least the next decade.

# **Picking Your Favorite Menendez Brother**

**April 24, 2026**

## **Quotes to Contemplate**

In 100 years we have gone from teaching Latin and Greek in high school to teaching Remedial English in college. — Joseph Sobran

## **Summary of Primary Thoughts To Contemplate In This Issue**

When it comes to Israel vs Hamas - a pox on both their houses ... and on ours, too.

The software revolution is real, and astounding.

The Iran stalemate continues as the effects slowly accumulate around the globe.

We are permeated with corruption and grift.

## **Markets**

Updated charts

Charts not updated.

Not much to say until the war is over.

## **Picking Your Favorite Menendez Brother**

When I was a child, Israel was a place that existed in the Bible and in Sunday sermons in church. We read about it in Sunday School. It was no different than, say, Tasmania, but with people who were always fighting somebody and disobeying Yahweh. There were great stories of creation, floods, plagues and the little guy beating the big guy. For me the best stories were the ones about the exodus from Egypt – plagues, parting seas, burning bushes and golden idols. Somehow, this was all important because Jesus was a Jew, who lived in Judea, which used to be a part of Israel but by then was part of the Roman Empire. Jesus was very important to me for reasons I could not quite describe, but Israel was just a place like England, with its Knights of the Round Table and Admiral Nelson, always invading or being invaded by Scotland and France.

My first encounter with modern Israel was the movie, Exodus, which came out in 1960, when I was 15. I was very moved by the movie and the words of its theme still resonate: “This is my land, God gave this land to

me.” Exodus was about the movement to establish a modern Israel. I thought, “Good for them,” and moved on.

We had one Jew in our high school class in suburban Atlanta, and nobody cared, one way or the other. Later in life, my best friend for much of my early- and mid-adulthood was a Jew and I didn’t even know it until Beth told me one day (her milieu in New York was Jews, Irish and Italians).

Later, as I matured, lost my faith, and began to try to understand why things were the way they were, I began actually thinking about Jews, discrimination, the diaspora, the Holocaust, and the establishment of Israel. Since I was no longer a Christian, I was more objective than I would have been otherwise, although I was never a big Old Testament guy.

It seems to me that the whole modern-Israel thing rests on three foundations:

- Yahweh is God and therefore his gift of Israel to Jews must be respected.
- There was a great deal of cumulative guilt and sympathy resulting from the Holocaust.
- Jews, ironically, punch above their weight in the Western world. The entire world population of Jews is around 15 million people – about the size of the cities of Mumbai and Beijing.

The first is up for debate, given the various religions of the world.

The second is real and deep and profound, although the passage of time has diluted it significantly. It will basically be gone in another decade or so, much like Pearl Harbor, “a day that will live in infamy.”

The third is also real and is one component of what is, to me, a bizarre antisemitism among many people around the world. We live in a strange world in which racial discrimination is perhaps the major taboo after pedophilia, and antisemitism is – not exactly ok, but accepted in many parts of the population. Ok to hate Jews; not ok to hate blacks.

I gave up on trying to make it all make sense a long time ago. The best I can do is to describe what is going on.

**So you take a mostly-empty part of the world that no one cares about except its inhabitants, which is a significant exception, and turn it over to the Jews. This is post-World War II, and much of the world is having its boundaries redrawn and millions of people are on the move. Whole countries are being formed and iron curtains are being put up. A number of flash point would be created.**

**But, speaking of hating Jews, Israel happens to be in the middle of a large area populated by Muslim countries.**

**It turns out that Jews, together with Christians, are “People of the Book,” according to Islam. Jesus and Moses are among Islam's Prophets. Most humans are in a subcategory, but People of the Book have a special status – not quite damned and not quite saved. People of the Book are basically to pay a special tax and be left alone, while the third group – I’m not sure how to describe it diplomatically, but how about, discrimination is ok.**

**That’s not how it turns out. Jews are not ok and are perceived as the enemy.**

**A lot of this is opportunistic political rhetoric to unite a country behind a common enemy. Prior to the Gaza War, that dynamic, while still strong, was waning. The timing of the October 7 attack by Hamas on Israel may have been influenced by the probability of an accord between Israel and Saudi Arabia.**

**It is not a stretch to assert in overstatement that no one in the Middle East cares about the Palestinians. No country is offering refugees asylum and none, except for Iran, is providing meaningful support. In any event, there have been several wars by Israel’s neighbors to try to wipe it out, none of which succeeded.**

**Which gets us to the recent status quo. Israel is under continual threat from Muslim countries. It is continually being physically attacked from Gaza and from Lebanon. Several nations, particularly Iran, have vowed to wipe Israel from the map.**

**Which brings us to Gaza and October 7.**

**Let’s have a thought experiment.**

**Let's say that every month or so, drug lords in Mexico would place a bomb in the US and kill several Americans. Or would cross the border and shoot somebody and rape others. This goes on for years. Hundreds, thousands of Americans attacked.**

**And we react, striking targets in Mexico. Hundreds, thousands of Mexicans attacked.**

**Over the years, atrocities pile up on both sides – these children killed here; this nurse raped there. It is clear that Mexico is provoking the US and is the primary agitator, but, after all, the US stole Texas and other land from Mexico – it was theirs (Native Americans are not considered by either side). All of a sudden, these Protestant Europeans showed up on Mexico's Catholic land, back when that mattered a great deal. And Americans did enough outrageous things to cause Mexicans to be genuinely angry.**

**One day, a group of Mexicans crosses the border. They kill more than 1,200 Americans, raping essentially every woman they can find. And then they take 251 Americans hostage back to Mexico. The lowest, most depraved of human behavior.**

**What would be demanded of the government? How would we react, even if Trump were not President?**

**Yep, at that point, I'm on team Israel. Wipe the bastards out. Atrocity does not begin to adequately describe the October 7 attack. Just an abomination.**

**By "the bastards," I mean Hamas.**

**Bad guys, no question.**

**Even if you sympathize with them, they have taken things way too far. But Israel makes a fateful decision. Instead of killing some part of Hamas in retaliation – the time-honored way - they decide to take out the entire organization. Israel has taken all it can take. The straw broke the camel's back and Israel is not going to have its citizens killed, raped and taken hostage any more. This cannot be a token reprisal. This has to be annihilation of Hamas.**

**Only, Hamas is enmeshed into Gaza. It has purposefully set up operations in schools and hospitals. A major attack on Hamas would necessarily be a major attack on all Palestinians.**

**Israel turned to scorched Earth.**

**Maybe the idea was to get the populace to rise up against Hamas, but that did not work.**

**Gaza has been leveled.**

**Some 70,000 Palestinians have died.**

**Another abomination.**

**We now spend time measuring relative abominations.**

**There is no way to do that.**

**Whichever side you come down on, you're wrong. As Beth would put it, you are picking your favorite Menendez brother.**

**You cannot – must not - morally support abominations.**

**But, non-Hamas Palestinians are caught in the middle of dueling abominations.**

**So, what is the solution?**

**Of course, there is not one.**

**The US became culpable by not reining in Israel early in the process. It is now too late.**

**Israel is on a roll and has now turned to Hezbollah and is slowly destroying Lebanon.**

**And Iran.**

**More abomination.**

**And the US is doing the same to Iran.**

**The Iranian government and army are bad guys, but now, so is the US. Metastasizing, multiple abominations, including by us.**

**And the ultimate reality is that there is no way to make it stop or make it better. If everyone quit destroying everyone else today, the old prejudices and anger would resurface, this time on steroids, and with justification on both sides.**

**Maybe someone will win and, over subsequent generations, anger and outrage will diminish. The atrocities may fade into the mist, much like Japanese atrocities in World War II, or even the Holocaust.**

**That's the best we can hope for.  
A plague on both their houses - and on ours.  
Human nature is a bitch.**

## **Claude Code and Me**

**I wrote my first line of computer code in 1966 - in machine language, input on paper tape into a computer with 8k words of 24-bit memory and a magnetic tape drive.**

**In other words, I walked to school 5 miles in snow, up hill, both ways. Along the way I have learned to program in several languages, help design the first long distance, multiplexed communication systems used by computers and remote terminals, have designed operating systems to handle multiple, concurrent users. I am not a top-level techie by any means, but I know my way around.**

**Or, I used to know my way around. Other than teaching myself html and xml, I haven't really kept up for decades.**

**Then, AI happened and drew me back in.**

**And, it was fantastic, and fun and very productive.**

**But then, about 4 or 5 months ago, I had a religious experience.**

**I had been using AI for some time and had been using Claude to help me put together complex AI automations. It was really something. In, say, a minute, Claude would construct an automation that would have taken me maybe 10-12 hours.**

**Of course Claude and I had to debug its creation for maybe 3-4 hours, but I would have had to have debugged my own system. Net, I was way ahead.**

**But, I still had to deal with putting together interfaces with humans and with databases. There was a lot to do for architecture and design before I asked Claude for help.**

**Then, I heard about Claude Code.**

**Basically, you tell Claude Code what you want in plain English and it can design, architect, build and launch a complete system - front end, back end.**

**Holy shit.**

**Literally a world-changing miracle.**

**There are still bugs, but I have written routines to instruct Claude Code to debug its own code. There are some bugs left to shoot, but this is incredible.**

**Now I'm talking days or weeks or even months of time saving.**

**I'm in the process of writing a fairly large, complex system in Claude Code. I wouldn't even attempt it on my own, and I am just about to begin testing a prototype. I just asked Claude Code to review the system from security and data privacy perspectives and make recommendations. It made a list, we discussed it, and I told Claude Code to fix the top three problems.**

### **What to do first**

If I had to pick three items to fix before any production use:

1. **Replace `/dashboard/query` with specific endpoints + a read-only DB role.** Removes the broadest blast radius.
2. **Replace header-asserted `X-User-Id` with a real auth path.** Without this, every GAP-01 approval gate is bypassable by a caller with a valid token.
3. **Sign the Anthropic DPA and document what data is sent.** Regardless of fixes 1 and 2, candidate data is leaving the system today.

Happy to detail any of these further, or write a mitigation plan for a specific item — no code will change until you ask.

Please keep track of these. Please implement 1 and 2 and provide details of how to do 3.

**Here's the kicker.**

**It learns.**

**It keeps track of what we are doing and creates rules so that the next time we do something, we will not make the same mistakes again.**

**My actual setup consists of three screens - Claude Code on one; either the running system or Claude on the next; and the terminal on the third.**

**I run the system until I find an error, debug in Claude, it constructs messages for me to give to Claude Code, Claude Code checks Claude's work and then fixes the bug and updates the system and associated documentation and then I run a new test.**

**By myself I will have completed perhaps 60 person-months of effort in one month.**

**And this is early days for AI. I have likened it to the Wright Brothers at Kitty Hawk. The moon landing is coming.**

**There are simply no words to describe the potential, always for good and ill, of the AI revolution. It is simply astounding.**

**Of course humans will rebel and there is not enough electricity, so we may never realize its full potential.**

**And, we are being heavily subsidized so that use of AI will become much more expensive.**

**But, for right now, today ...  
holy shit.**

## **So, You Say You Want A Revolution?**

**(I will explicitly note any use of AI throughout this newsletter. If there is no AI-note, you can assume it is either my writing or a quote from a news source.)**

**> We are awash in corruption. Los Angeles has found 500 nonexistent (don't read that phrase literally) hospices which have been reimbursed hundreds of millions of dollars.**

**A billion dollars was bet in prediction markets just prior to the Strait's opening up.**

**> Pew Research study reveals nearly 10% of all babies born in the U.S. in 2023 were "anchor babies" born to non-citizen parents.**

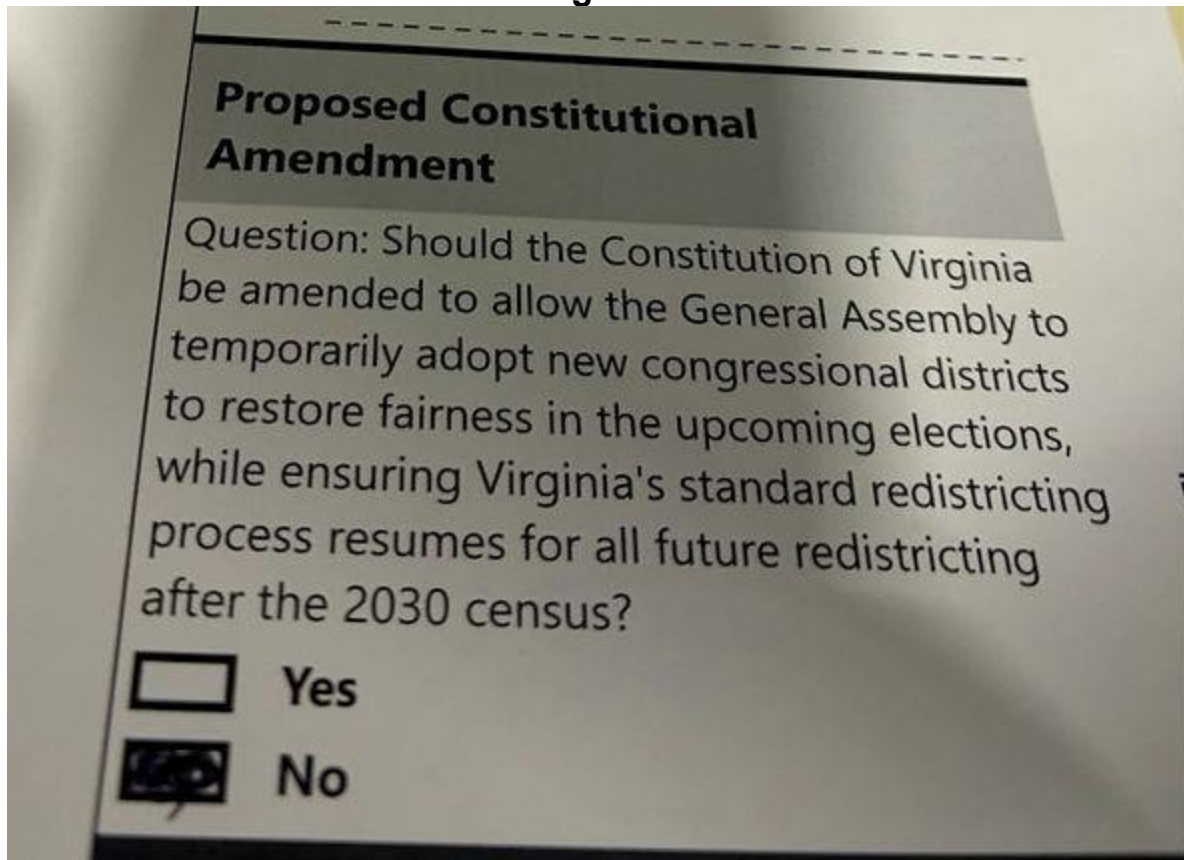
**> JD Vance: "People don't have any idea how bad the corruption is in Washington DC."**

**JD., one day your group will control the Presidency and both Houses of Congress and conservatives will be a majority on the Supreme Court. Then you will be able to take care of the problem.**

**> I have been discussing the fairness of US elections off and on. In general, while there are many attempts at rigging, our elections turn out to be pretty fair.**

**At the same time, I have noted that gerrymandering is the foundation for cheating in the American system.**

Here is a referendum ballot in Virginia that is shameless.



## **The Iran War**

> The stalemate continues - Trump extends ceasefire by - it varies depending on the day; I think today the number is - three weeks while continuing blockade. In my daily update, Claude calls it "the ceasefire that is not."

> Israel and Lebanon also extended their ceasefire by three weeks.

> Trump extended the Jones Act waiver for 90 days.

> The world continues to grind down. Air pockets empty of resources are getting wider. Madness. Simply madness.

Claude gives me a status update each morning. Following is an excerpt from Tuesday's update -

**(Talking about oil) The reason the cliff hasn't produced a spike to \$130+ as some analysts feared: SPR releases, demand destruction, and alternative supply routes have created a messy but functional substitute for Hormuz flows. The IEA reported global oil supply plummeted by 10.1 mb/d in March, with OPEC+ production falling 9.4 mb/d — the largest disruption in history — but also that global oil demand is now projected to decline by 80 kb/d on average in 2026 as elevated prices curb consumption [IEA](#). The supply shock is real, but so is the demand response. The system is bending, not breaking.**

**> According to a brand new survey that was just conducted by the American Farm Bureau Federation, 70 percent of U.S. farmers say that they will not be able to purchase all of the fertilizer that they need in 2026 because it has become so expensive.**

**> Duh - THE UNITED STATES BELIEVES THERE IS A SPLIT BETWEEN THE IRANIAN NEGOTIATION TEAM AND THE REVOLUTIONARY GUARD. One of our problems is that there is no one person in charge.**

**> JP Morgan analyzed when Iran would begin feeling the effects of the blockade -**

**Iran's onshore storage capacity is roughly 86 million barrels and is currently about 54% full (around 47 mb), leaving approximately 40 mb of working capacity—equivalent to about 22 days of exports. In addition, roughly four Iran-linked VLCCs remain inside the Strait of Hormuz. If loaded, they could carry about 8 million barrels, extending the window to roughly 26 days.**

**In reality, upstream production adjustments would start sooner and build over time rather than occur all at once. A practical rule of thumb is that Iran would need to begin reducing production after roughly 16 days of a total export blackout, with curtailments then ramping up toward full export-volume shut-ins, or around 1.9 mbd, closer to day 30.**

**Translation: with a "total export blackout" having effectively started this weekend, Iran now has about 15 days before it has to begin production shut-ins, which then have to be fully completed by day 30, or sometime around May 20.**

**> I asked Claude to briefly summarize the resource effects of the war so far.**

**"The real economic damage being felt today is concentrated in (1) the fertilizer-to-food chain, where US and global spring planting decisions are already locked in at reduced input levels, (2) the LNG market, where Ras Laffan damage is not reversible on any useful timeline, and (3) rates/inflation, where central banks have lost their easing path. Oil price spikes get the headlines, but the fertilizer and LNG damage has multi-year tails baked in regardless of what happens with the ceasefire."**

**> Lufthansa cuts 20,000 flights to save fuel as prices soar.**

### **Short Takes**

**> The best part of bullying Brits online is if they reply back they get arrested.**

**>The latest report from David Reich's genetics lab at Harvard is that "Ancient DNA reveals pervasive directional selection across West Eurasia." In other words, humans have been continuing to evolve in Europe and the Middle East for the last 10,000 years, with significant effect. Reich's paper broadly substantiates the thesis of Gregory Cochran and Henry Harpending's The 10,000 Year Explosion: How Civilization Accelerated Human Evolution. Civilization hasn't ended biological evolution, but proceeds alongside it.**

**Reich's genome-wide association study (GWAS) indicates that West Eurasians have increased or reduced their vulnerability to a variety of ailments. Genetic changes have rendered them less susceptible to leprosy, rheumatoid arthritis, bipolar disorder, and schizophrenia, and moreso to coeliac disease and gout. At the same time, there has been**

positive selection for fair skin, red hair, and intelligence, and negative selection for male-pattern baldness.

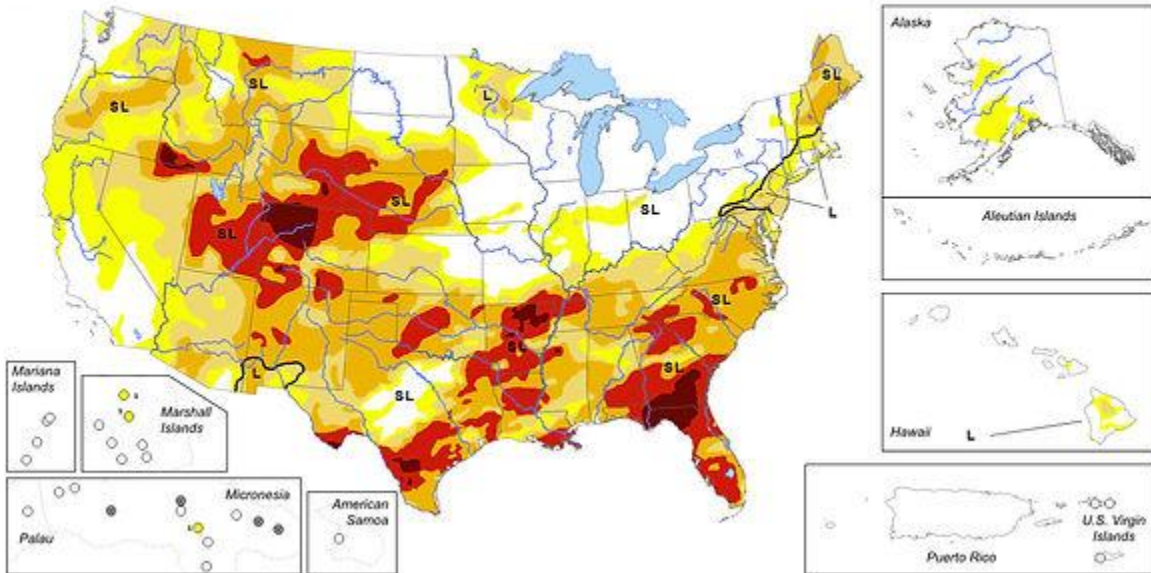
## Gallery

Approximately 60% of the lower 48 is in draught.

Map released: April 16, 2026

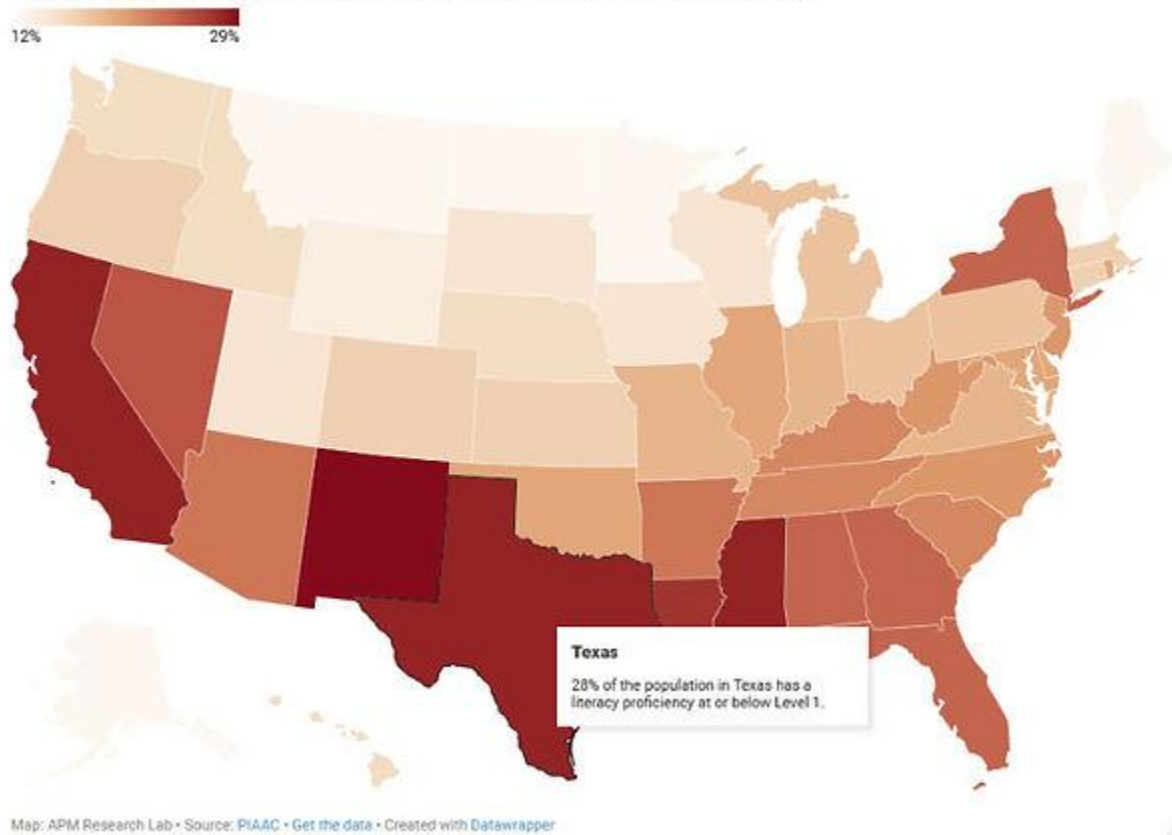
Data valid: April 14, 2026

View grayscale version of the map



About 54% of U.S. adults (ages 16-74) — roughly 130 million people — read below a 6th-grade level.

## Percentage of State Populations at or Below Level 1 Literacy



## Miscellaneous

 **The Babylon Bee**  @TheBabylonBee · 18h

Mamdani Orders Visiting Teams To Redistribute Some Of Their Runs To The Mets [buff.ly/OSxh4TC](https://buff.ly/OSxh4TC)



STRAIT OF HORMUZ BLOCKED

