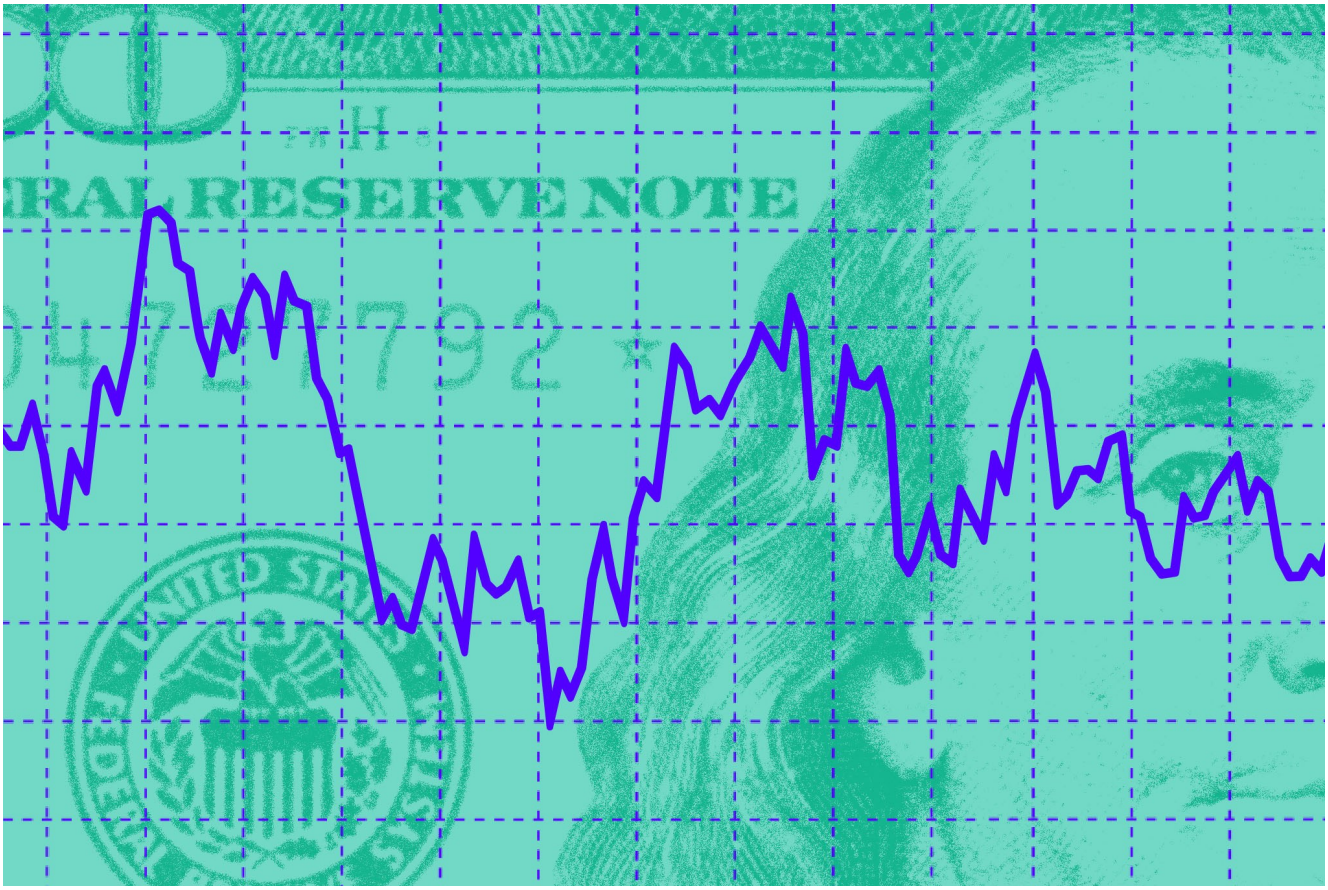
Fall 2026 earnings watch



Every company is suddenly an AI company. Compute is an asset. Cars are flying. We've been promised robots — again. It's time again to dig through earnings reports, listen to investor calls, and call out the latest wins and losses from around the tech sector and what it means for where the companies go next.

- Sure, let's smoosh SpaceX and Tesla together, who cares
- Just because Tesla's Optimus is in production doesn't mean it's actually ready
- In Meta's version of the future, I'll have my Muse call your Muse

- Tesla says customers can add their own vehicles to the robotaxi fleet next year — will it happen?
- Meta to create a new class of shares to fund AI push
- Meta says it would've made over $22 billion if it didn't have to pay a child safety settlement

- Not even flying Roadsters can lift Tesla’s flat Q3 revenues
- Tesla and SpaceX are discussing a possible merger, Musk says
- SpaceX will try catching Starship and its booster for first time, Musk says
- Netflix is telling investors not to worry, even though you’re watching less and less
- SpaceX says big AI growth fueled revenue jump

https://www.theverge.com/tech/1016506/fall-2026-earnings-watch