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Despite the short-term uncertainty over capital rotation, the overall market sentiment remains positive. "It is a very good time for the markets, and is likely going to remain that way for the short-term foreseeable future," Le Shi, managing director at algorithmic trading and market-making firm Auros, told Decrypt in an interview during Token2049 in Singapore last week.

Polymarket recently reclaimed market leadership from Kalshi after trailing for eight weeks, posting \$1 billion in weekly volume against Kalshi's \$950 million.

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While the \$20 million plan was designed as a short-term measure, the latest proposal seeks to make buybacks perpetual, embedding them directly into the DAO's governance and treasury management. The move would shift Aave from opportunistic market reactions toward a systematic, rule-based capital strategy, echoing corporate-style financial management.

Around two-thirds of institutional investors have a positive outlook for Bitcoin going into 2026, according to Coinbase.

Among the measures Grewal wants Treasury to consider is a regulatory exception under the Bank Secrecy Act for companies using AI and Application Programming Interfaces (API) driven monitoring tools.

However, investors and companies are seeking to get ahead of the problem by urging the adoption of post-quantum cryptography standards before a sufficiently powerful quantum computer emerges.

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