

México Podcast Chatter – May 13th, 2026

Our top podcast recommendation this week is *Narcosistema*. Drawing on alleged testimonies, leaked audio recordings and court documents linked to the indictment filed by the US District Court for the Southern District of New York, Hernández argues that the main source of bilateral tension stems not only from the charges against Rocha Moya, but from what US officials perceive as a deliberate refusal by the Mexican government to investigate politically protected figures using the same criteria employed to extradite and prosecute drug trafficking leaders.

On the business and economic front, *Rodcast* interviews Sergio Rosengaus, founder of KIO Networks and Bleeding Edge, who argues that artificial intelligence already functions as strategic infrastructure and that Mexico needs to accelerate investment in energy, data centres and computing capacity. *MexMoves* analyses an economy where investment continues to flow into infrastructure and industrial parks, whilst the growth of pawnshops, informal credit and discount stores reflects pressure on household finances. *Whitepaper 10* examines quiet shifts within traditional industries, from the rise of non-alcoholic beer to new ventures in the InsurTech sector. *Fintech Briefing* argues that artificial intelligence, digital payments and cybersecurity are now part of the same discussion, whilst fintechs such as Nu, Klar and Stori face pressure to move beyond rapid growth and focus on profitability and operational resilience. In *Strategy of the Day*, the picture is rounded off with an economy where optimism surrounding nearshoring and the 2026 World Cup coexists with signs of a slowdown and lower consumption.

On domestic politics, *Tercer Grado*, *Política y otros datos* and *Broojula* agree that the case against Rubén Rocha Moya has already transformed the relationship between Mexico and the United States into something broader than a diplomatic conflict. The reports argue that Washington is beginning to link drug trafficking, trade, investment and security under a single strategic framework, whilst the allegations against officials from Sinaloa raise questions about the extent to which organised crime has penetrated local governments and political institutions. *El Noti*'s weekly round-up complements this picture with a government under simultaneous pressure from insecurity, institutional erosion and growing tensions with the United States.

In *Mexico Matters* Mariana Campero interviews counter-terrorism expert Dan Byman on how the conflict between the US and Iran could end up indirectly affecting Mexico in the run-up to the 2026 World Cup. At the same time, the podcast highlights how cooperation between Mexico and the US on drug trafficking, intelligence and security continues to deepen under Claudia Sheinbaum.

Finally, in history and culture, *Sal con amigos* talks to Rafael Cabrera about how the 1971 Avándaro raid came to symbolise the criminalisation of counterculture and youth during the PRI regime, whilst *El*

Colmex reconstructs the history of pollution in the Tula basin to show how decades of unplanned urbanisation and industrial growth ended up turning a water solution into one of the country's most serious environmental crises.

Mexico Business, Economics & Finance

The scammer who deceived Mexico's comedians — *Dimes y Billetes*

Comedian and digital creator Vero Monti appears on *Dimes y Billetes* this week to reflect on financial informality and the economic fragility underlying many personal and creative relationships in Mexico. Monti recounts how her ex-husband ran a Ponzi scheme within the comedy circuit for years, exploiting relationships of trust and promising high returns to obtain money from comedians, friends and acquaintances. Beyond the fraud, the conversation explores themes such as economic violence, financial dependency and the absence of clear conversations about money within couples, highlighting how opacity and the lack of contracts facilitate abuse even within close circles. In parallel, Monti recounts how Damitas Histeria went from being an improvised project on TikTok and Instagram to a company with international tours and a professional team, arguing that growth in the creator economy depends less on virality than on operational discipline, business structure and a constant relationship with audiences.

05/06/26, Moris Dieck with Vero Monti, [Dimes y Billetes](#)

Sergio Rosengaus, Founder and President of Bleeding Edge — Rodcast

Sergio Rosengaus argues this week that artificial intelligence has evolved from a technological tool into a new layer of economic infrastructure, comparable to the emergence of the internet or cloud computing, and warns that Mexico risks falling behind if it does not step up investment in energy, computing capacity and specialised data centres. In conversation with Rodrigo Pacheco, the founder of KIO Networks and Bleeding Edge argues that AI will transform far more than individual productivity, reshaping the way companies organise operations, process information and compete globally through autonomous agents, distributed inference and mass consumption of 'intelligence tokens'. The episode also suggests that the real challenge will not be merely adopting AI tools, but building sufficient technological and energy infrastructure to sustain this growing dependence, in an environment where computational sovereignty, the geopolitics of chips and access to competitive energy are beginning to emerge as strategic factors for long-term competitiveness.

11/05/26, Rodrigo Pacheco with Sergio Rosengaus, [Rodcast](#)

The new push for deregulation, the silent boom in pawnshops and the mixed signals from the Mexican economy — MexMoves

This week, *MexMoves* explores the contradictions of a Mexican economy that is attempting to project modernisation and investment whilst signs of structural fragility persist in consumption, financing and

institutional confidence. Building on the new announcements of deregulation and investment facilitation by Claudia Sheinbaum's government, the episode acknowledges progress in reducing red tape, regulatory flexibility and new mechanisms for infrastructure, though it warns that these efforts remain limited by deeper concerns over legal certainty, judicial reform, energy availability and trade tensions with the United States. At the same time, the podcast uses the rapid growth of pawnshops, discount stores and informal credit as an indicator of pressure on household finances and the persistent difficulties in accessing finance within large sectors of the informal economy. The episode also highlights how, despite the slowdown in economic momentum, there remains a strong appetite for investment in infrastructure, energy and industrial property, reflecting an economy divided between the long-term optimism of certain sectors and the day-to-day decline in consumption among millions of Mexican households.

08/05/26, Eduardo García with Damian Fraser, [MexMoves](#)

Mexico's next business shifts: insurtech, non-alcoholic beer, and industrial growth – Whitepaper 10

This week, René Lankenau and Susana Sáenz analyse several quiet transformations taking place within traditional industries that are facing new consumer habits, technological pressure and business models that are becoming increasingly difficult to sustain. The episode begins with Sofía's new investment round and the as-yet-unrealised potential of the InsurTech sector in Mexico, particularly in a highly concentrated insurance market that is becoming increasingly expensive for families. They then discuss the growth of non-alcoholic beer, driven by younger consumers and brands such as Corona Cero, as part of a broader shift in the dynamics of alcohol consumption. The podcast also uses the cases of Nike and BlackBerry to illustrate how dominant companies can rapidly lose relevance or completely reinvent themselves in the face of technological and cultural changes: whilst Nike faces growing market doubts after losing ground to new sports brands, BlackBerry has managed to reposition itself as a provider of critical software for vehicles and security systems. In parallel, the episode reviews leadership changes at Mexican companies such as La Mosa and FINSA, highlighting how sectors linked to infrastructure, logistics and industrial parks continue to be long-term structural pillars of the Mexican economy.

06/05/26, René Lankenau with Susana Sáenz, [Whitepaper 10](#)

Agentic commerce, fintech pressure, and the digital stress test of the 2026 World Cup – Fintech Briefing

Fintech Briefing argues this week that the Mexican financial system is undergoing a transition in which artificial intelligence, digital infrastructure and cybersecurity are now inextricably linked. Drawing on examples such as American Express's new autonomous payment system and automated debt collection start-ups like Cleva, the episode explores how AI-driven financial agents are transforming the dynamics of trust, fraud prevention and debt recovery within the banking ecosystem. At the same time, it argues that the end of the high-interest rate cycle is forcing fintechs such as Nu, Klar and Stori to abandon growth models based on aggressive returns and focus on profitability, collections and expansion into

business services. The podcast also cites the accelerated digitisation of payments, partnerships between neobanks and chains such as Oxxo, and the temporary removal of fees at petrol stations as evidence of a wider battle to control the country's financial infrastructure. In the background, the 2026 World Cup emerges as a stress test for Mexico's increasingly cashless economy, whilst the episode warns that cyberattacks and infrastructure failures already pose economic, regulatory and national security risks, not merely technological problems.

05/05/26, Fintech Briefing, [FintechExpert](#)

Weekly Summary – La Estrategia del Día

This week, Banxico's decision to cut interest rates whilst inflation remains above target reflects the difficult balance between supporting an economy that is slowing down further and maintaining monetary credibility in an environment marked by global volatility, geopolitical tensions and reduced domestic momentum. The episode paints a picture of a Mexico where narratives of optimism surrounding nearshoring, industrial infrastructure and the 2026 World Cup coexist with increasingly visible signs of structural fragility. Whilst Carlos Slim continues to expand his presence in strategic sectors such as energy, industrial fibres remain attractive to investors and companies such as Airbnb anticipate extraordinary profits from the tournament, concerns persist regarding weakening consumption, financial pressure on Pemex, the deterioration of education and the ability of traditional companies such as Televisa to adapt to a rapidly changing media and technological environment. Beyond the grand announcements of investment and regional growth, the episode suggests that many of Mexico's structural challenges remain unresolved, particularly in terms of productivity, institutions and long-term economic confidence.

07-11/05/26, Jimena Tolama, [La Estrategia del Día](#)

Mexican Political Affairs

A Global Game of Chicken – Mexico Matters

This week, *Mexico Matters* explores how Mexico is becoming increasingly vulnerable to geopolitical conflicts and global security threats that once seemed far removed from the country's immediate reality. In conversation with counter-terrorism expert Dan Byman, Mariana Campero argues that the war between the United States and Iran and the intermittent closure of the Strait of Hormuz are redefining the logic of deterrence and raising the risks of asymmetric attacks, digital sabotage and decentralised violence in the context of the 2026 World Cup. The episode warns that the tournament will test an unprecedented level of coordination between Mexico, the United States and Canada, particularly in the face of threats that are difficult to anticipate and contain, ranging from actors linked to Iran to radicalised individuals or cyberattacks against critical infrastructure. At the same time, the discussion highlights how security cooperation between Mexico and the United States under Claudia Sheinbaum continues to deepen through extraditions, anti-drug trafficking operations and greater bilateral coordination, even as

the Mexican government seeks to preserve political leeway and autonomy in the face of growing pressure from Washington.

08/05/26, Mariana Campero with Dan Byman, [Mexico Matters](#)

The audios implicating Rocha Moya: Does the U.S. fear his escape or death? — Narcosistema

Anabel Hernández argues this week that the case against Rubén Rocha Moya is no longer solely about corruption or the protection of drug trafficking, but about the very credibility of the Mexican state in the eyes of the United States. Drawing on alleged testimonies, leaked audio recordings and court documents linked to the indictment filed by the US District Court for the Southern District of New York, the episode argues that Washington is beginning to view sections of Morena and local governments in Sinaloa as structures increasingly intertwined with the Sinaloa cartel. Hernández also argues that the main source of bilateral tension stems not only from the charges against Rocha Moya, but from what US officials perceive as a deliberate refusal by the Mexican government to investigate politically protected figures using the same criteria employed to extradite and prosecute drug trafficking leaders. Beyond this specific case, the podcast portrays growing political and judicial pressure from the United States on Mexico, in a context where new allegations against Mexican politicians could deepen the conflict between national sovereignty, bilateral cooperation and narco-politics.

08/05/26, Anabel Hernández, [Narcosistema](#)

Sinaloa, sovereignty, and mounting U.S. pressure — Tercer Grado

This week, *Tercer Grado* examines how the case against Rubén Rocha Moya is beginning to reshape the relationship between Mexico and the United States, shifting the focus from bilateral cooperation towards national security and institutional pressure. The episode argues that the accusations from the Department of Justice and Donald Trump's recent statements should no longer be viewed merely as isolated episodes of diplomatic tension, but as part of a broader US doctrine that merges drug trafficking, terrorism and hemispheric security under a single strategy. Drawing on new security documents published by the White House, the panel warns that Washington is beginning to treat Mexican sovereignty not as an absolute limit, but as a variable subordinate to its security priorities. At the same time, the discussion explores how the Rocha Moya case reopens the debate on the capture of local institutions by organised crime, the erosion of electoral democracy and the internal contradictions within Morena, a movement that promised to 'purify' public life but now faces growing questions about links between politics and drug trafficking.

05/07/26, René Delgado with Denise Maerker, Leo Zuckerman, Leopoldo Gómez, Enrique Acevedo, and Viridiana Ríos, [Tercer Grado](#)

Trump, narcoterrorism, and the new pressure on Mexico — Política y otros datos

This week's edition of *Política y otros datos* argues that US pressure on Mexico is no longer limited to the fight against drug trafficking, but is beginning to redefine the bilateral relationship in terms of

national security, institutional stability and economic viability. Drawing on the allegations against Rubén Rocha Moya and Donald Trump's new counter-terrorism strategy, the episode argues that Washington seeks to use judicial, financial and diplomatic tools to weaken criminal governance networks which, according to the panel, have penetrated local governments, electoral processes and economic structures in various regions of the country. The discussion also warns that the fentanyl crisis has allowed security, trade and politics to be merged under a single US strategic logic, increasing pressure on Mexico on the eve of the USMCA review and amplifying the risks to investment, institutional trust and bilateral cooperation. Beyond the immediate diplomatic tensions, the podcast frames this moment as a test of whether the Mexican state can rebuild institutional capacities and contain the criminal takeover of territories before external pressure ends up further reshaping the country's sovereignty and internal political balance.

07/05/26, Mariel Ibarra with Miguel Sigala and Marisol Ochoa, [Política y otros datos](#)

Mexico between Trump, Sinaloa, and economic stagnation — Broojula

Growing pressure from the United States, institutional decline in Sinaloa and the economic slowdown are the focus of Brújula this week. Ana Paula Ordorica argues that Donald Trump's threats and the ruling party's insistence on defending 'sovereignty' reflect a bilateral relationship increasingly dominated by security, drug trafficking and political pressure, whilst Washington issues warnings about possible new charges against Mexican officials. Meanwhile, Sinaloa MP Paola Gárate describes a state where organised crime, political power and the judicial system operate in an increasingly intertwined manner, denouncing family networks within local institutions, persecution of opponents and an environment where speaking out publicly entails real personal risks. The episode also suggests that the Rocha Moya case could be just the beginning of a more aggressive phase of US pressure on Mexico, in a context where institutional fragility is beginning to affect not only security, but also the international perception of governance, investment and economic stability. Underlying this, the discussion regarding Banxico, the slowdown in economic momentum and trade uncertainty with the United States reinforces the idea of a country simultaneously confronted by external tensions and internal structural weaknesses.

07-11/05/26, Ana Paula Ordorica with Arturo Sarukhán, Paola Gárate, and Gabriela Siller, [Broojula](#)

Weekly Summary — El Noti

This week, El Noti profiles a Mexican government caught between mounting external pressures and increasingly visible signs of internal institutional fragility. Donald Trump's renewed threats of intervention, the case against Rubén Rocha Moya and the review of Mexican consulates in the United States reflect how security, drug trafficking and judicial cooperation are shifting the focus of the bilateral relationship towards a far more confrontational dynamic. At the same time, the confusion surrounding a possible change to the school calendar exposed coordination and communication problems within the federal government itself, whilst violence in Guerrero, attacks linked to the Sinaloa cartel and episodes

of insecurity in various regions reinforced the perception of a state under growing pressure to contain simultaneous crises of governance, security and public credibility.

07-11/05/26, Maca Carriedo and Javier Garza, [El Noti](#)

Mexican Culture & Society

Sal with Rafael Cabrera — Sal con amigos

Rafael Cabrera joins Sal to discuss his new book *Redada en una fiesta hippie*, his reconstruction of a 1971 police raid that became a symbol of how Mexico criminalized youth culture, sexuality, and dissent after 1968. Through archives, testimonies, and cultural history, Cabrera argues that what authorities feared was not simply drugs or a party, but forms of personal freedom that challenged the conservative political order of the time. The conversation connects the repression of Mexico's counterculture with broader questions about police abuse, moral panic, censorship, and the slow construction of civil liberties in Mexico City. More than nostalgia, Cabrera reminds us that many freedoms now considered ordinary were once treated as threats by the state.

06/05/26, Salvador Camarena with Rafael Cabrera, [Sal con amigos](#)

History of contamination in the Tula basin: a past that explains the present — El Colmex

This episode traces how decades of urban expansion, industrialisation and ill-considered public policy decisions transformed the Tula basin into one of the most striking examples of environmental degradation and water crisis in Mexico. Judith Domínguez and Manuel Ordorica explain how the wastewater sent from Mexico City, which for years was promoted as a viable solution for agriculture in the Mezquital Valley, ended up mixing with industrial effluent, heavy metals and chemical pollution that today affect crops, aquifers and public health. The conversation portrays a daily reality marked by respiratory diseases, kidney failure, cancer and persistent environmental degradation in communities that have historically borne the costs of the capital's development. Beyond the specific case of Tula, the episode frames Mexico's water crisis as a structural problem of governance, urban planning and territorial inequality, warning that without institutional coordination, community participation and long-term policies, the social and environmental costs will continue to deepen.

06/05/26, Judith Domínguez with Manuel Ordorica, [El Colmex](#)