

INVESTING IN AI

AI, Its is everywhere, and yet it has not yet begun to change our lives

In 1990 you probably didn't yet have a computer in your home, and might have barely heard of this thing called the internet.

At some point in your life you have had a desk top (at home and at work) a laptop, an iPad, a MP3 or iPod, and a cell phone 9 maybe a smart watch, and who knows what else.

And you have SOOO many passwords you need a password keeper App.

Difference between an algorithm and AI is that the former is created by a human with assistance of a computer, and does (presumably) what it is designed to do. AI is supposed to grow and evolve into a better version of itself (presumably) just by doing its function.

AI IS the future, same as computers and the internet were the future 35 years ago, but early providers may not have survived

AOL: dial up, Yahoo, WebCrawler, LYCOS, Infoseek, Ask Jeeves.

YAHOO on 01/03/2000 stock price was 485.00, (market cap 17 billion,) on 09/26/2001 it was 33.00 (MC 1 Billion). At both prices corporate revenue was about \$200 Million

2008 MSFT offers \$45 Billion to buy Yahoo, when revenue was about \$7 billion

2016 Verizon buys it for \$5 Billion , when revenue was 5 Billion

Negative. What happens when AI conflicts with profits

Example: I suffer from sinus issues. What if my VONS APP suggested that the day I am buying more anti-histamine maybe I shouldn't be buying wheat based crackers. Nabisco may not like that. What if the APP went further and suggested a saline nasal wash device for daily use. The maker of my Anti-histamine would hate that.

AI world and investment opportunities are divided into segments

1. Applications
2. Models
3. Hardware
4. Software
5. Infrastructure
 - a. Cloud Computing
 - b. Hardware
6. Chip Fabrication
7. Data Storage
8. Data Centers

CORE NEEDS

Copper

Silicon

Electrical Power

Actual Data

Ability to transmit

ETFs

AIQ (more about the user end)

CHAT (about providers to end users)

ARTY

AIBU

XAIX

IGPT (next gen software)

BOTZ (robotics)

Stock ideas with in the category segments

HARDWARE, INTC (buy out), NVDA

SOFTWARE: IBM, NVDA, PLTR, MSFT

INFRASTRUCTURE

Cloud Computing: AAPL, AMZN, MSFT

Hardware: NVDA, DELL, ANET

CHIP FAB: TSM, AMD, INTC

DATA STORAGE SAP, INTC, NVDA, NTAP, AMZN (AWS) PURE, HPE, MU DELL

DATA CENTERSGOOGL, META, AMZN, SYNA, GLW

ANET (DATA CENTER DESIGN)

PATH (ROBOTICS FOR DATA CENTERS)

Individual stocks

MSFT

CSCO

ASML

TSM chip manufacturing

DELL (XAI buying their chips)

BABA CHINA

MU (Chip manufacturing) recovery from low valuation

PLTR

SMCI . management? Data storage

AMD

APLD: Infrastructure (NVDA a major investor)

NBIS: Infrastructure (NVDA a major investor)