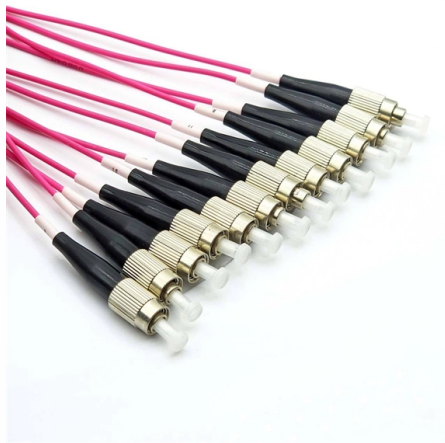


AI Optical Module Investment Recommendations



Overview

Lumentum is scaling optical circuit switching and advanced laser capacity for AI data centers. Coherent is pushing a full roadmap across pluggables, co-packaged optics, and silicon photonics. (Yicai) April 28 -- Public funds in China continued to invest intensively in shares of companies from the optic communication industry last quarter amid the explosive growth of artificial intelligence models. Public funds' holdings in the communication sector topped 13.1 percent as of March 31. AI infrastructure is forcing the network layer to solve for bandwidth density, latency, power efficiency, and physical scale all at once, pushing the optical stack toward the center of the next data-center buildout. 2T. AI Optical Module by Application (InfiniBand Connection, Ethernet Connection), by Types (200G Optical Module, 400G Optical Module, 800G Optical Module, 1.6T Optical Module), by North America (United States, Canada, Mexico), by South America (Brazil, Argentina, Rest of South America), by Europe. Datacom AI boost began in late 2023 •Datacom AI boost has already started –The AI architectures require optical components for XPU scale up and scale out architectures •Optical Network just emerging from slowdown –Intuitively, AI will start to impact the optical core in a meaningful way –Just. Optical modules, which allow ultra-fast communications in data centres, have minted a new class of industrial upstarts. In the past year, shares in Shenzhen-listed Zhongji Innolight, the world's largest optical module producer, jumped tenfold. Smaller peers Eoptolink Technology and Suzhou TFC. Optical component makers are investors' latest darlings. Companies like Applied Optoelectronics Inc.

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Nvidia's \$4 Billion Investment In Optics Companies

Nvidia invested \$4 billion in Lumentum, Coherent, and Ayar Labs to secure optical interconnect supply. The deals build competitive moats as AI

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NVIDIA Announces Strategic Partnership With

NVIDIA today announced multiyear strategic agreements with Lumentum Holdings Inc. (NASDAQ: LITE) to accelerate innovation in advanced

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Optical Components Market Update

- AEC/direct attach copper cables (DACs), AOCs, and optical transceiver capacity: While there is already a high demand for AECs/DACs, AOCs, and optical transceivers to support new AI deployments, it

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How our optical investments support AI | Arelion Blog

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The Backbone of AI: Optical Networking Deep Dive and Investment ...

Investment Thesis We believe the optical networking component industry is poised for significant growth over the coming years due to a surge in global data consumption, which we

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