



In the Battle between AMD and Nvidia for AI Chip Supremacy, the Runner-up Still Emerges Victorious

Description

In the fervently competitive environment of artificial intelligence (AI) chips, AMD (Advanced Micro Devices) finds itself in a familiar second place to Nvidia, the current market leader. AMD's well-accustomed to being the underdog, having contended with industry behemoth Intel for years in the PC and server chips market, while still managing healthy stock performance. With AI's rapid expansion, another tech duel is set for AMD and Nvidia, matching the reigning AI chips leader against a proven challenger.

Facing off to Nvidia, AMD plans to launch its MI300 AI chip as Nvidia's major AI event unfolds in San Jose, California on March 18. Nvidia plans to reveal its latest product, the B100 GPU, its first of the Blackwell series, at the GTC 2024 conference, a seminal AI developers' event.

AMD's tenacity as a credible competitor is highlighted by its enduring rivalry with Intel. Nearing bankruptcy a decade ago, AMD bounced back, reclaiming market share in PCs and servers even with Intel's continued dominance. Intel led the pack with 72.4% of total PC chip shipments in Q4 2023, followed by AMD's 18.3%. Intel further commanded the server chip market with 68.7% over AMD's 20.5%.

However, manufacturers' aversion to sole vendor lock-in has always given AMD an opening. As AI stocks rose sharply, AMD's stocks dipped 4% to 187.06 on profit-taking, while Nvidia's retreated 3.2% to 879.44.

Experts consider AMD's Instinct MI300 series a compelling substitute for Nvidia's H100 GPU, while cloud service providers and companies appreciate having a solid secondary choice to maintain competitive pricing and stimulate innovation. AI customers, often hyperscalers, prefer multiple suppliers to prevent dependency on a single provider. Nvidia's once biennial product introduction strategy has been adjusted to an annual one in response to AMD's recent acceleration into the AI accelerator market.

Insiders predict Nvidia will announce the specifics of its upcoming B100 product at GTC, aiming for a launch later this year, with plans to supersede the B100 with its X100 GPU in 2025. Other players in the industry include Intel with its Gaudi AI processors and Marvell Technology and Broadcom's custom application-specific integrated circuits, joined by AI chip startups like SambaNova Systems and Cerebras.

Even with Nvidia controlling over 90% of the GPU market due to its comprehensive solution for AI computing, AMD and Intel remain committed contenders, banking on their GPUs' sheer computational power. Piper Sandler analyst Harsh Kumar views AMD as a competitive Nvidia substitute, explaining that AMD offers both value and performance without necessarily providing predefined libraries or the full stack of software, yet they're dedicated to delivering the best performance.

Given the AI market's enormous potential, Wall Street analysts see no sign of slowing investment in data center infrastructure to bolster generative AI applications. Despite increasing competitors in this segment, Nvidia's integrated AI solutions continue to propel its significant market lead.

In conclusion, in the escalating AMD vs. Nvidia battle in AI chips, both AMD and Nvidia have been valuable bets for their shareholders. While AMD's rise doesn't match Nvidia's exceptional twentyfold upswing in the



past five years, both are indeed Wall Street stars, outperforming 99% of all stocks in terms of overall fundamental and technical strength.

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Vocabulary List:

1. **Fervently** // (adverb): With intense passion or enthusiasm.
2. **Contended** // (verb): Engaged in competition or rivalry.
3. **Behemoth** // (noun): A huge or monstrous creature.
4. **Accelerator** // (noun): A device or substance that speeds the progress or development of something.
5. **Seminal** // (adjective): Strongly influencing later developments.
6. **Dependence** // (noun): The state of relying on or being controlled by someone or something else.

Vocabulary quizzes

Multiple Choice (Select the Correct answer for each question.)



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1. What word describes something that is attractive or tempting?
Option: Encircling
Option: Enticing
Option: Deterioration
Option: Contentious
 2. Which word means deserving praise or admiration?
Option: Seminal
Option: Commendable
Option: Dismissal
Option: Fervently
 3. What term refers to a state of relying on someone or something else?
Option: Dependence
Option: Behemoth
Option: Exceedingly
Option: Dependency
 4. Which word best describes something fascinating or interesting?
Option: Feasibility
Option: Intriguing
Option: Amalgamation
Option: Geoengineering
 5. What term describes something that speeds up a process or activity?
Option: Respite
Option: Accelerator
Option: Skeptical
Option: Protostar
 6. Which word means likely to cause arguments or controversies?
Option: Contentious
Option: Fervently
Option: Amplifies
Option: Constituents
 7. Which term refers to the likelihood of something being successful or effective?
Option: Lucrative
Option: Sublimation
Option: Feasibility
Option: Protostar



8. What word means a short period of rest or relief?

- Option: Counsel
- Option: Respite
- Option: Commendable
- Option: Amalgamation

9. Which term means the process of becoming progressively worse?

- Option: Behemoth
- Option: Deterioration
- Option: Dismissal
- Option: Counsel

10. What word describes the action of combining or uniting to form a whole?

- Option: Amalgamation
- Option: Amplifies
- Option: Skeptical
- Option: Constituents

Gap-Fill (Fill in the blanks with the correct word from the vocabulary list.)

11. Investing in real estate can be very _____ if done wisely.

12. She quickly became a _____ figure in the field of medicine.

13. Beauty is in the eyes of the _____.

14. Twins are often said to be _____ since they are always together.

15. The company's code of _____ serves as a guide for employee behavior.

16. She _____ believed in the cause and dedicated all her time to it.

17. After the incident he faced immediate _____ from his position.

18. Despite the challenges she always _____ with a positive attitude.

19. The new shopping mall is a _____ of modern architecture.

20. The child had a strong _____ on his parents for support.



Matching Sentences (Match each definition to the correct word from the vocabulary list.)

21. The use of social media the spread of information.
22. The elected official listened to the concerns of his before making a decision.
23. The moat was dug the castle to protect it from invaders.
24. The of dry ice is the process of changing from a solid to a gas without becoming a liquid.
25. Her plan to climb the highest mountain impressed even the most seasoned climbers.
26. The concept of aims to manipulate the Earth's climate to counteract the effects of global warming.
27. A is a contracting mass of gas that represents an early stage in the formation of a star.
28. She was with the idea of traveling to far-off lands and experiencing new cultures.
29. The software update provided an to the user interface making it more user-friendly.
30. From its as a small startup the company has grown into a global corporation.

Answer

Multiple Choice: 1. Enticing 2. Commendable 3. Dependency 4. Intriguing 5. Accelerator 6. Contentious 7. Feasibility 8. Respite 9. Deterioration 10. Amalgamation

Gap-Fill: 11. lucrative 12. prominent 13. beholder 14. inseparable 15. ethics 16. fervently 17. dismissal 18. contended 19. behemoth 20. dependency

Matching sentence: 1. amplifies 2. constituents 3. encircling 4. sublimation 5. audacious 6. geoengineering 7. protostar 8. enamored 9. enhancement 10. inception

CATEGORY

1. Sci/Tech - LEVEL5

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