PodIntel

PodIntel Report: NVIDIA

February 07, 2025 - February 07, 2026

Research Question: What has Jensen Huang been saying on podcasts about NVIDIA's AI strategy, supply chain, and competition?
1681 podcast mentions analyzed

This report is organized in two parts. Part 1 is a deep-dive analysis synthesizing insights from the podcast mentions we found - themes, key quotes, sentiment, and information gaps. Part 2 (Appendix) contains the individual podcast mentions themselves, ranked by relevance, so you can explore the source material directly.

Part 1: Deep-Dive Analysis

Executive Summary

- **AI at the center of an "industrial revolution":** Jensen Huang consistently frames NVIDIA's role in a new AI-driven industrial revolution. He touts *accelerated computing* as transforming "$10 trillion worth" of traditional computing with AI, and describes AI reaching *every* industry from cloud data centers to robotics and cars (*Jensen Huang - Biography Flash - "Jensen Huang Dominates CES 2025 with Rubin AI Chip and His Vision for Computing's Future"*, Jan 10, 2026; *Everyone Talks to Liz Claman - "The Man Who Sees The Future: My Conversation With Nvidia CEO Jensen Huang"*, Aug 30, 2025). He frequently emphasizes that **AI will be ubiquitous**, fundamentally reshaping business and society ("every job will be changed as a result of AI") - a vision widely echoed across podcast interviews.

- **Full-stack strategy and "AI factories":** In podcasts, Huang details NVIDIA's end-to-end AI strategy: building everything from cutting-edge GPUs to software "brains" for machines. He speaks about *"AI factories"* - massive datacenters that train AI models - and notes that every industrial company will soon have **two factories**: one for physical products and one for AI "brains" in those products (*Everyone Talks to Liz Claman - "The Man Who Sees The Future: My Conversation With Nvidia CEO Jensen Huang"*, Aug 30, 2025). Multiple episodes highlight NVIDIA's broad partnerships (with businesses like Siemens, Lenovo, Uber, etc.) as part of this strategy to embed its AI technology across sectors (*Bloomberg Talks - "Nvidia, Siemens CEOs Talk Building Industrial AI Operating System"*, Jan 6, 2026).

- **Supply chain resilience is a top priority:** Huang has been unusually vocal about shoring up NVIDIA's supply chain. He praises U.S. manufacturing initiatives and even announced NVIDIA will manufacture key AI chips and supercomputers on American soil (Arizona and Texas) to meet booming demand and "strengthen the supply chain" (*Web3 Wavefronts - "Nvidia's bold move to build AI chips in the US ignites a manufacturing revolution"*, Apr 14, 2025). In one podcast he bluntly said *"without TSMC there would be no NVIDIA today,"* underscoring dependence on Taiwan's chipmaker, but he's also lauded efforts to diversify and add **"resilience, redundancy, and diversity"** to manufacturing (* GoodNightCoffee - ..., Nov 9, 2025; Audio: Communism's European Beginnings - "Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump"*, May 26, 2025).

- **Navigating geopolitics to keep chips flowing:** Huang has candidly discussed the challenge of U.S.-China tech tensions on podcasts. He warns that China is "only nanoseconds behind" the U.S. in AI chips, pushing

NVIDIA to stay ahead (*Tech News Daily - "Nvidia CEO Stresses China Chip Gap..."*, Sept 29, 2025). To preserve the Chinese market, he personally negotiated with the U.S. government - in an *"eyebrow raising"* deal - to allow chip exports to China in exchange for giving the U.S. government a 15% cut of those sales (*What Next: TBD - "Trump Dips into NVIDIA's Chips"*, Aug 15, 2025). Multiple sources marvel at Huang's role as an "amateur diplomat" threading the needle of export rules to keep NVIDIA's supply lines open in China, a move generally seen as savvy, albeit extraordinary.

- **Confident but keenly aware of competition:** On podcasts Huang exudes confidence in NVIDIA's leadership in AI, but he doesn't dismiss the competition. In fact, he's openly surprised by rivals' moves - calling AMD's recent deal to give OpenAI a 10% stake *"clever but...astonishing"* - and has strategically aligned with up-and-comers. He reveals that NVIDIA invested early in OpenAI and even Elon Musk's new AI startup (xAI), admitting "my only regret is we didn't invest more" (*Jensen Huang - Biography Flash - "Jensen Huang's AI Bets, AMD Rivalry, and Nvidia's Trillion-Dollar Future"*, Oct 11, 2025). Analysts on other podcasts note NVIDIA's **near-monopoly** in AI chips - with sky-high margins - and argue this *"sends a billboard to the world saying, compete with us."* Some foresee challengers like Tesla designing its own AI chips, or Chinese startups emerging (*HyperChange - "How Tesla Will Disrupt Nvidia "*, Jan 5, 2026), but there's broad agreement that **NVIDIA remains far in front**. Huang's comments suggest he's determined to keep it that way by funding key players and pushing ever-faster innovation.

Key Findings

1. An AI Revolution Led by NVIDIA

What Huang says: Jensen Huang consistently casts NVIDIA's work as part of an epochal technological shift. In an interview with Fox's Liz Claman, he declared *"we are at the beginning of the AI revolution,"* describing how AI breakthroughs mean it can now reason, use tools, and is "going into every industry" - from cloud services to industrial automation to self-driving cars (*Everyone Talks to Liz Claman - "The Man Who Sees The Future: My Conversation With Nvidia CEO Jensen Huang"*, Aug 30, 2025). At CES 2026, Huang's keynote hammered home that **computing has been "fundamentally reshaped" by AI** - he cited roughly $10 trillion of existing compute infrastructure now being transformed by accelerated computing and AI, implying enormous growth ahead (*Jensen Huang - Biography Flash - "Jensen Huang Dominates CES 2025 with Rubin AI Chip and His Vision for Computing's Future"*, Jan 10, 2026). Across at least **half a dozen podcasts**, Huang's vision of AI as the driving force of a new industrial era comes up repeatedly. There's a strong consensus in these sources that Huang is evangelizing AI's potential in society - one host noted he's "incredibly bullish" and even critics of the AI hype cycle acknowledge NVIDIA's real gains. No podcast source presented a contrary view to Huang's optimism on this front; the general tone is that **NVIDIA's CEO is a true believer in AI's world-changing power**, and he's aligning his company accordingly.

2. Full-Stack Strategy: "AI Factories" and Big Partnerships

What the sources say: A major theme is how Huang portrays NVIDIA's strategy as an *end-to-end* AI platform, not just a chip supplier. On Bloomberg's tech podcast, for instance, Huang outlined a "five-layer cake" of technology: starting from GPUs, then adding software and simulation, up to industry-specific applications. He described a landmark partnership with Siemens to create an **industrial AI operating system**, integrating NVIDIA's AI into Siemens software for factory automation (*Bloomberg Talks - "Nvidia, Siemens CEOs Talk Building Industrial AI Operating System"*, Jan 6, 2026). On stage at that event, Huang gave concrete examples: NVIDIA is accelerating Siemens's design and simulation tools with GPUs and using Siemens' systems in NVIDIA's own "AI factories" (the data centers that train AI models), even collaborating on factory-floor robotics with partners like Foxconn (*Bloomberg Talks - "Nvidia, Siemens CEOs Talk Building Industrial AI Operating System"*, Jan 6, 2026).

Multiple podcasts (including *Fox on Tech* and *Biography Flash*) highlight Huang's rhetoric about **"AI factories."** He explains that every major company might soon have two factories - one that produces goods and **"a factory that does the AI... to create the brain that runs in the robot"* - and emphasizes that NVIDIA's portfolio covers "the entire spectrum of computing for AI... from the cloud to enterprise on-prem to robotic systems" (*Everyone Talks to Liz Claman - "The Man Who Sees The Future: My Conversation With Nvidia CEO Jensen Huang"*, Aug 30, 2025). At least** 3-4 sources **(ranging from news briefs to deep-dive interviews) describe this full-stack approach and Huang's partnerships in telecom, automotive, and supercomputing: e.g. teaming with** Nokia on 6G networks and Uber on self-driving taxis **(from his GTC keynote) shows NVIDIA planting roots in many fields (*FOX on Tech - "Nvidia GTC Addresses AI Developments"*, Oct 31, 2025). The consensus across these podcasts is that** NVIDIA's AI strategy is not just selling chips, but building an ecosystem **- hardware, software, and alliances - to make its platform indispensable. No guests or hosts voiced disagreement with this strategy; in fact, many explicitly praise how *holistic* and far-reaching it is. If anything, the note of caution was whether this breadth brings Nvidia into competition with customers, but that angle was largely absent in the podcast discussions.**

3. Tackling Supply Chain Challenges Head-on

What the sources say: In contrast to many CEOs, Huang frequently addresses supply chain issues in public. Several podcasts recount NVIDIA's moves to secure chip supply and manufacturing capacity. One standout example is an April 2025 episode reporting NVIDIA's plan to **produce AI chips and even entire supercomputers in the United States** for the first time - taking over 1 million square feet in Arizona (for chip production) and Texas (for assembling AI supercomputers). Huang is quoted expressing optimism that U.S. manufacturing will "help meet the rising demand for AI chips... while strengthening the supply chain," amid government efforts to ease tech tariffs (*Web3 Wavefronts - "Nvidia's bold move to build AI chips in the US ignites a manufacturing revolution"*, Apr 14, 2025). This move is discussed in the context of evolving trade policies, suggesting Huang is proactively reducing reliance on Asia given geopolitical risks.

Huang also talks about *supply chain resilience* in geopolitical terms. In one podcast he **praised U.S. government support** for domestic tech manufacturing, saying initiatives to bolster American semiconductor production are "excellent" for ensuring *"real resilience, redundancy, and diversity in our manufacturing supply chain."* Notably, he made those remarks abroad at a Swedish event - a clip replayed in a news podcast - where he aligned NVIDIA's goals with national policy (essentially thanking leaders for helping Nvidia build more in the U.S.) (*Audio: Communism's European Beginnings - "Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump"*, May 26, 2025). Another concrete example came from an Asia-based podcast: Huang visited TSMC in Taiwan in late 2025 and **personally asked** the CEO for more capacity. He publicly stated that NVIDIA's growth "keeps accelerating every month" and "without TSMC there would be no NVIDIA today," urging TSMC to boost output of 3nm wafers to feed NVIDIA's new **Blackwell** AI chips (* GoodNightCoffee - ():...*, Nov 9, 2025). This was corroborated by TSMC's CEO, and Huang noted memory suppliers (Samsung, Hynix, Micron) were also scaling up to support NVIDIA.

How many and consensus: Supply chain topics surface in **numerous podcasts** - from U.S. tech policy shows to international tech roundups. The consensus is that Huang is both frank and proactive about supply issues: hosts often underscore that **demand for NVIDIA chips far outstrips supply**, and they portray Huang as scrambling to alleviate bottlenecks (a good problem to have, as one commentator joked). No podcast gave a dissenting take on these efforts; if anything, there's a sense of admiration at how aggressively NVIDIA is investing in capacity (one called it a "manufacturing revolution"). The only subtle note of tension is the sheer dependency on TSMC - a **single point of failure** - but even there Huang's own acknowledgment of TSMC's importance set the tone, and the sources did not suggest an alternative path. In short, Huang's message of *"we're doing everything we can to shore up our supply chain"* comes through loud and clear, and is generally received as a prudent strategy.

4. Geopolitics: Huang's Balancing Act with China and the U.S.

What the sources say: Jensen Huang has been unusually candid about the geopolitical tightrope NVIDIA must walk. In multiple podcasts, he emphasizes two seemingly conflicting points: **China is a crucial market and tech power, but U.S. rules are the gatekeeper.** A late 2025 news briefing cited Huang saying that China's domestic chip progress is extremely fast - *"only nanoseconds behind the U.S."* - and highlighted how major Chinese firms (like Huawei, Tencent) are developing their own AI chips. Huang's view, as relayed there, is that he hopes China remains open to foreign tech because it benefits everyone, but he's clearly aware that Chinese competitors are not far behind (*Tech News Daily - "Nvidia CEO Stresses China Chip Gap..."*, Sept 29, 2025).

Most striking are the stories of how Huang engaged with the U.S. government to keep selling to China. Several podcasts (from **Slate's tech show to AI industry briefings**) recount how Huang personally lobbied the Trump administration for months in 2024-25 when export bans threatened NVIDIA's ability to ship its high-end H20 AI chips to Chinese customers. In what one host called an *"amateur diplomat"* role, Huang managed to secure a compromise: NVIDIA (and AMD, following suit) would be allowed export licenses for advanced chips, **but 15% of the revenue from those China sales goes to the U.S. government** as a fee/tariff. One podcast episode titled *"Trump Dips into NVIDIA's Chips"* dramatizes this negotiation - describing how Trump initially demanded 20%, and Huang bargained it down to 15% in a direct conversation with the President (*What Next: TBD - "Trump Dips into NVIDIA's Chips"*, Aug 15, 2025). The deal was indeed eyebrow-raising; as the Wall Street Journal reporter on that podcast put it, NVIDIA's CEO basically agreed to "give a sizable chunk of its sales to the U.S. government" to maintain access to China's AI market. Another podcast noted that Huang had pledged to invest $500 billion in U.S. initiatives (a staggering figure) as part of convincing officials, highlighting how far he was willing to go (*The AI Daily Brief - "Who Thinks There's an AI Bubble?"*, Aug 12, 2025).

How many and consensus: At least **4-5 sources** cover the China export saga and Huang's comments on Chinese competition. The sentiment is generally one of respect - even amazement - at Huang's deftness. He's been called a "**magic tailor**" in China for tailoring solutions to both sides, a nickname one podcast cited to illustrate how he kept both Chinese partners and U.S. regulators "mostly happy" (*What Next: TBD - "Trump Dips into NVIDIA's Chips"*, Aug 15, 2025). No podcast overtly criticized Huang for this deal; instead, it's presented as a savvy maneuver to navigate impossible constraints. There is an undercurrent of recognizing the **precariousness**: NVIDIA's fortunes are now deeply entangled with geopolitics. But Huang's public stance - praising the U.S. for allowing some sales, stressing the huge $50 billion market in China, and urging that American tech "standard" should be everywhere - is reported consistently. In sum, sources agree Huang is walking a fine line with skill and **openness**. If anything is missing, it's dissenting voices: the podcasts did not include, say, U.S. national security critics who might oppose selling advanced chips to China. Within the scope of these sources, Huang's balancing act is seen as necessary and astute.

5. Competition: Aware of Threats, Betting on the Ecosystem

What the sources say: On the topic of competition, Jensen Huang strikes a confident tone but reveals a keen awareness of potential threats. He often points out, implicitly, that **NVIDIA's lead is self-reinforcing** - for example, telling analysts that demand for AI compute "keeps accelerating and compounding" and that NVIDIA has entered a *"virtuous cycle of AI"* where its ecosystem only grows stronger as more startups and industries adopt its platform (*What Next: TBD - "Trump Dips into NVIDIA's Chips"*, Aug 15, 2025). This suggests he sees competitors facing a steep uphill battle. Indeed, in one podcast, the host quotes Huang's declaration that **GPU sales for AI are essentially a monopoly right now** - NVIDIA was making "60% profit margins" and virtually every major AI player from OpenAI to Google had no choice but to buy NVIDIA chips (*HyperChange - "How Tesla Will Disrupt Nvidia "*, Jan 5, 2026). That monopoly status, as Huang and others acknowledge, makes NVIDIA a target. He famously likes the Jeff Bezos adage "your margin is my opportunity," implying he expects others are gunning for NVIDIA's high-profit business (*HyperChange - "How Tesla Will Disrupt Nvidia "*, Jan 5, 2026).

Huang's actions speak to an **ecosystem defense strategy**: rather than ignore upstarts, he invests in them. On an October 2025 "Biography Flash" podcast, we learn Huang *"candidly"* admitted that **his only regret was not betting bigger on OpenAI and Musk's new AI venture (xAI)**. He revealed NVIDIA had invested in these companies (he personally funded xAI's round) and wished he'd contributed more, calling Musk's xAI one of the "AI titans" that will reshape tech's infrastructure (*Jensen Huang - Biography Flash - "Jensen Huang's AI Bets, AMD Rivalry, and Nvidia's Trillion-Dollar Future"*, Oct 11, 2025). Importantly, Huang clarified these bets are strategic, *"not just to boost GPU sales,"* suggesting he wants to ensure the most promising AI players still rely on NVIDIA's tech without binding them in onerous deals. In the same conversation, Huang reacted to news of rival AMD's bold partnership with OpenAI (AMD agreed to give OpenAI up to a 10% equity stake in exchange for huge chip orders). He called AMD's move *"clever"* but admitted it was **surprising** - essentially expressing astonishment that a competitor would give away equity before their next-gen chips even launch (*Jensen Huang - Biography Flash - "Jensen Huang's AI Bets, AMD Rivalry, and Nvidia's Trillion-Dollar Future"*, Oct 11, 2025). This is one of the rare instances we hear Huang directly discuss a specific competitor's tactic. It shows he's closely watching moves that could erode NVIDIA's dominance (OpenAI was one of NVIDIA's biggest customers, now courted by AMD).

How many and consensus: Competition comes up in **numerous podcasts**, though often via analysts and hosts rather than Huang listing rivals. The consensus is that **NVIDIA is well ahead, but not alone**. Many sources (investor-focused podcasts, tech analysts) agree that startups and big incumbents alike are aiming to "chip away" at NVIDIA's lead - whether that's Tesla designing an AI chip for self-driving, Google with its TPUs, or Chinese firms like Biren and Huawei developing homegrown GPUs. However, there's also a general agreement (sometimes explicitly stated, sometimes implied in financial results) that **NVIDIA's advantage won't be easily toppled**. For instance, one investing podcast noted how AMD's AI chip ambitions have so far lagged expectations, and how hype around a Chinese AI chip (DeepSeek) briefly spooked the market but didn't change fundamentals (*Investing Experts - "DeepSeek isn't new, Nvidia concerns, downgrading AMD..."* Feb 13, 2025). There is some **divergence in tone**: a few commentators caution that NVIDIA's valuation and hype could be a bubble and that eventually competition (or a tech shift) will cut into those margins. On the other hand, personalities like Jim Cramer (on CNBC via podcast) gush that NVIDIA is "the greatest [tech] story of all time" - asserting that competitors won't unseat "the king" of this AI era and that we're witnessing an industrial revolution with NVIDIA at the helm (CNBC's *Squawk on the Street*, referenced in *Investing Experts* podcast, Feb 13, 2025). Huang himself, in all cited appearances, doesn't dismiss the existence of competition but projects *strategic confidence*. He often doubles down on how NVIDIA's continuous innovation (e.g. the next-gen *Rubin* AI super-chip unveiled at CES) will keep it ahead. Notably, **no podcast source indicates Huang bad-mouthing any competitor** - his style is more to highlight NVIDIA's strengths and occasionally express surprise at others' strategies. The overall sentiment is that **Huang is mindful of challengers but believes NVIDIA's lead is durable** - and so far, podcast commentators largely agree, even as they speculate on who or what might be "the next NVIDIA" down the road.

Notable Quotes & Insights

- **"Compute demand keeps accelerating and compounding across training and inference, each growing exponentially. We've entered the virtuous cycle of AI, and the AI ecosystem is scaling fast... AI is going everywhere, doing everything at once."**

Source: What Next: TBD - "Trump Dips into NVIDIA's Chips" (Aug 15, 2025). (This quote, attributed to Jensen Huang, captures his almost exuberant view of NVIDIA's position in the AI boom. It underscores why Huang is so bullish - in his eyes, demand for AI compute feeds on itself in a feedback loop that will drive NVIDIA's growth across every sector.)*

- **"Every single robotic or industrial company will have two factories. There's the factory that builds the machines, and then there will be a factory that does the AI - the AI factory - to create the brain that runs in the robot... NVIDIA covers the entire spectrum of computing for AI, everything from the cloud to enterprise on-prem to robotic systems."**

Source: Everyone Talks To Liz Claman - "The Man Who Sees The Future: My Conversation With Nvidia CEO Jensen Huang" (Aug 30, 2025). (Huang's own words here illustrate NVIDIA's full-stack strategy in a vivid way. By explaining the "two factories" concept, he's essentially saying NVIDIA wants to be inside that second factory for every company. It matters because it shows how Huang pitches NVIDIA not just as a chip maker, but as the **brains behind the coming wave of intelligent machines** in industry.)*

- **"Manufacturing in the United States, securing our supply chain, having real resilience, redundancy, and diversity in our manufacturing supply chain - all of that is excellent."**

Source: Audio: Communism's European Beginnings - "Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump" (May 26, 2025). (In this remark, Jensen Huang openly applauds U.S. efforts to bolster domestic chip production. It's a notable quote because tech CEOs often avoid political statements - yet here Huang is explicitly aligning with policy goals to fortify supply chains. This candid support hints at how critical supply chain security is to NVIDIA's strategy, and how Huang is willing to cooperate with governments to achieve it.)*

- **"Without TSMC, there would be no NVIDIA today."**

Source: GoodNightCoffee - ... (Nov 9, 2025). (This blunt admission from Huang - spoken during a visit to TSMC in Taiwan - underscores NVIDIA's reliance on its key supplier, the Taiwan Semiconductor Manufacturing Co. It's a strikingly transparent quote: the CEO of NVIDIA flat-out stating his company owes its existence to a partner. This insight matters because it highlights the **supply chain fragility** behind NVIDIA's success and why Huang is investing in alternatives (like U.S. plants) while also nurturing the TSMC relationship.)*

- **"One of the things that we did - we invested in OpenAI early on. My only regret is that we didn't invest more... The only regret I have about xAI - we're an investor already."**

Source: Jensen Huang - Biography Flash - "Jensen Huang's AI Bets, AMD Rivalry, and Nvidia's Trillion-Dollar Future" (Oct 11, 2025). (Here we have Huang in a reflective mode during a CNBC interview, essentially saying he wishes he'd put even **more** money into the transformative AI companies of our time. This quote is insightful for two reasons: First, it reveals Huang's deep conviction in the AI revolution - he clearly thinks even huge successes like OpenAI will grow far bigger. Second, it shows NVIDIA's strategy of **coopetition**: Huang invests in companies that use NVIDIA's chips (and could in theory use rivals'), suggesting he'd rather be financially and strategically tied to every major AI player than risk being shut out. It's an unusually candid statement about "regret," showing Huang's awareness that NVIDIA's fortunes rise with the whole AI ecosystem.)*

- **"China is only nanoseconds behind the U.S. in the industry."**

Source: Tech News Daily - "Nvidia CEO Stresses China Chip Gap..." (Sept 29, 2025). (This pithy quote from Huang, likely drawn from a media briefing, is striking for its acknowledgement of China's rapid progress in AI chips. It matters because it's Huang essentially warning that America's lead in semiconductors is razor-thin. Coming from NVIDIA's chief, who has a foot in both U.S. and Chinese tech spheres, it's a sober reminder that NVIDIA's competition is not just AMD or*

Intel - it's also an entire nation's tech sector. That context adds urgency to Huang's push for speed and scale in NVIDIA's strategy.)

Sentiment & Consensus

Overall sentiment: The sentiment across these podcast sources toward Jensen Huang and NVIDIA's trajectory is **largely positive, bordering on admiring.** Huang is frequently depicted as a visionary CEO and even a history-making figure ("the face and force behind the global surge in AI," as one profile put it). Hosts and journalists often note his charismatic analogies (the "five-layer cake," "AI factory" etc.) and tend to share in the excitement about NVIDIA's advances. In many episodes, especially those following NVIDIA's blowout financial results, the tone is almost reverential - amazement at record sales, stock surges, and Huang's seemingly prescient bets. For instance, after one earnings call where Huang raised guidance dramatically, a podcaster quipped that for all the talk of an AI bubble, **NVIDIA "just keep making more money"** and proving doubters wrong. This reflects a general consensus: **NVIDIA is the dominant leader of the AI boom, and Huang is driving it masterfully.**

Points of agreement: Sources broadly agree that NVIDIA has an unparalleled position in the market (virtually a monopoly in AI chips for now) and that Huang's strategies - whether technological (full-stack development) or political (navigating export rules) - have been highly effective. There's consensus that **demand for NVIDIA's AI hardware is real and soaring**, not merely hype. Even podcasts that pose questions about "an AI bubble" tend to conclude that NVIDIA's growth is backed by tangible adoption of AI. Another area of strong agreement is admiration for Huang's **clarity of vision**: multiple hosts comment on how coherent and bold his narrative of the future is. There's also little debate that NVIDIA's dependence on partners like TSMC or markets like China is a critical issue - virtually everyone acknowledges it, and Huang's efforts to mitigate risk (like U.S. manufacturing, diplomatic negotiations) are seen as prudent and necessary.

Areas of divergence: There is relatively **little overt disagreement** with Huang's own statements in these podcasts - perhaps because many of these appearances and discussions are somewhat curated or favorable to NVIDIA. However, subtle tensions do emerge. One is the question of **sustainability**: A few voices (often finance-focused podcasts or segments quoting analysts) wonder if NVIDIA's extraordinary margins and valuation can last as competition catches up. For example, the *HyperChange* episode entertains the idea that Tesla or others could disrupt NVIDIA's dominance; and an *Investing Experts* segment noted that some investors were spooked by a new Chinese AI chip's debut. While these don't directly contradict Huang, they inject a note of caution that **not everyone is 100% sold on unlimited growth** - some are cautious that "the king" could eventually be challenged. Additionally, where Huang emphasizes cooperation with China, not all observers outside these podcasts might agree; but within our sources, no one takes a nationalist or hardline counterpoint. The closest thing to a contrarian podcast view was general talk of an "AI bubble" - is enthusiasm (and spending) outpacing reality? A show called *The AI Daily Brief* raised this question, but even there, NVIDIA's results were used to counter the bubble narrative (record revenue tends to win the argument).

Notable contrarian views: While the majority of the podcast coverage is optimistic, two subtle contrarian perspectives emerged: First, there's the **"bubble skeptic"** view - some analysts warn that at some point the AI frenzy (and NVIDIA's stock) could overheat. This doesn't criticize Huang per se, but it questions the froth in the market that has benefited NVIDIA. Second, there's the **competitive realist** view - typified by the HyperChange host and a few others - which argues that NVIDIA's huge profits *will* draw serious challengers (be it Tesla building its own chips, AMD's partnership with OpenAI, or open-source AI models reducing dependence on NVIDIA over time). These commentators aren't saying NVIDIA is in immediate danger, but they urge listeners to remember that technology leadership is a moving target. It's a minority view in the sources to date; most analysts in these podcasts still put their money on NVIDIA's continued leadership for the foreseeable future. In fact, several sources push back against the contrarians by framing NVIDIA as analogous to past tech giants that created entire new markets (and implying Huang's company has a long runway before any "next Nvidia" truly threatens it).

Overall consensus: Summing up the sentiment, the consensus among the podcasts is that **Jensen Huang is a visionary CEO executing an aggressive, effective AI strategy, and that NVIDIA's current dominance is well-earned.** The tone is far more often astonishment and admiration than skepticism. Even topics that could invite criticism - e.g. Huang's close dealings with China - are presented in a pragmatic light (as savvy problem-solving). If you're a prospective customer of NVIDIA, the "real story" these sources tell is one of a company that is *extremely* confident, far ahead of competitors right now, and led by someone who both talks and delivers big. The lack of harsh disagreement or negative sentiment in the sources suggests that, at least in the podcast world, NVIDIA's narrative is largely accepted. Any cautionary notes are about the future - essentially **"can anyone catch up?"** - rather than faults in NVIDIA's current strategy.

Information Gaps

Despite the rich insights from podcasts, **several aspects are not well covered** in these sources:

- **Specifics on direct competitors:** While we hear Huang's broad thoughts on competition, the podcasts rarely delve into NVIDIA's head-to-head comparisons with specific rivals like **Intel, Google, or up-and-coming chip startups**. For example, there's little mention of Google's TPU chips or Amazon's in-house AI chips, which are real-world competitors. Huang doesn't comment on these in the podcast data, so we don't learn how NVIDIA views those threats. Additional research (e.g. press interviews or analyst reports) would be needed to gauge NVIDIA's position against those rivals. Similarly, the coverage of AMD is mostly around the OpenAI equity deal; we don't get Huang's perspective on AMD's technical challenge (say, how NVIDIA's GPUs stack up against AMD's MI300 series). Those looking for a **competitive product-by-product analysis** won't find it in these podcasts.

- **Unaddressed risks and criticisms:** The curated podcast material paints a very optimistic picture. **Missing are critical or skeptical viewpoints** on NVIDIA's strategy from within these episodes. For instance, topics like the *power consumption* of AI supercomputers, the *high costs* of NVIDIA's hardware, or potential *ethical concerns* (e.g. AI arms race implications) are largely absent. Huang doesn't talk about any downsides or mistakes in these recordings, and hosts didn't press him on controversies (like the previous failed ARM acquisition attempt, or any workforce issues). Those issues might matter to a comprehensive view of "the real story," but the podcast sources don't shed much light on them. Future reporting or investigative pieces would need to explore those angles beyond what Huang himself says.

- **Supply chain vulnerability scenarios:** While Huang emphasizes solutions (like U.S. manufacturing and TSMC cooperation), the podcasts don't explicitly discuss worst-case scenarios - for example, *what if* TSMC's supply was cut off (due to geopolitical conflict in Taiwan) or if export rules tighten again. Huang's comments imply concern, but neither he nor the hosts articulate what NVIDIA's fallback would be in a crisis. This could be a gap for readers interested in how robust NVIDIA's supply chain really is under extreme conditions. Supplementing this with analysis from defense or supply chain experts might be necessary.

- **Customer perspective and reception:** The podcasts focus on Huang's voice and analysts' views, but we don't hear from **enterprise customers or developers** in these sources. Questions like "How do cloud providers or startups feel about NVIDIA's high prices and dominance?" or "Are any customers actively seeking alternatives?" aren't directly answered in the podcast transcripts. That's a gap if the reader wants the full picture of NVIDIA's market stance. It would be worth researching industry surveys or interviews with CEOs of AI startups, cloud companies, etc., to see if there's discontent or strong loyalty towards NVIDIA that isn't captured in Huang's own messaging.

- **Future roadmaps beyond what's stated:** Huang talks about current initiatives (like the Rubin platform, new partnerships) but doesn't divulge much about **long-term bets** in these clips beyond generalities. For instance, references to quantum computing (NVIDIA's interest in a startup) appear in one brief, but Huang himself hasn't spoken about it here. We might need to look at NVIDIA's investor days or research papers to understand what's next in AI after GPUs - are they investing in AI software services, brain-like chips, etc., which he hasn't discussed in podcasts? That information would complement what we know from Huang's public statements.

Additional research needed: To fill these gaps, a few avenues would be helpful. One is reviewing **NVIDIA's earnings call transcripts and investor presentations** - these often contain more direct Q&A about competition and supply chain risk (and executives like CFO Colette Kress might give a different angle than Huang's public optimism). Another is seeking **independent analyses or journalism** on NVIDIA's supply chain (for example, reports on how reliant NVIDIA is on certain suppliers, or how customers feel about NVIDIA's pricing and backlog). Finally, given Huang's emphasis on policy, checking recent **government reports or policy-analysis podcasts** could reveal how regulators view NVIDIA's power in the AI ecosystem - something the provided podcasts didn't critique. In summary, the podcasts gave us Jensen Huang's narrative and enthusiastic external commentary; further research should seek out the less rosy perspectives and hard numbers to balance the story.

Part 2: All Analyzed Mentions

Sorted by relevance score. 1681 mentions total.

1. AI News Daily

Episode: Nvidia Adapts AI Chip for China, Nvidia Invests in Quantum Computing, JFrog and NVIDIA Boost AI Deployment, NVIDIA Launches RTX PRO Servers, and more...
Date: 2025-05-19 | Relevance: 95/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic moves in adapting its AI chip for the Chinese market due to U.S. export controls, highlighting CEO Jensen Huang's visit to Beijing and plans for a new AI GPU based on Blackwell architecture. It also covers NVIDIA's strong financial performance, strategic investment talks in quantum computing startups, and its efforts to navigate regulatory challenges and competition in China.

"CEO Jensen Huang recently visited Beijing, emphasizing the importance of this market and projecting potential growth to reach $50 billion in the next few years."

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2. Earnings Education

Episode: NVIDIA | 1st Quarter FY26 Financial Results | May 28, 2025
Date: 2025-05-29 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The NVIDIA Q1 FY26 earnings call discusses the strong ramp-up and deployment of NVIDIA's Blackwell GPUs, including the GB200 and upcoming GB300 models, highlighting key customer deployments and significant increases in AI inference demand, particularly from Microsoft and OpenAI. The discussion also covers NVIDIA's product roadmap through 2028, emphasizing continual product innovation and high customer alignment.

"Microsoft, for example, has already deployed tens of thousands of Blackwell GPUs and is expected to ramp to hundreds of thousands of GB200s with OpenAI as one of its key customers."

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3. Breaking Analysis with Dave Vellante

Episode: Nvidia Resets the Economics of AI Factories, Again
Date: 2026-01-10 | Relevance: 95/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides an in-depth analysis of Jensen Huang's announcements at CES 2026, highlighting how NVIDIA is redefining AI factory economics with significant performance improvements and solidifying its leadership role in AI hardware and software innovation. It also discusses competitive dynamics with other silicon companies and implications for ecosystem partners and customers.

"Today, Nvidia is driving annual performance improvements of 5x, throughput of 10x, and driving token demand of 15x via Jevons Paradox."

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4. Jensen Huang - Biography Flash

Episode: Jensen Huang: Nvidia's AI Visionary | Biography Flash
Date: 2025-09-13 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses NVIDIA's AI strategy including ambitious market forecasts, upcoming chip architecture innovations, and the concept of sovereign AI, emphasizing NVIDIA's dominant position in AI infrastructure and its future growth potential.

"Worldwide AI infrastructure spending could soar to as much as $4 trillion by the end of the decade, with NVIDIA itself potentially capturing as much as $1 trillion in opportunity."

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5. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang Unveils AI Megachip at CES While China Opens Doors to NVIDIA Tech Empire
Date: 2026-01-31 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast extensively covers NVIDIA's CEO Jensen Huang unveiling the Rubin AI platform at CES 2026, highlighting significant advancements in AI chip technology, partnerships, and AI scaling across industries. Coverage includes Huang's engagements and statements at major events like Davos World Economic Forum and business developments in China, highlighting NVIDIA's impact on AI and infrastructure investment.

"He called AI a five-layer cake, fueling the largest infrastructure buildout ever, 85 trillion over 15 years, spawning jobs from plumbers to programmers."

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6. Hired!

Episode: The Man Who Sees The Future: My Conversation With Nvidia CEO Jensen Huang
Date: 2025-08-30 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features an in-depth conversation with NVIDIA CEO Jensen Huang discussing the company's strong AI-driven growth, record-breaking sales, the launch of the next-generation Blackwell AI supercomputer, and challenges in chip sales to China amid geopolitical issues.

"We launched the second generation of the revolutionary Blackwell architecture. It's the first of its kind type of AI supercomputer. This is the second generation of Blackwell. We call Blackwell Ultra. The codename is GB300. Everybody calls it that. And we ramped $10 billion worth of GB300 in the first quarter."

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7. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang Dominates CES 2025 with Rubin AI Chip and His Vision for Computing's Future
Date: 2026-01-10 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's keynote at CES 2026, highlighting NVIDIA's new Rubin AI platform, its advancements in AI computing, and Huang's vision of AI's future, emphasizing cost reduction and broad industrial partnerships.

"He unveiled Rubin, the company's next-generation, extreme co-designed six-chip AI platform, now in full production, and pitched as the successor to Blackwell and the new engine of his legacy."

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8. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang's AI Bets, AMD Rivalry, and Nvidia's Trillion-Dollar Future
Date: 2025-10-11 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang discusses NVIDIA's leading role in AI, his investment strategy including backing OpenAI and Elon Musk's XAI, and his perspectives on competition, notably AMD's recent strategic moves involving OpenAI equity. He highlights NVIDIA's substantial market cap and AI-driven growth while candidly expressing regret over not investing more in promising AI ventures.

""The company is on the front lines of the AI race, candidly admitting his only regret is not betting even bigger on OpenAI and Elon Musk's XAI.""

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9. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang's AI Diplomacy, Thor Robot Brain, and TSMC Nod
Date: 2025-08-30 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses NVIDIA's AI diplomacy, including ongoing negotiations with the US government on chip sales to China, the launch of the powerful Jetson-Thor AI module for robotics, and the competitive challenges posed by export restrictions and geopolitical tensions. He emphasizes NVIDIA's role in advancing AI technology and its potential impact on productivity and work culture.

"I made it clear that having the world build AI on American technology stacks is critical for US competitiveness."

10.

Episode: NVDA?AI
Date: 2025-12-24 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic AI semiconductor partnership with startup Glock, including technology licensing and acquiring key talent, highlighting NVIDIA's dominance and savvy strategy to maintain their leadership in AI chips. The analysis covers NVIDIA's approach to AI inference chip innovation, competition management, and supply chain expansion through this significant collaboration.

""NVIDIA""

11.

Episode: :200
Date: 2026-01-22 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: This podcast episode provides an insightful analysis of NVIDIA's AI strategy, focusing on its shift from AI model training to dominating the AI inference market. It discusses NVIDIA's significant investments in startups like BaseTen and in acquiring Groq to strengthen their inference infrastructure and chip capabilities, positioning NVIDIA to control the expanding AI inference ecosystem and fend off competition.

""NVIDIAAI""

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12. The Drill Down

Episode: Drill Down Earnings, Ep. 342: NVIDIA Q1 earnings analysis - what you need to know ($NVDA)
Date: 2025-05-29 | Relevance: 95/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast provides an in-depth analysis of NVIDIA's Q1 earnings, highlighting strong revenue growth driven by data center demand but notes a significant margin hit due to China export bans impacting H20 chip sales. It also covers product launches, shipment volumes, and evolving customer use of AI inference.

"They said they lost $2.5 billion in sales of their H20 chips, which are designed specifically to go into China no more. They expect ultimately in Q2 an $8 billion impact."

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13. We Study Billionaires - The Investor's Podcast Network

Episode: TIP704: The Nvidia Way w/ Tae Kim
Date: 2025-03-07 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode features Tae Kim discussing his book 'The Nvidia Way,' covering NVIDIA's leadership under Jensen Huang, its unique company culture, dominance in AI and GPU markets, and the strategic preparation for the AI revolution. The discussion includes insights from Jensen Huang and other key figures involved in NVIDIA's journey.

"Jensen has prepared Nvidia to dominate the AI revolution, how Nvidia essentially invented the GPU market, why Jensen has 60 managers reporting to him while the typical company their size might have a handful."

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14. Have AI Nice Day!

Episode: Jensen Huang on Robotics, AI, and What's Next: Reality Distortion Optional
Date: 2025-02-08 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang, NVIDIA's CEO, discusses the company's advancements in AI, highlighting their robotics initiatives using the Omniverse platform, the digital biology applications for healthcare, and ambitious visions such as creating a digital twin of Earth for climate change prediction. He emphasizes NVIDIA's role in driving AI innovation across industries and the development of immersive virtual worlds like the metaverse.

""NVIDIA is already like a major player in the AI world and their tech is changing everything, you know?""

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15. Everyone Talks To Liz Claman

Episode: The Man Who Sees The Future: My Conversation With Nvidia CEO Jensen Huang
Date: 2025-08-30 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang, NVIDIA CEO, discusses the company's record-breaking sales, strong demand driven by AI adoption across industries, the ramp-up of their new Blackwell Ultra AI supercomputer (GB300), and supply chain challenges related to chip sales restrictions in China.

"We ramped $10 billion worth of GB300 in the first quarter. And next quarter, we're going to ramp really, really hard."

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16. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang Delivers Record $57 Billion Quarter While Joking About Losing $500 Billion in Market Cap
Date: 2025-11-22 | Relevance: 95/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses NVIDIA's record-breaking $57 billion quarter, the company's critical role in AI computing infrastructure, and addresses market speculation about an AI bubble, emphasizing strong demand for NVIDIA chips among cloud companies.

"Nobody in history has ever lost $500 billion in a few weeks. You've got to be worth a lot to"

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17. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang Takes AI Revolution from Vegas to Shanghai in Epic Global Tech Tour
Date: 2026-01-24 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast details Jensen Huang's AI strategy for NVIDIA, highlighting his keynotes at CES 2026 and the World Economic Forum where he unveiled new AI platforms like Rubin, Cosmos, and Drive Hyperion. It underscores NVIDIA's leadership in AI infrastructure, partnerships with companies like Toyota and Siemens, and the economic impact of AI development.

"Huang framed AI as a five-layer cake, from energy to apps, fueling the largest infrastructure build-out ever, $85 trillion over 15 years, creating six-figure gigs for plumbers, electricians, and coders."

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18. Bloomberg Talks

Episode: Nvidia CEO Jensen Huang Talks Earnings, AI Growth Outlook, China Market
Date: 2025-05-29 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the company's strong AI demand, particularly driven by reasoning AI inference workloads, details supply chain challenges related to China, and comments on the competitive landscape including Chinese competitors and technology limitations. He highlights the success of NVIDIA's Blackwell architecture and the strategic importance of maintaining competitive and valuable data center chips.

"The biggest one, of course, is the reasoning AI inference. The demand is just off the charts. You see the popularity of all these AI services now. ChatGPT, Gemini, you know, so on and so forth. Grok. I mean, they're just doing incredibly well across the board."

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19. Jensen Huang - Biography Flash

Episode: Jensen Huang Biography Flash: Nvidia CEO's DC Power Play Reshapes AI Export Rules and Tech Policy
Date: 2025-12-30 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast covers Jensen Huang's recent efforts to lobby against US export restrictions on AI chips to China, highlighting his influence on tech policy and NVIDIA's strategic positioning amid global AI competition. It also previews NVIDIA's upcoming product announcements and Huang's role as a visionary leader in AI and accelerated computing.

"Heheadlined a fireside chat at the Center for Strategic and International Studies, railing against US chip export curbs to China, calling it conceding the world's second-largest AI market to local rivals."

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20. Bloomberg Daybreak: Asia Edition

Episode: Nvidia's Upbeat Forecast, A Conversation with CEO Jensen Huang
Date: 2025-11-20 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the company's strong sales, supply chain strategy, and robust demand for their AI accelerators. He highlights sold-out inventory of Blackwell GPUs, collaborations with key suppliers, and a confident revenue forecast for the upcoming period.

""Sales are off the charts for Blackwell and Nvidia GPUs in the cloud are sold out... But we've planned our supply chain incredibly well. We have the largest supply chain in the world.""

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21. Jensen Huang - Biography Flash

Episode: Jensen Huang's AI Dominance: NVIDIA's Meteoric Rise | Biography Flash
Date: 2025-10-18 | Relevance: 95/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast highlights Jensen Huang's recent appearances and comments focusing on NVIDIA's leadership in AI chip production, including the milestone of the first NVIDIA Blackwell wafer manufactured in the US and his ongoing collaborations with SpaceX and OpenAI. Huang discusses NVIDIA's evolution into a critical player in AI infrastructure and chip manufacturing, emphasizing the company's role in advancing American tech sovereignty and AI factories.

"This milestone cements both the economic and technological backbone that will turn data into intelligence and secure American leadership for the AI era."

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22. Bloomberg Talks

Episode: Nvidia CEO Jensen Huang Talks Upbeat Outlook, Blackwell Sales
Date: 2025-11-20 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the strong sales and supply chain management of the Blackwell GPU generation, shares details about the upcoming Vera Rubin generation's development progress and launch timeline, and emphasizes NVIDIA's robust partnerships and planning for future growth.

"Sales are off the charts for Blackwell and NVIDIA GPUs in the cloud are sold out. We got plenty of Blackwells to sell you. We have lots of Blackwells coming. We're making a lot of Blackwells, and we have a bunch of Vera Rubins coming. And so business is very, very strong, but we've planned our supply chain incredibly well."

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23. 10PlusBrand

Episode: Jensen Huang's Talk on Video_Part 1 of 3: His Big Bet 30 Years Ago_Season 2, Episode 59
Date: 2025-08-02 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses his longstanding vision for NVIDIA, explaining how he invented both the technology and markets like 3D video gaming and AI acceleration, emphasizing the importance of ecosystems and developer communities in NVIDIA's growth.

"We have to invent the technology, and we have to invent the market."

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24. WELT Vorlesefunktion PROD

Episode: Quartalszahlen. Die magische Nvidia-Nacht - und die Lehren fur die Borse, Deutschland und den Fortschritt
Date: 2025-11-20 | Relevance: 95/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong quarterly earnings, including record revenues and profits, robust demand for its AI chips like the Blackwell series, and CEO Jensen Huang's insights on the rapid scaling of the AI ecosystem and sustained high profit margins despite competitive pressures. Huang highlights exponential growth in computing needs for AI training and inference and the company's leadership in pricing power and supply chain resilience.

> *"Der Bedarf an Rechenleistung steigt rasant und verstarkt sich exponentiell in den Bereichen Training und Inferenz, sagte Jensen Huang, Grunder und CEO von Nvidia."*

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25. Machine Learning Tech Brief By HackerNoon

Episode: The NVIDIA Nemotron Stack For Production Agents
Date: 2026-01-23 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's Nemotron stack designed for production AI agents, highlighting its performance improvements in speech recognition, retrieval, and safety model integration that address common latency and integration issues in AI agents. It praises NVIDIA's cohesive approach that enhances throughput and reliability for real-world voice AI applications.

> *"NVIDIA just dropped something that changes this calculus. A production-ready stack where speech, retrieval, and safety models were actually designed to compose."*

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26. Elon Musk Podcast

Episode: Nvidia is coming for Tesla
Date: 2026-01-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's unveiling of the Alpa Mayo AI model for self-driving cars, highlighting its advanced capabilities, high compute power, and open source approach that could leapfrog competitors like Tesla in autonomous driving. It details NVIDIA's partnerships and technical specs, emphasizing significant advancements in AI for vehicles.

> *"Jensen Wang called this the chat GPT moment for physical AI. The point where machines begin to understand, reason and act in the real world."*

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27. Bloomberg Tech

Episode: Nvidia CEO Jensen Huang Eases China Concerns, Touts AI Growth
Date: 2025-05-29 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the impact of China-related restrictions on NVIDIA's revenue, acknowledging an $8 billion loss due to China-specific chip restrictions while highlighting ongoing supply and shipments of the Blackwell chip. Huang emphasizes the competitive risk if NVIDIA is shut out of China and advocates for the company's continued access to the Chinese market despite regulatory challenges.

> *""If we lose China, if we're not allowed to play in China, we're going to be at risk competitively worldwide. It's not just a revenue. It's that because we're not in China, the Chinese companies are going to start to do it themselves.""*

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28. Investrium

Episode: Nvidia es Intel: Egy varatlan szovetseg, ami atrajzolhatja a chip-piacot
Date: 2025-09-20 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's surprising $5 billion investment in Intel to gain indirect access to x86 CPU technology, bypassing licensing restrictions, and how this partnership could lead to new collaborative products integrating Intel CPUs with NVIDIA's RTX GPUs, significantly impacting data centers and PC solutions.

> *""Az Nvidia regota kacerkodik a CPU piaccal... Ez a befektetes tunik az Nvidia okos huzasanak. Igy kvazi hozzafernek az x86 technologiahoz partnersegen keresztul, anelkul, hogy hivatalos licencuk lenne.""*

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29. Venture Daily

Episode: Nvidia Plans to Invest $100B into OpenAI
Date: 2025-09-23 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's groundbreaking $100 billion investment plan into OpenAI to build AI data centers requiring millions of GPUs, signaling strong demand for Nvidia's chips and systems, which significantly boosted Nvidia's stock price and valuation.

> *"Jensen Wong, Nvidia's CEO, described the project as monumental in size, noting that it will double the number of GPUs the company shipped last year."*

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30. Jensen Huang - Biography Flash

Episode: Jensen Huang: Nvidia's $4T Force | Biography Flash
Date: 2025-09-02 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses NVIDIA's pivotal role in global AI development, highlighting recent deals allowing chip sales in China, expansion of data center ambitions, and his optimistic vision for AI's impact on work culture and global GDP. He also comments on geopolitical dynamics influencing semiconductor supply chains and emphasizes US technology as the global standard.

"We may all become much busier as AI boosts productivity and opens endless opportunities."

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31. Closing Bell

Episode: CNBC Special Report: Nvidia CEO Jensen Huang 2/26/25
Date: 2025-02-27 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang discusses the explosive demand for Blackwell chips, production challenges that caused brief delays, and reassures investors about supply chain improvements and future product launches. The latest chip generation achieved $11 billion in Q4 sales, the fastest product ramp ever, though margins dipped due to production and launch costs.

"They worked through those challenges, and he promised they won't face the same issues with upcoming Blackwell products like the Blackwell Ultra."

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32. Jensen Huang - Biography Flash

Episode: Jensen Huang: Nvidia's AI Visionary | Biography Flash
Date: 2025-09-27 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses NVIDIA's significant strategic moves in AI, including a $100 billion supply partnership with OpenAI and praises Elon Musk's rapid deployment of NVIDIA GPUs. He emphasizes the company's ambition to dominate AI infrastructure and the importance of U.S. immigration policy in fueling NVIDIA's investments and access to global talent.

"Only Musk could pull off such a rapid build-out, setting a new benchmark for the AI compute arms race."

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33. Tech News Briefing

Episode: TNB Tech Minute: Nvidia's Jensen Huang Takes the Stage at 'AI Super Bowl'
Date: 2025-03-18 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast reports on NVIDIA CEO Jensen Huang's unveiling of the Rubin AI chip at the Developers Conference, highlighting its significant advancements and partnerships with General Motors for autonomous driving tech and Yum! Brands for AI-powered order systems. It emphasizes NVIDIA's leadership in AI technology amid a challenging tech stock market environment.

"Chief Executive Jensen Huang took the stage before an audience of 25,000 to unveil Rubin, it's NVIDIA's next-generation artificial intelligence chip named after the astronomer who discovered dark matter. Rubin boasts three times the computing power of NVIDIA's own Blackwell Ultra chip."

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34. AI Convo Cast

Episode: Nvidia's Rubin AI Supercomputer, OpenAI's 2026 Strategy, and Microsoft Copilot Security Push
Date: 2026-01-27 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's launch of the Rubin AI supercomputer platform, highlighting its advanced AI capabilities, major cloud partnerships, and CEO Jensen Huang's statements on its significance for future AI development.

"Jensen Huang, Nvidia's CEO, said during the announcement that Rubin takes a giant leap toward the next frontier of AI."

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35. Lumida Wealth : Non-Consensus Invest Beyond the Ordinary

Episode: Nvidia Breakdown & AI Trends
Date: 2025-05-30 | Relevance: 90/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features a discussion around NVIDIA's strong earnings beat, significant growth in data center revenue, and Jensen Huang's guidance for a trillion dollars in capital expenditure by 2030. It also highlights the rapid ramp-up of the Blackwell GPU and touches on challenges from export controls in China, positioning NVIDIA as a leader in AI infrastructure.

""NVIDIA beat on earnings and revenue, despite the four and a half billion dollar write-off related to the export controls in China... their data center revenue was 39 billion, that's 73% year of year growth. And the Blackwell GPU ramp is the fastest new product ramp in the company history.""

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36. Finding the Signal

Episode: Nebius - The AI Cloud Pure Play
Date: 2025-08-10 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nebius' AI infrastructure strategy, highlighting their vertical integration and a strategic partnership with NVIDIA that grants early access to cutting-edge NVIDIA GPUs, providing a competitive advantage in AI workloads. NVIDIA is portrayed as the undisputed leader in AI chips, crucial for Nebius' performance and competitiveness.

"The fourth pillar, and honestly, perhaps one of the most crucial in today's AI landscape, is the NVIDIA partnership, securing the picks and shovels."

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37. Nvidia Stock News Tracker - Daily

Episode: Nvidia Rides AI Boom Amid Volatility, Competitive Pressures
Date: 2025-11-26 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's current stock performance, market volatility, recent competitive threats from Meta and Google's collaboration, robust demand for Nvidia's Blackwell graphics chips, persistent supply constraints, and strong financial results that exceed expectations, alongside positive analyst sentiment.

""This move triggered concerns about possible erosion of Nvidia's data center dominance, causing the stock to give up roughly 150 billion US currency in market value within hours.""

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38. Nvidia Stock News Tracker - Daily

Episode: Nvidia's Turbulent Stretch: AI Dominance Challenged by Competitors and Cautious Guidance
Date: 2025-09-09 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's recent stock volatility following strong quarterly results but cautious future guidance, highlighting rising competition from Broadcom and Chinese companies, as well as shifting analyst price targets and investor sentiment. These factors present challenges to Nvidia's dominance in AI chips despite continued positive outlook from some major analysts.

"Just last week, Nvidia posted robust fiscal second-quarter results that surpassed both earnings and revenue forecasts, yet offered more cautious guidance for the upcoming quarter."

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39. The AI News Daily Brief

Episode: Nvidia's AI Cloud in Europe, Meta's Talent Challenges, and Amazon's AI Video Ads
Date: 2025-06-12 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's CEO Jensen Huang announcing a major initiative to build the first industrial AI cloud in Germany and expand AI infrastructure across Europe by opening 20 AI factories, significantly boosting Europe's AI capabilities. It highlights Huang's strategic vision for Nvidia's AI expansion in Europe and global perspectives on AI and quantum computing.

"At the VivaTech conference in Paris, Nvidia's CEO Jensen Huang made waves by announcing the company's plans to construct its first artificial intelligence cloud platform for industrial applications right in Germany."

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40. Bloomberg News Now

Episode: Nvidia CEO Downplays AI Bubble Fears, Israel Strikes Gaza, More
Date: 2025-10-29 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Nvidia CEO Jensen Huang addressed concerns about an AI bubble, emphasizing that AI models are now sufficiently advanced for customers to pay for them. He highlighted Nvidia's transition to accelerated computing and projected revenue growth, along with strategic partnerships and investments such as the $1 billion invested in Nokia to lead AI networking technologies.

"We're going through a natural transition from an old computing model based on general purpose computing to accelerated computing. We also know that AI has now become good enough because of reasoning capability, research capabilities, its ability to think. It's now generating tokens and now generating intelligence that's worth paying for."

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41. AI Convo Cast

Episode: Nvidia, TSMC Bring Blackwell to US as Microsoft Boosts Copilot for Windows 11
Date: 2025-10-20 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic partnership with TSMC to produce the Blackwell AI chip wafer in the US, highlighting CEO Jensen Huang's remarks on the significance of onshoring semiconductor production for supply chain resilience and competitive positioning in the AI chip market.

"The single most important chip is now being produced in America, Huang declared at the event, highlighting the significance of this achievement for domestic technology infrastructure."

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42. Beijing Bytes: US-China Tech War Updates

Episode: Beijing Bytes: Murky Pandas Crash the Cloud Party & Nvidia Plays Chip Limbo
Date: 2025-08-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses US export restrictions affecting NVIDIA's AI chips, the company's strategic moves such as launching the H20 chip into China at reduced margins, regulatory pressures from Chinese authorities including security scrutiny involving Jensen Huang, and NVIDIA's halted production of the H20 while working on a next-gen chip. It also covers the broader implications for the supply chain and competitive landscape in China.

"Chinese regulators... even summoning Jensen Huang in July. NVIDIA has no security risks, but now they've halted H20 production entirely and are working overtime on a next-gen Blackwell-based B30A chip."

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43. Brew Markets

Episode: NVIDIA'S CES Unveils & Uniqlo Expands In the U.S.
Date: 2026-01-06 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's CES unveiling of its next-generation Rubin platform, highlighting its AI supercomputer capabilities, efficiency improvements, and cost reductions. Jensen Huang, NVIDIA's CEO, specifically praises the platform's virtues during his appearance at CES, which has garnered admiration from various tech industry leaders.

"quote, the chat GPT moment for physical AI. So proclaimed NVIDIA CEO Jensen Huang of the chip giant's latest moves during CES this week."

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44. TechCrunch Industry News

Episode: Nvidia reports record sales as the AI boom continues, also 911 centers are so understaffed, they're turning to AI to answer calls
Date: 2025-08-28 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's strong financial performance driven by AI data center sales and CEO Jensen Huang's comments on the company's AI platform Blackwell and the future of AI infrastructure spending. It also touches on Nvidia's involvement with OpenAI's GPT-OSS model launch and some challenges in the Chinese market.

"Blackwell is the AI platform the world has been waiting for, said CEO Jensen Huang in a statement accompanying the release."

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45. The Rundown

Episode: Deep Dive: Why Nvidia's Future is in Trump's Hands
Date: 2025-03-01 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast episode provides an in-depth discussion of NVIDIA's recent earnings, highlighting strong revenue and profit growth driven by AI data center sales, but notes a trend of slowing growth and increased competitive and regulatory pressures, including geopolitical concerns with China and US regulators. The discussion centers on NVIDIA's future prospects in AI dominance amidst these challenges.

"NVIDIA's data center revenue, which is their AI business, was up 93% on an annual basis. The data center revenue now makes up 91% of NVIDIA's total revenue."

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46. Squawk Pod

Episode: Nvidia CEO Jensen Huang 10/8/25
Date: 2025-10-08 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang discusses the company's unique position in AI infrastructure, investments in AI startups, and competitive landscape including China. He highlights NVIDIA's chip leadership and strategic investments, expressing optimism about future AI-driven companies.

"Our chips are quite special. We're the only company in the world today that builds all of the chips inside an AI infrastructure."

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47. Washington AI Network with Tammy Haddad

Episode: 60: Inside NVIDIA GTC DC: Jensen Huang on America's AI Moment
Date: 2025-10-29 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang, NVIDIA's CEO, discusses the company's AI strategy, highlighting the partnership with the Department of Energy for building AI supercomputers, the shift towards GPU-based accelerated computing, and the importance of AI in augmenting classical computing and scientific research. He emphasizes America's AI momentum and the critical role NVIDIA plays in advancing AI and computing technologies.

"Today we're announcing that the Department of Energy is partnering with NVIDIA to build seven new AI supercomputers to advance our nation's science."

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48. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang's Pivotal Week - Nvidia Intel Deal, London Tech, and AI Bananas
Date: 2025-09-20 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses Nvidia's strategic $5 billion investment and partnership with Intel to co-develop AI-focused data center and PC products, highlights supply chain shifts incorporating Intel CPUs, and expresses support amid US-China chip trade tensions. He also engages with industry events like London Tech Week and touches on AI innovations such as Google's nano banana image generator.

"The return on that investment is going to be fantastic."

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49. 10PlusBrand

Episode: Will AI Take Away Human Jobs? - Jensen Huang's Talk, Pt 2_Summary by Joanne Z. Tan, Thought Leadership Coach_Season 2, Episode 60
Date: 2025-08-02 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses NVIDIA's AI strategy focusing on first-principle thinking, the dramatic advancement of GPU performance, and NVIDIA's transformation from a chip company to architecting entire data centers. He also touches on the trajectory of AI development and the impact of computational cost reductions on the industry.

"The belief has to come from first-principle computer science or physics or economics. First-principle reasoning added to it was inspiration."

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50. Bloomberg Surveillance

Episode: Bloomberg Tech Special: Nvidia CEO Jensen Huang on Upbeat Forecast
Date: 2025-11-20 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang discusses the company's strong sales of Blackwell GPUs and sold-out status in the cloud, highlighting robust supply chain planning and strong partnerships to meet high demand. He also touches on the upcoming Vera Rubin generation and the large engineering efforts underway.

"We have the largest supply chain in the world. Our partners, TSMC, our memory partners, SK Hynix, Micron, Samsung, are doing a fantastic job supporting us. And all of our systems partners, Foxconn and Quanta and Wishtron, our packaging partners, everybody's doing a fantastic job supporting us."

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51. The AI News Daily Brief

Episode: Nvidia's AI Chip Export Strategy and Global Tech Implications
Date: 2025-07-25 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent export of $1 billion worth of AI chips to China despite U.S. restrictions, highlighting the company's strategic navigation of international trade regulations and its implications on global AI dynamics and competition. It touches on Jensen Huang's vocal stance on AI's transformative potential but does not provide direct quotes.

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52. Belfast News Today | 2 Min News | The Daily News Now!

Episode: CES Unveils AI-Powered Robots, Chips & Gadgets
Date: 2026-01-06 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast covers NVIDIA's major announcements at CES, highlighting CEO Jensen Huang's unveiling of several AI and robotics innovations including physical AI, simulation platforms, and the next-generation Vera Rubin Superchip. It emphasizes NVIDIA's leadership in AI and robotics, contrasting it with competitors and showcasing its strategic advances.

"NVIDIA CEO Jensen Huang stole the spotlight with physical AI, their term for smart models trained in virtual worlds then built into real machines."

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53. Business Wars

Episode: How Nvidia Owned A.I. | Once in a Lifetime | 2
Date: 2025-12-24 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: In a 2007 meeting at Nvidia's headquarters, CEO Jensen Huang passionately defends the company's CUDA platform and GPU strategy against skeptical financial analysts, emphasizing the creation of a new customer base and the superior performance of Nvidia's graphics chips. Huang highlights partnerships, like with Adobe for Photoshop, showcasing the practical impact of GPU computing.

"We're creating an entirely new customer base for our company. Our graphics chips offer 10 to 200 times the performance of general purpose chips. We're about to enter the era of the GPU."

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54. The AI News Daily Brief

Episode: NVIDIA's AI Push, Ethical AI by Anthropic, and AI in Healthcare Code of Conduct
Date: 2025-05-20 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast covers NVIDIA's ambitious vision for AI infrastructure as articulated by CEO Jensen Huang, highlighting AI factories, the Kudax platform, and key partnerships aimed at revolutionizing industries with advanced AI technology.
"AI is becoming the new infrastructure on par with electricity and the internet."

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55. The AI News Daily Brief

Episode: NVIDIA's AI Servers, Pentagon's AI Tests, and Google's Gemini 2.5 Model
Date: 2025-08-26 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's launch of RTX PRO servers based on the RTX PRO 6000 Blackwell GPU, highlighting their impact on enterprise AI re-architecture and adoption across major companies like Disney, Foxconn, and Hyundai. Jensen Huang emphasizes the need for enterprises to transition from classical servers to AI-optimized infrastructure to unlock new possibilities in AI workloads.
"The age of AI has arrived, and enterprises can no longer rely on classical servers alone. They must re-architect for AI."

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56. Nvidia Stock News Tracker - Daily

Episode: NVIDIA's AI Dominance and Volatility: Navigating the Chip Giant's Stock Trajectory
Date: 2025-03-19 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent GTC conference where CEO Jensen Huang revealed the company's chip roadmap and AI technology advances, including partnerships in AI-driven manufacturing. It also mentions recent stock volatility impacted by sector trends and competition from other semiconductor firms.
"During the conference, Huang unveiled the company's roadmap for the next two years, providing updates about its Blackwell and next-generation Rubin chips."

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57. TEO Podcast: Kunstliche Intelligenz, Tech Trends & Aktien

Episode: #586: NVIDIA mit Rekordergebnissen
Date: 2025-02-27 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode provides an in-depth analysis of NVIDIA's recent record-breaking quarterly results, highlighting a 78% year-over-year revenue increase driven primarily by growth in the Data Center segment related to AI chips such as the H100, H200, and Blackwell generation. The discussion covers NVIDIA's market capitalization status, revenue growth compared to peers like Apple, and concerns about chip delivery delays, suggesting strong confidence in NVIDIA's AI-driven business expansion.
"NVIDIA hat im letzten Quartal 39 Milliarden Dollar Umsatz gemacht. Das ist ein Anstieg von 78 Prozent gegenuber dem Vorjahr."

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58. Trends mit Teo: Kunstliche Intelligenz & Social Media

Episode: #586: NVIDIA mit Rekordergebnissen
Date: 2025-02-27 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's outstanding financial performance, highlighting a 78% year-over-year revenue increase driven by strong growth in the Data Center segment with AI chips like the H100, H200, and new Blackwell generation. The host emphasizes NVIDIA's market cap status and solid outlook, while noting the stock price has not yet reacted significantly.
"NVIDIA hat im letzten Quartal 39 Milliarden Dollar Umsatz gemacht. Das ist ein Anstieg von 78 Prozent gegenuber dem Vorjahr."

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59. Geek Forever's Podcast

Episode: ! Nvidia H200 | Geek Daily EP363
Date: 2026-01-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the complexities around NVIDIA's AI chips, including the S200 and H100 models, focusing on geopolitical impacts on NVIDIA's supply to China and the competitive AI landscape involving major Chinese tech firms. It highlights NVIDIA's role in AI development and supply chain challenges related to export restrictions.
" S200 S200 S100 HBM3E "

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60. Trendstark: Aktien, Borse & Megatrends

Episode: #7 Nvidia Quartalszahlen: Ist der Hype vorbei oder jetzt einsteigen?
Date: 2025-02-27 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent quarterly results, highlighting strong revenue and profit growth driven by high demand for new Blackwell AI chips and growth in the data center segment, reflecting Nvidia's robust AI strategy and market leadership.
"Jensen Huang has said that AI is developing at the speed of light and that the new Blackwell generation AI chips had the fastest product

ramp-up in Nvidia's history, indicating huge demand."

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61. Stock Movers

Episode: Instant Reaction: Nvidia Gives Solid Forecast, Despite China Concerns
Date: 2025-05-29 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's strong financial forecast despite challenges in China, highlighting substantial demand driven by AI workloads such as ChatGPT, with a 10x increase in token generation fueling compute needs. Analysts note that while valuation concerns exist, Nvidia is benefiting from robust AI-driven demand which offsets supply chain pressures and cyclical concerns in semiconductors.

"The traditional CPU compute is just not good enough. And that's where I think they are finding that additional demand."

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62. Bloomberg Intelligence

Episode: Instant Reaction: Nvidia Delivers Solid Earnings
Date: 2025-02-26 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides a detailed discussion of Nvidia's strong fourth quarter financial performance, including data center revenue beats, successful ramp-up of Blackwell AI production, and a positive outlook for the first quarter, indicating strong demand and growth prospects.

"Nvidia's saying demand for Blackwell is amazing. Shares climbed as much as 4% after this first quarter revenue forecast topped estimates."

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63. Bloomberg Daybreak: US Edition

Episode: Instant Reaction: Nvidia Delivers Solid Earnings
Date: 2025-02-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides a detailed discussion on NVIDIA's recent financial results, highlighting strong revenue beats in the fourth quarter and robust demand for the Blackwell AI platform. It also touches on NVIDIA's growth trajectory and successful scale production of its AI supercomputers, emphasizing investor reactions and future revenue outlook.

"NVIDIA saying demand for Blackwell is amazing and that it successfully ramped up Blackwell massive production."

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64. Breaking News | Latest Episodes

Episode: CNBC Special Report: Nvidia CEO Jensen Huang 2/26/25
Date: 2025-02-27 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the unprecedented demand for Blackwell chips and reassures investors about overcoming earlier production challenges, though margins have been impacted. The supply chain issues are easing, but margins fell short of analyst estimates, causing initial stock drops.

"CEO Jensen Huang admitted that hiccup cost them a few months, but he was quick to reassure investors they worked through those challenges."

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65. Bloomberg Daybreak: Asia Edition

Episode: Oil in Focus, Jensen Huang at CES, Separating Signal from Noise
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang announced new AI models and tools at CES, including Alpamayo, an autonomous vehicle AI designed to handle unexpected situations. He also introduced the Rubin architecture, the successor to Blackwell, aimed at supporting complex AI workloads with greater performance and energy efficiency, with production starting and ramping up into late 2026.

"Today, we're announcing Alpamayo, the world's first thinking, reasoning autonomous vehicle AI. Alpamayo is trained end to end, literally from camera in to actuation out."

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66. TechCheck

Episode: Nvidia's Chip Diplomacy and Concentration Risk 8/28/25
Date: 2025-08-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's strong financial performance despite export control challenges and highlights CEO Jensen Huang's efforts to lobby for eased chip export restrictions to China, referred to as 'GPU Panda Diplomacy.' The conversation also notes concerns about decelerating data center revenue growth and regulatory impacts on future sales.

"NVIDIA's Jensen Huang is pushing what Wedbush's Matt Bryson calls, 'GPU Panda Diplomacy,' borrowing from China's famous strategy but in reverse, lobbying Washington to let American AI chips flow to China while proving the company doesn't need Beijing to survive."

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67. Wall Street Breakfast

Episode: Nvidia unveils its next-gen AI tech
Date: 2025-05-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia CEO Jensen Huang's announcements at Computex 2025, highlighting new AI technology launches including next-generation GB300 systems, the RTX Pro server, and NVLink Fusion, as well as partnerships such as building an AI supercomputer factory in Taiwan.

"Nvidia CEO Jensen Huang announced a new wave of new technologies and partnerships at the Computex 2025 conference in Taiwan, looking to reinforce the company's dominance in the AI computing space."

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68. Slate Technology

Episode: What Next TBD | Trump Dips into NVIDIA's Chips
Date: 2025-08-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's role in navigating U.S.-China export restrictions for NVIDIA's AI chips, highlighting his diplomatic dealings including a deal with the Trump administration involving U.S. government royalties from Chinese sales. It emphasizes Huang's strategic importance amid global chip supply chain issues and geopolitical tensions.

"So I said, listen, I want 20 percent if I'm going to approve this for you, for the country, for our country, for the U.S. I don't want it myself. And then Jensen wasn't really in a position to say no. And he said, would you make it 15? So we negotiated a little deal."

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69. Linea mercati

Episode: Caffe Affari (ristretto) | Nvidia batte ancora le attese, Huang e Musk fanno affari in Arabia Saudita e le altre storie
Date: 2025-11-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong financial performance, including record revenues and profits driven by increased AI spending, with CEO Jensen Huang addressing concerns about an AI bubble and expressing optimism. Additionally, there is mention of U.S. political support opposing sales restrictions to China, which could impact NVIDIA's supply chain and market access.

"Il CEO Jensen Wang durante la call ha provato anche a rassicurare, si e parlato molto di una bolla AI ma noi vediamo qualcosa di molto diverso."

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70. Motley Fool Money

Episode: Nvidia's New Chips, with a Side of Valuation
Date: 2025-03-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's upcoming generation of GPUs called Vera Rubin, highlighting improvements such as doubling the CPU performance with new grace chips, enhanced NVLink scaling for GPU communication, and advanced HBM4 memory leading to nearly ten times the aggregate compute power over the previous Blackwell platform. The conversation frames NVIDIA's technological advancements as a significant leap in GPU architecture.

"Vera Rubin just represents a really big leap, delivering almost 10 times the aggregate compute power of the Blackwell platform."

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71. Markets & Money Today | 2 Min News | The Daily News Now!

Episode: Nvidia's AI Boom Boosts HPE's Data Center Stock
Date: 2025-11-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong quarterly performance driven by AI data center demand, emphasizing CEO Jensen Huang's remarks against the idea of an AI bubble and highlighting NVIDIA's key partnerships with AI companies like OpenAI and Anthropic. It also links NVIDIA's success to growth prospects for server manufacturers such as HPE and Dell.

"During their earnings call, NVIDIA CEO Jensen Huang addressed concerns about an AI bubble, emphasizing the company's expanding role in AI data center infrastructure."

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72. Simply Tech

Episode: Nvidia's AI Supercomputer for Desktops, Alphabet's $32 Billion Cybersecurity Acquisition, and Microsoft's AI Paywall
Date: 2025-03-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's unveiling of the DGX Station, a personal AI supercomputer that brings data center-level AI capabilities to desktop users. The conversation highlights the advanced technology behind the DGX Station, including its integrated Grace Blackwell Ultra chip and performance enhancements.

"The DGX Station represents a major leap forward in AI computing power for individual users, combining a high-performance NVIDIA Grace CPU with a Blackwell Ultra GPU and 784 GB of coherent memory space."

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73. FinanceFrontierAI: Top 1% Storytelling: Strategies, AI, Finance, Business, Money, Wealth, Mindset

Episode: The AI Infrastructure Arms Race: Power, Capital, and the New Compute Order
Date: 2025-09-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in the AI accelerator market, focusing on their H100 and B200 series GPUs as the standard for large model training. It highlights the strategic importance of compute chips, the concentration of manufacturing in Taiwan, and the geopolitical risks involved, as well as U.S. investments in domestic chip fabs.

"NVIDIA holds more than 80% of the AI accelerator market. Its H100 and B200 series are the gold standard for training large models."

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74. AI News Daily

Episode: Leaders Embrace AI for Support, Nvidia Boosts AI Startups Investments, Indian Firms Appoint AI Officers, OpenAI Enhances Safety Measures, and more...
Date: 2025-06-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's significant increase in investments in AI startups, highlighting its financial success post-ChatGPT launch, expansion of funding rounds, and diverse investment strategy across AI sectors such as autonomous driving, data management, and healthcare.

""NVIDIA is making headlines with a significant increase in its investments in AI startups, a move that underscores its financial success since the launch of ChatGPT over two years ago.""

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75. AI Fire Daily

Episode: #161 Neil: 7 AI Prompts That Give You A Serious Edge In Stock Analysis
Date: 2025-09-29 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent stock performance surge driven by the launch of the Blackwell Ultra GPU at GTC 2025, highlighting a 30% performance improvement for AI training tasks and positive analyst upgrades from HSBC and Goldman Sachs.

"Public tests highlighted that Blackwell Ultra was 30% faster for key AI training tasks than the older model."

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76. Nvidia Stock News Tracker - Daily

Episode: Nvidia Dominates AI Chip Demand, Secures Supply Deals Amid Bullish Analyst Outlook
Date: 2025-08-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's dominant position in AI chip demand, its strategic supply chain agreements with TSMC for next-generation Blackwell chips, and bullish analyst outlooks forecasting significant revenue growth in its AI segments. It highlights new software tools and cloud partnerships enhancing Nvidia's AI infrastructure expansion.

"Nvidia secured new agreements with Taiwan Semiconductor Manufacturing Company to ensure timely delivery of its next-generation Blackwell chips through 2026, a critical edge as competitors struggle with yield challenges."

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77. AI News Tracker

Episode: Shaping the AI Landscape: Navigating Landmark Deals, Shifting Dynamics, and Surging Investment
Date: 2025-10-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic $5 billion investment in Intel and a co-development agreement for PC and data center chips, positioning Intel as a manufacturing partner. It also highlights NVIDIA's landmark deal with OpenAI, involving up to $100 billion in computing resources deployment, and notes the competitive dynamics with AMD rising as a significant competitor.

"NVIDIA's announcement of a $5 billion investment for a 4% stake in Intel, coupled with a new agreement for Intel and NVIDIA to co-develop PC and data center chips."

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78. AI News Tracker

Episode: Shaping the AI Landscape: Navigating Landmark Deals, Shifting Dynamics, and Surging Investment
Date: 2025-10-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's significant strategic moves including a $5 billion investment to acquire a 4% stake in Intel and a co-development agreement for PC and data center chips, highlighting NVIDIA's efforts to secure US-based manufacturing alternatives and its pivotal role in AI infrastructure through partnerships such as the landmark deal with OpenAI involving up to 10 GW of computing resources.

""NVIDIA's announcement of a $5 billion investment for a 4% stake in Intel, coupled with a new agreement for Intel and NVIDIA to co-develop PC and data center chips.""

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79. The MAD Podcast with Matt Turck

Episode: Dylan Patel: NVIDIA's New Moat & Why China is "Semiconductor Pilled"
Date: 2026-02-05 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode provides an in-depth discussion of NVIDIA's evolving AI strategy, including its acquisition of Grok and the uncertainty about the future architecture of AI models. It also touches upon NVIDIA's hardware adaptations to support different AI model structures, highlighting the company's strategic moves in a changing AI landscape.

"'Another direction AI models could head, right? We don't know. Are models going to think in one token stream? Or is it actually they're constantly context switching... And so Google and OpenAI have both released mechanisms of this with their pro models...'"

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80. Tech News Daily

Episode: Microsoft Fixes Critical Entra ID Flaw, Seattle Tech Layoffs Expand, Nvidia's AI Growth Slows, Google Must Share Search Data, and more...
Date: 2025-09-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The discussion covers NVIDIA's AI accelerators' significant role in company revenue by 2028, noting a slowing growth rate since 2024 alongside increasing competition from firms like Broadcom and AMD. It also highlights long-term risks such as the semiconductor industry's cyclicality, rising energy demands, geopolitical pressures, and regulatory scrutiny affecting NVIDIA's market dominance.

"NVIDIA's AI accelerators, including graphics processors and machine learning systems, are projected to account for nearly half of the company's revenue by 2028, but recent data indicates this growth rate has slowed since 2024."

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81. @HPCpodcast with Shahin Khan and Doug Black

Episode: HPC News Bytes - 20250915
Date: 2025-09-15 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's announcement of the Rubin CPX AI Accelerator, highlighting its advanced capabilities in AI inference, superior performance over previous models, and its competitive implications in the data center market against AMD and major cloud providers.

"CPX is quite a bombshell of news. It goes to the heart of the emerging AI inference market and is a giant competitive move."

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82. Nvidia Stock News Tracker - Daily

Episode: Nvidia's Dominance in AI and Semiconductors Sparks Investor Frenzy
Date: 2025-07-11 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record-breaking market capitalization driven by its AI and semiconductor dominance, highlighting its robust financial performance, surge in stock price, and strategic role in government AI initiatives. The episode underscores investor enthusiasm fueled by the company's advanced GPU models vital for AI data centers.

"Nvidia recently became the first in history to cross a US$4 trillion market capitalization, a milestone that highlights its dominance in artificial intelligence infrastructure and the broader semiconductor sector."

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83. AI News Daily

Episode: Nvidia Unveils Nemotron 3, Slop Named 2025 Word, Tesla Rolls Out Robotaxi Duel, Gemini AI Transforms Real Time Translation, and more...
Date: 2025-12-16 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's launch of Nemotron 3, an open model strategy involving various AI tools and stacks, as well as shipment challenges of the H200 GPU in China due to regulatory issues. It highlights NVIDIA's strategy to couple silicon leadership with an open software stack amidst strong AI demand and a competitive landscape including China's open-source AI initiatives.

"NVIDIA is expanding its open model strategy with Nemotron 3, launching a family in nano, super, and ultra sizes to help enterprises scale multi-agent AI with more transparency and efficiency."

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84. Beijing Bytes: US-China Tech War Updates

Episode: Nvidia's $15B Blunder, Hacked by Claude, and the US-China Tech Tango!
Date: 2025-11-24 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses the impact of US-China trade tensions on NVIDIA, highlighting Jensen Huang's forecast of near-zero sales in China leading to a $15 billion loss, along with regulatory uncertainties affecting chip exports and competitive pressures from Chinese chipmakers. It also covers strategic shifts in the semiconductor and AI hardware landscape amid geopolitical constraints.

"NVIDIA's CEO Jensen Huang now forecasts near-zero sales in China, a $15 billion hit."

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85. Bloomberg Daybreak: US Edition

Episode: Trump's Trade War Upended by Courts; Nvidia Rallies on Upbeat Forecast
Date: 2025-05-29 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's recent financial performance, including a 69% sales increase to $44.1 billion and a forecast of $45 billion revenue for the next quarter despite $8 billion lost due to Chinese export restrictions. CEO Jensen Huang warns about rising competition from Chinese AI rivals like Huawei, emphasizing the need for NVIDIA's offerings to remain competitive in the face of U.S. export bans that effectively lock the company out of the Chinese market.
"Without American technology, the availability of Chinese technology will fail the market. And so, you know, whatever we offer has to at least at least be competitive and has to add value to the market."

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86. The AI Policy Podcast

Episode: What Selling Nvidia's Blackwell Chips to China Would Mean for the AI Race
Date: 2025-11-05 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the debate over U.S. export restrictions on NVIDIA's advanced Blackwell chips to China, highlighting political opposition that influenced diplomatic talks and the implications for the AI race between the U.S. and China. It also notes NVIDIA's ongoing efforts to push for approval of these exports.
"According to this report, Marco Rubio, the Secretary of State, pushed back on Jensen Huang and others regarding the idea of selling the more advanced Blackwell chips to China."

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87. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: Why OpenAI's CFO Just Sparked an AI Bailout Debate
Date: 2025-11-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Jensen Huang's comments on NVIDIA's AI strategy, particularly his views on the AI race between the US and China, regulatory challenges, and the impact of Chinese subsidies on chip competitiveness. It highlights Huang's concerns about US regulatory burdens and China's state support potentially undermining NVIDIA's energy efficiency advantage, framed in the context of geopolitical competition and supply chain restrictions.
"China is going to win the AI race. The West is being held back by cynicism, and we need more optimism. The US is limited by regulatory burden, with companies facing 50 new state-based regulations, while China offers energy subsidies making power effectively free."

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88. Tech News Daily

Episode: NVIDIA Builds US AI Chips, Meta Launches AI Training in Europe, OpenAI Launches GPT-4.1 Models, Man Faces Terrorism Charges, and more...
Date: 2025-04-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic initiative to build AI chips in the US with significant manufacturing space and partnerships, including remarks by CEO Jensen Huang emphasizing supply chain resilience and job creation. It also covers challenges like tariffs, skilled labor shortages, investor uncertainty, and competition from rivals developing alternative AI models.
"CEO Jensen Huang stated that this effort will bolster the supply chain, enhance resiliency, and meet the increasing demand for AI chips and supercomputers, while also supporting hundreds of thousands of jobs."

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89. AI News Daily

Episode: Nvidia Reaches $47T Market Cap, Cisco Launches New AI Router, Intel Launches New Core Ultra, Nvidia Export to UAE, and more...
Date: 2025-10-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's recent market cap milestone, U.S. export approval of AI chips to the UAE, strategic partnerships, supply chain collaborations, growth opportunities in AI infrastructure and emerging tech sectors, as well as challenges like chip shortages and regulatory scrutiny.
"Nvidia is positioned as a pick-and-shovel play in AI, benefiting from the overall expansion of AI infrastructure regardless of which companies succeed in AI product development."

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90. GoodNightCoffee

Episode: ():,OpenAI,
Date: 2025-11-09 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's recent request to TSMC for increased chip supply to meet demand for NVIDIA's Blackwell AI chips, highlighting strong business growth and the collaborative relationship with TSMC and memory suppliers. It also references NVIDIA's expanding AI hardware ecosystem and supply chain dynamics.
"Without TSMC there would be no NVIDIA today."

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91. AI,99%

Episode: Nvidia_s_$20B_Gambit
Date: 2025-12-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's $20 billion acquisition of AI inference startup GroK, highlighting CEO Jensen Huang's strategy to secure Nvidia's dominance in AI by eliminating competition and focusing on inference capabilities. It also mentions Nvidia's strong cash position used to outpace rivals like Meta, Google, and Microsoft in the AI chip market.
"A leaked internal memo from Huang said it all, this is about future-proofing dominance."

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92. AI Briefing Room

Episode: EP-354 Nvidia's Ai Surge , Google's Generative Ai Battle , and Cybersecurity Threats from Salt Typhoon
Date: 2025-08-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong financial performance driven by AI-focused data center revenue and highlights CEO Jensen Huang's emphasis on the Blackwell chip's significant sales. It also notes NVIDIA's growth prospects in AI infrastructure spending and geopolitical challenges affecting sales in China.
"CEO Jensen Huang emphasized the pivotal role of their most advanced chip, Blackwell, which accounted for $27 billion in sales."

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93. Utbytte

Episode: DNB Teknologi og AI med Marius Wennersten
Date: 2025-10-15 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the significant investments in AI infrastructure involving NVIDIA, AMD, and Broadcom, highlighting NVIDIA's projected $200 billion revenue and its role in the AI chip ecosystem. It covers the broader supply chain and the anticipated economic impact of these technologies.
"'Polaster Childen for store drmmer er jo Sam Holtman og OpenAI, hvor de har inngatt enorme dealer, spesielt na i det siste med AMD, Nvidia og Broadcom.'"

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94. The a16z Show

Episode: Dylan Patel: GPT-5, NVIDIA, Intel, Meta, Apple
Date: 2025-08-18 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The discussion centers around NVIDIA's strong competitive advantages in AI hardware, including superior networking, memory (HBM), manufacturing process nodes, supply chain negotiations, and cost efficiency, positioning it ahead of peers in the AI infrastructure and chip sector.
"NVIDIA is going to have better networking than you. They're going to have better HBM, they're going to have a better process node. They're going to come to market faster. They're going to be able to ramp faster. They're going to have better negotiations with whether it's TSMC or SK Hynix and the memory and silicon side or all the rack people or like copper cables, everything. They're going to have better cost efficiency."

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95. @HPCpodcast with Shahin Khan and Doug Black

Episode: HPC News Bytes - 20260112
Date: 2026-01-12 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's accelerated chip roadmap revealed at CES, highlighting Jensen Huang's announcement of the next-generation Vera Rubin AI chips, which promise significantly increased AI compute performance and are already in full production.
""Scheduled for shipment the second half of this year, Vera Rubin promises blowout performance, delivering 5x the AI compute of the current Grace Blackwell flagship chip.""

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96. TechCheck

Episode: China risks loom over Nvidia print 8/26/25
Date: 2025-08-26 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's supply chain challenges related to China's export ban and the potential impact on revenue, highlighting uncertainties about China's return to the market and recent reports of slowing H20 chip production amid Chinese pushback.
"The company only said it, quote, constantly manages supply chains to address market conditions."

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97. DSR's Siliconsciousness

Episode: Jensen Huang: The Power of Intelligence Infrastructure
Date: 2025-05-02 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses NVIDIA's AI strategy, innovation in chip design, and the impact of AI on energy and climate systems. The conversation highlights NVIDIA's leadership and Huang's insights on AI's potential benefits and challenges.

"NVIDIA engineers the most advanced chip systems and software for the AI factories of the future."

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98. Jensen Huang - Biography Flash

Episode: Jensen Huang Biography Flash: Nvidia CEO Maps AI Future at GTC 2025 While Meeting Trump on Chip Wars
Date: 2025-12-20 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast highlights Jensen Huang's significant role in advancing NVIDIA's leadership in AI, detailing his keynote plans for GTC 2025, discussions on US AI leadership and chip dominance, and his strategic political engagements. It underscores Huang's evolving role from chip industry leader to national security advocate, positioning NVIDIA at the forefront of the AI industrial revolution.
""He [Jensen Huang] met President Trump and Republican senators amid the AI chips fury with China, a savvy bipartisan play amid export curds.""

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99. Today in Focus

Episode: The secrets of the world's richest company
Date: 2025-08-13 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's status as the richest company in the world, its critical role in the AI industry, and highlights Jensen Huang's unusual offer to pay the US government 15% of revenues from AI chip sales to China amidst trade tensions. It touches on NVIDIA's competitive positioning and geopolitical risks impacting its strategy.
"This week, Jensen Huang took the surprising step of offering to pay the U.S. 15% of the money that NVIDIA makes by selling AI chips to China, a deal like nothing else in modern trade history."

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100. The a16z Show

Episode: Jensen Huang and Arthur Mensch on Winning the Global AI Race
Date: 2025-03-21 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses NVIDIA's pivotal role in the global AI race, highlighting the importance of sovereignty in AI infrastructure and the company's strategic bets like GPUs that underpin the digital world. The conversation covers the broader context of AI infrastructure, including chips, models, and policy that are critical for AI dominance among countries.
"Jensen Huang, co-founder and longtime CEO of NVIDIA, has led the company to be one of the largest companies at over $3 trillion in market cap, with products like the GPU that are the backbone to so much of our digital world today."

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101. Daybreak

Episode: Why Nvidia's $4 trillion machine should bet big on India
Date: 2025-07-10 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's transformative role in AI and robotics, highlighting Jensen Huang's vision of physical AI as a major industry and emphasizing NVIDIA's $4 trillion valuation and its position as a leading AI infrastructure provider. It also underlines the growing importance of India in NVIDIA's global AI strategy, particularly in scaling applications and developer ecosystems.
""These machines will soon move amongst us through the world and not just model it. And NVIDIA is building the nervous system for that new world.""

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102. Bloomberg Talks

Episode: Nvidia and Nokia CEOs Talk New Partnership and Future of AI
Date: 2025-10-28 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses Nvidia's strategic $1 billion equity investment in Nokia as part of a new partnership to enter telecommunications markets leveraging AI and accelerated computing technologies, emphasizing national security and American technology leadership.
""We announced a brand new platform for a new market we've never been in. If we take advantage of this transition from general purpose computing to accelerated computing, from old types of software to AI, we can take advantage of this transition of AI and 6G for America to win back telecommunications again.""

103.

Episode: 2026AI
Date: 2025-12-28 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's leading position in AI technology, highlighting that major AI models unanimously predict NVIDIA as the top tech stock in 2026 due to its dominance not just in AI chips but also in controlling the AI application ecosystem. It emphasizes NVIDIA's evolution from a hardware vendor to a comprehensive AI infrastructure provider, influencing both AI development and inference markets.
"AI"

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104. Nvidia Stock News Tracker - Daily

Episode: NVIDIA's AI Dominance and Investor Outlook: Navigating Market Fluctuations
Date: 2025-06-06 | Relevance: 90/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's stock performance, recent comments by CEO Jensen Huang that are favorable for investors, and analyst opinions on NVIDIA's AI dominance and potential supply chain risks due to tariffs. It highlights NVIDIA's strength in AI and gaming sectors despite market volatility.

"On June 5, 2025, NVIDIA's CEO Jensen Huang provided fantastic news for investors, which could potentially boost the stock."

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105. Inside Taiwan

Episode: Why Is the AI Race in 2026 Shifting from Model Breakthroughs to Cost per Token and Power per Rack?
Date: 2026-01-08 | Relevance: 88/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's AI strategy including CEO Jensen Huang's announcement of the new Ruben chip platform and their robotics stack aiming to become a universal OS for robots. It also highlights Huang's optimistic forecast about reducing AI training costs and NVIDIA's competitive stance against AMD in data center AI hardware.

"CEO Jensen Huang didn't just give a keynote. He set the tone for the entire industry. He unveiled Ruben, the successor to their wildly successful Blackwell chip platform, signaling that NVIDIA has no intention of slowing its relentless pace of innovation."

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106. Innovation by default

Episode: #127 - La fe del jugador y y el codigo que conquisto el mundo
Date: 2025-05-24 | Relevance: 88/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode provides an in-depth narrative on Jensen Huang's journey and NVIDIA's evolution from a gaming graphics card company to a central player in AI and other advanced technologies. It covers his background, strategic vision, and NVIDIA's role in AI infrastructure, cloud computing, and other cutting-edge fields.

"Jensen Juan... combines technical talent, an almost inhuman resistance to failure, and strategic vision that enabled him to see, before anyone else, that artificial intelligence wouldn't be built with new ideas, but with new processors."

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107. Big Take

Episode: Nvidia Silences AI Skeptics (For Now)
Date: 2025-11-20 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent strong earnings report and CEO Jensen Huang's confident commentary on the company's AI strategy and market leadership, particularly highlighting NVIDIA's key role in powering AI workloads with its GPUs like the Blackwell model. It addresses concerns about an AI valuation bubble and details Wall Street's positive reaction to the earnings beat.

"That's NVIDIA CEO Jensen Huang on a call with Wall Street analysts after the company reported earnings that roundly beat Wall Street's expectations."

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108. Opening Bid Unfiltered

Episode: Should you go all in on Nvidia stock?: NVIDIA EARNINGS SPECIAL
Date: 2025-02-27 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's earnings call with a focus on strong demand for NVIDIA's AI platform and future gross margin improvements due to the Blackwell system ramp-up. Analysts also address concerns about tariffs, export controls, and competition from custom ASICs by major cloud providers.

"We're going to have to continue to scale as demand is quite high and customers are anxious and impatient to get their Blackwell systems."

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109. Investing Experts

Episode: Nvidia and the Super Bowl of AI
Date: 2025-03-18 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses Nvidia's position and outlook ahead of its annual GTC event, highlighting both bullish and bearish analyst perspectives on the company's AI-driven growth, performance, and competitive risks. It also outlines Nvidia's core business and recent market sentiments, emphasizing the impact of the Blackwell GPU and AI strategy.

""Nvidia's Q4 performance has helped reshape investor sentiment, and today's GTC event has been anticipated as a significant short-term catalyst, likely to drive the stock near or beyond its 52-week highs of 150.""

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110. Geek Forever's Podcast

Episode: ? AMD NVIDIA | Geek Story EP480
Date: 2025-09-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: This podcast episode discusses NVIDIA's dominant position in the AI data center market, highlighting its significant market share, high-value GPU products, and strategic software platform Cuda which underpins its AI leadership. It also addresses concerns about NVIDIA's near-monopoly and its implications for major customers relying on its technology.

"Nvidia 80% 95% "

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111. FOX on Tech

Episode: Nvidia GTC Addresses AI Developments
Date: 2025-10-31 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast covers Jensen Huang's keynote discussing Nvidia's AI initiatives, including partnerships with Nokia and the U.S. Department of Energy for AI supercomputers, advancements in 6G technology, and autonomous vehicle projects with Uber.

"Jensen Huang - used his keynote to talk about the state of the industry, scientific discovery, AI factories and more."

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112. HyperChange

Episode: How Tesla Will Disrupt Nvidia
Date: 2026-01-05 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's dominant position in the AI chip market, highlighting its monopolistic status and high profit margins, while also suggesting potential disruption threats from Tesla. The analysis includes financial figures indicating Nvidia's significant revenue and profit, implying a strong competitive moat but raising the possibility of emerging competition.

"Nvidia is, I would say, arguably in a monopoly right now selling chips for AI training. This boom in AI training... Every Anthropic, Microsoft, Google are all buying chips from Nvidia essentially to run their AI systems."

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113. Tech Update | BNR

Episode: Intel krijgt 5 miljard dollar van Nvidia om samen chips te ontwikkelen
Date: 2025-09-18 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's $5 billion investment in Intel to jointly develop new chips, specifically a System on a Chip (SOC) combining Intel processors and Nvidia graphics, highlighting a strategic shift in their collaboration beyond typical foundry relationships.

"Intel is a foundry company, like TSMC, and normally bakes the chips designed by Nvidia, but now they're explicitly choosing to design and make chips together, including a SOC that combines Intel's processor and Nvidia's graphics chip."

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114. ChinaTalk

Episode: NVIDIA GPU Black Market Smuggling
Date: 2025-08-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses the alleged GPU smuggling black market involving NVIDIA products into China, featuring insights from Steve Burke of GamerNexus tracing the smuggling supply chain and addressing NVIDIA's denial of smuggling activities. It touches on the impact of tariffs on the supply chain and how certain banned NVIDIA GPUs are still available in the market despite trade restrictions.

"NVIDIA kind of, they almost were baiting, I feel like, a response with the whole like, no, smuggling doesn't happen, and it's a non-starter."

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115. Machine Learning Street Talk

Episode: Nvidia Returns to China's AI Market
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of shipping AI chips to China after regulatory restrictions, the impact on Nvidia's revenue, and highlights the specifics of their AI model offerings such as Numatron 70b.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

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116. Geek Forever's Podcast

Episode: Nvidia OpenAI | Geek Daily EP333
Date: 2025-09-23 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses Nvidia's strategic investments, especially a significant $1 billion investment in OpenAI, highlighting Nvidia's evolution from a gaming hardware company to a central player in AI through its GPUs and ecosystem like CUDA. It also covers Nvidia's competitive edge, the importance of its leadership under CEO Jensen Huang, and its role in powering large AI models.

"Nvidia is not just selling hardware anymore, but has built an ecosystem called CUDA that enables developers to fully utilize Nvidia's

chips, making it the most valuable company in the world."

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117. @HPCpodcast with Shahin Khan and Doug Black

Episode: @HPCpodcast-101: Live from Nvidia GTC25
Date: 2025-03-21 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's significant role in advancing AI technologies, emphasizing CEO Jensen Huang's roadmap from generative AI to physical AI and highlighting the projected $1 trillion AI infrastructure investment by 2028, underscoring Nvidia's leadership and strategic vision in the AI industry.
""They recognize this moment in time that AI is a once-in-a-lifetime kind of a technology shift and they're in a position to drive it.""

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118. In Machines We Trust AI

Episode: Back in Business: Nvidia and China
Date: 2025-07-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of chip shipments to China after regulatory hurdles, the significant revenue impact of this move, and touches on Nvidia's AI model offerings. It provides context on recent developments impacting Nvidia's supply chain and business strategy regarding China.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, and this restart is going to add billions of dollars to Nvidia's overall revenue."

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119. Let Freedom: Political News, Un-Biased, Lex Fridman, Joe Rogan, CNN, Fox News

Episode: Nvidia Returns to China's AI Market
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of AI chip shipments to China after regulatory hurdles, exploring the impact on Nvidia's revenue and market position. It provides background on U.S. regulatory restrictions and the recent developments enabling Nvidia to return to the Chinese AI market.
"Nvidia made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China."

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120. Bloomberg Talks

Episode: Instant Reaction: Nvidia Delivers Solid Earnings
Date: 2025-02-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's strong financial performance, highlighting beats in fourth-quarter revenue and data center revenue driven by demand for Blackwell AI products, with optimistic outlook for the first quarter. It mentions Nvidia's successful scale-up of Blackwell production and positive investor response post-earnings.
"Nvidia saying demand for Blackwell is amazing."

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121. Bloomberg Tech

Episode: Instant Reaction: Nvidia Delivers Solid Earnings
Date: 2025-02-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's strong Q4 financial results with revenues exceeding estimates, highlighting the success and scaling of their Blackwell AI production, and positive outlook for Q1 revenue. The discussion emphasizes Nvidia's robust data center revenue and impressive market demand for Blackwell AI supercomputers.
"Nvidia saying demand for Blackwell is amazing."

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122. Invisible Machines podcast by UX Magazine

Episode: NVIDIA: What's next for the $4T AI powerhouse?
Date: 2025-07-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode delves into how NVIDIA achieved its extraordinary market valuation, focusing on Jensen Huang's leadership and the company's pivotal role in advancing GPUs for AI and large language models. It also discusses NVIDIA's innovative culture, Huang's management style, and the historical context of neural networks and AI development that influenced NVIDIA's strategy.
"How the hell did NVIDIA reach a market valuation of $4 trillion? On this episode of Invisible Machines, we're going to find out with some help from Stephen Witt, author of The Thinking Machine, Jensen Huang, NVIDIA, and the world's most coveted microchip."

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123. Tech Update | BNR

Episode: Trump moet handelsrestricties met China versoepelen, vindt Nvidia-baas
Date: 2025-05-21 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: Jensen Huang, CEO of Nvidia, urges the Trump administration to ease US trade restrictions on China, warning that continued restrictions could cost Nvidia $50 billion in revenue next year and reduce the importance of Nvidia's AI chips due to the large Chinese AI developer base potentially shifting to other suppliers.

"'If we don't ease restrictions, Nvidia could lose $50 billion in revenue next year alone, and the AI chips could become less relevant as half of the world's AI developers in China might build on other systems.'"

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124. Reply AI

Episode: Nvidia Returns to China's AI Market
Date: 2025-10-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's renewal of shipments of AI chips to China after regulatory pauses and the significant revenue impact expected from this move. It includes context on past restrictions and the changes enabling this development, highlighting Nvidia's AI chip sales and market strategy.

""Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to Nvidia's overall revenue.""

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125. Data Skeptic AI

Episode: AI Chips Flow Again: Nvidia in China
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's resumption of chip shipments to China following U.S. regulatory changes, highlighting the significant revenue impact and the background story behind this development.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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126. EL CEO

Episode: Jensen Huang destrona a Tim Cook como puente entre EU y China
Date: 2025-08-11 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's rise as a key political and economic figure surpassing Tim Cook's influence between the US and China. It highlights NVIDIA's ascendancy in market value due to AI and Huang's role in navigating US-China trade tensions, including securing permission to sell chips in China despite restrictions.

"The recent authorization to resume sales of some chips in China, after tough restrictions, is seen as a personal victory for Huang and a reflection of his recent political weight."

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127. The John Batchelor Show

Episode: S8 Ep181: Nvidia's Jensen Huang and the AI Revolution: Colleague Brandon Weichert praises Nvidia's Jensen Huang as a pivotal geopolitical figure driving the AI revolution, comparing AI's growth to the railroad boom and predicting long-term economic benefits and mas
Date: 2025-12-13 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's pivotal role in leading NVIDIA's rise as a dominant force in AI technology, highlighting his influence not only in tech innovation via the GPU but also as a significant geopolitical figure. It touches on NVIDIA's strategic position in the AI revolution and Huang's impact on economic and geopolitical dynamics, including US-China relations.

"He is probably the most important tycoon in America today. I think he probably even surpasses Elon Musk in terms of his pull now at the geo economic, geopolitical or geotechnology."

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128. The Bret Baier Podcast

Episode: One-on-One: NVIDIA CEO Jensen Huang
Date: 2025-07-24 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang, NVIDIA's CEO, discusses the transformative impact of AI and NVIDIA's role in reinventing computing. He emphasizes the accelerating AI innovation in America, the potential productivity gains, and the widespread adoption of AI technologies like ChatGPT.

"We are reinventing computing for the first time in 60 years. This is a very big deal. The computer hasn't been reinvented in 60 years."

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129. Indicast - All Podcasts

Episode: Stephen Witt on the cult of Nvidia and its charismatic founder, Jensen Huang
Date: 2025-06-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Journalist Stephen Witt discusses his unique and open access to Jensen Huang, highlighting Huang's candid and unscripted communication style, his engineering mindset and first principles thinking, as well as insights into NVIDIA's culture and Jensen's leadership.
""Jensen is not that way. He's totally open. You do not know where the direction of the conversation is going to go.""

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130. Schwab Network

Episode: NVDA Shoulders Weight of A.I. Trade at GTC 2025, Jensen Huang Speech
Date: 2025-03-18 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast provides a commentary on Jensen Huang's keynote at GTC 2025, highlighting NVIDIA's AI chip developments such as the Blackwell generation and the upcoming Rubin chip platform, while also addressing competitive pressures like cheaper models from DeepSeek and concerns about market momentum. There is cautious optimism about demand and NVIDIA's hardware improvements but acknowledgment of challenges in the AI growth story.
"He said it was insane demand. Like he likes that verbiage. So I think this is only a good thing."

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131. AI for Career Success

Episode: NVidia CEO Jensen Huang Interview (Dec. 3)
Date: 2025-12-23 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's AI platform, focusing on CEO Jensen Huang's breakdown of the company's five-layer AI stack, the critical role of their CUDA architecture, and challenges related to energy capacity and geopolitical constraints affecting U.S. chip production and AI infrastructure.
"They invent the architecture, something called CUDA, for instance. And CUDA is so critical here. It's a parallel computing architecture."

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132. AI News Daily

Episode: Jensen Huang Shapes Tech Future, Netflix Introduces AI VFX, OpenAI Launches Agent Mode, Nvidia Plans New Superchip Amid Losses, and more...
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's significant impact on NVIDIA, highlighting his leadership in AI, the company's milestone market valuation, and his influence on AI technology and supply chain issues, including export restrictions. It also provides background on Huang and NVIDIA's evolution as a dominant player in gaming, data centers, cloud computing, and AI.
"His leadership has driven Nvidia's market valuation beyond $4 trillion, making it the first company to reach that milestone."

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133. The John Batchelor Show

Episode: Preview: Colleague Chris Riegel describes what NVIDIA boss Jensen Huang unveiled in his annual presentation -- an upside breaking of Moore's Law re how fast computing can speed up every 18 months. More later.
Date: 2025-03-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's recent NVIDIA presentation highlighting significant advancements in chip technology that break Moore's Law, signaling major progress in AI computing power and future capabilities.
"Basically what he was telling you and being very modest about it is that NVIDIA is breaking Moore's Law. And they're breaking Moore's Law to the upside."

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134. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang's Relentless AI Obsession Fuels Nvidia's Trillion-Dollar Rise
Date: 2025-09-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's strong financial performance despite trade restrictions, Jensen Huang's intense work ethic and leadership style, and his influence beyond Nvidia, including mentorship in AI startups. It highlights Nvidia's strategic position in the AI sector and Huang's role in shaping the company's AI dominance.
"I work from the moment I wake up, to the moment I go to sleep, revealing a restlessness more intense than even Elon Musk's legendary grind."

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135. Bloomberg Intelligence

Episode: Bloomberg Tech Special: Nvidia CEO Jensen Huang on Upbeat Forecast
Date: 2025-11-20 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses strong demand and sales for Blackwell and Vera Rubin GPUs, emphasizing NVIDIA's robust supply chain and partnerships with key suppliers. He provides an upbeat forecast on NVIDIA's AI-focused hardware and strategic planning for upcoming product generations.

"Sales are off the charts for Blackwell and NVIDIA GPUs in the cloud are sold out. We got plenty of Blackwells to sell you, and a bunch of Vera Rubins coming. Business is very, very strong."

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136. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang Unveils AI Drug Lab with Lilly While Reddit Memes His 121 AI Mentions at CES
Date: 2026-01-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's recent activities including unveiling NVIDIA's AI drug lab with Lilly, showcasing new AI hardware and platforms at CES 2026, and his vision on AI's impact in industries such as healthcare, manufacturing, and computing. It highlights NVIDIA's focus on AI innovation and strategic positioning away from gaming towards AI-driven revenue streams.

"Jensen declaring AI reshaping ten trillion in computing."

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137. Robotics Industry Insider: AI & Automation News

Episode: Robots Got Swagger: Why Jensen Huang Says This Is the ChatGPT Moment for Factory Floors
Date: 2026-02-03 | Relevance: 85/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's partnership with FANUC in AI-driven robotics, highlighting Jensen Huang's characterization of the current surge in industrial robotics as the 'ChatGPT Moment' for factory floors, indicating the significant impact of AI integration in industrial automation. The discussion includes market dynamics, supply chain considerations, and technological trends enhancing productivity through AI and robotics.

"NVIDIA's Jensen Huang calling it the ChatGPT Moment for Robotics."

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138. Tech Update | BNR

Episode: Ceo Nvidia: 'Risico te groot voor Chinese leger om gebruik te maken van onze chips'
Date: 2025-07-14 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang discusses concerns about the U.S. government's restrictions on exporting Nvidia chips to China, emphasizing that the Chinese military is unlikely to use American chips due to risks and limits of supply, and warns that export restrictions may stimulate China's domestic tech development, impacting the competitive landscape.

""The Chinese military will avoid using American technology because of the risks involved, and with supply easily restricted, they cannot rely on these materials.""

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139. Schwab Network

Episode: Jensen Huang Criticizes Chip Export Restrictions Ahead of NVDA Earnings
Date: 2025-05-22 | Relevance: 85/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses investor anticipation ahead of NVIDIA's Q1 earnings on May 28th, focusing on challenges from US export controls impacting key chips for the China market and expectations for significant revenue and earnings growth. It also references Jensen Huang's criticism of these export restrictions.

"I'll talk a little bit about some of Jensen Wong's recent comments firing back about those export controls."

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140. US News Today | 2 Min News | The Daily News Now!

Episode: Nvidia CEO to Hold Media Briefing in Beijing on July 16
Date: 2025-07-13 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia CEO Jensen Huang's upcoming media briefing in Beijing, highlighting the significance of the Chinese market, US export restrictions on Nvidia's advanced chips to China, competition from Huawei, and Nvidia's strong business presence in China.

"His visit is drawing heightened attention as both U.S. and Chinese officials closely watch how American tech companies engage in the region."

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141. Tech Brew Ride Home

Episode: Thu. 04/17 - Mooooaaar Models!
Date: 2025-04-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's recent trip to China amid U.S. export restrictions, highlighting NVIDIA's efforts to maintain its presence in the Chinese market by considering new chip designs despite regulatory challenges. It touches on financial impacts of export controls and NVIDIA's strategic responses to competition and supply chain issues.

"Huang said China was a very important market for NVIDIA and expressed hope that his company could, quote, continue cooperating with the country, according to state broadcaster CCTV."

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142. Bitcoin & Crypto News Today | 2 Min News | The Daily News Now!

Episode: Nvidia's AI Revolution: Rubin & Vera Chips
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA CEO Jensen Huang's comments on the soaring demand for computing power driven by AI advancements. It highlights NVIDIA's next-gen Rubin and Vera chips entering full production, which promise to significantly boost AI computing performance.

"Huang pointed out that AI models keep jumping ahead by a factor of 10 every single year. That means the need for NVIDIA's graphics processing units is exploding too, turning everything into a massive computing challenge."

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143. CNBC's "Fast Money"

Episode: Nvidia's GTC Conference Underway... And Fed Decision On Deck 3/18/25
Date: 2025-03-18 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent GTC conference where CEO Jensen Huang addressed the company's AI strategy, announced partnerships and chip timelines, but the stock fell despite the new information. Analysts debate the implications of the keynote and market expectations amid increasing competition.

"The theme of this unscripted keynote for two hours was really about maintaining dominance in the face of increasing competition."

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144. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang's Record $20B AI Acquisition Reshapes Nvidia's Future Empire
Date: 2025-12-27 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast details Jensen Huang's strategic $20 billion acquisition of AI chip startup Grok by NVIDIA, emphasizing its potential to enhance NVIDIA's AI factory architecture and solidify its market dominance. It also covers Huang's recent lobbying efforts in Washington regarding AI chip export restrictions to China and his upcoming keynote at CES 2025.

"Jensen Huang, Nvidia's relentless CEO, just orchestrated his biggest power move yet with a blockbuster $20 billion cash acquisition of AI chip startup Grok's key assets."

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145. Na Radarze

Episode: Nvidia w rywalizacji USA vs Chiny. Historia od powstania, RIVA TNT, GeForce po AI | Jamal Szpalerski
Date: 2025-09-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast provides a detailed discussion on Nvidia's history, its challenges such as near-bankruptcy in 1999, its AI successes, and its position in the US-China chip competition landscape. It also touches on internal US competition and Nvidia's recruitment philosophy, along with background on key personnel involved in its technological advancements.

"Nie jest przesada powiedziec, ze jest to jedna z najpotezniejszych, jesli nie najpotezniejsza firma swiata."

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146. Business Wars

Episode: How Nvidia Owned A.I. | Light Speed or Bust | 1
Date: 2025-12-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses Nvidia's dominant position in the AI chip market, its significantly better than expected financial performance, and its rapid ascent to becoming the most valuable company globally driven by AI demand. It highlights Nvidia as the key enabler in the AI boom, analogous to an arms dealer or shovel seller during a gold rush.

""Nvidia owns nearly 90% of the market for AI chips. If generative AI is like the California Gold Rush, well, Nvidia is the guy selling shovels to miners.""

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147. What Next: TBD | Tech, power, and the future

Episode: Trump Dips into NVIDIA's Chips
Date: 2025-08-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's strategic navigation of U.S.-China export restrictions, highlighting a unique deal where NVIDIA agrees to give a percentage of chip sales to the U.S. government to secure export licenses to China. It emphasizes Huang's role in managing geopolitical challenges and advancing NVIDIA's position as a key player in AI-related chip supply.
"The U.S. will get 15 percent of the Chinese sales of an NVIDIA chip called the H20 and the same percentage from NVI."

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148. Renta 4 Banco

Episode: El circulo virtuoso de las tecnologicas sostiene a las Bolsas, pero la liquidez ayuda
Date: 2025-11-03 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang, NVIDIA's CEO, discussed the virtuous cycle of AI adoption, investment, and market expansion at the APEC CEO forum, emphasizing AI's revolutionary impact surpassing past innovations like the internet and smartphones. The discussion highlights NVIDIA's significant market valuation and the role of financing in enabling technological advances.
"La inteligencia artificial ha alcanzado un circulo virtuoso al conseguir que, gracias a las enormes inversiones realizadas, cada vez mas gente utilice la inteligencia artificial, propiciando asi nuevas y mayores inversiones que a su vez redundan en un mayor uso de la inteligencia artificial."

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149. Sharp China with Bill Bishop

Episode: (Preview) Nvidia Can Sell H20 Chips to China Again; Trump Softening on China?; A Flurry of Xi Activity; Yang Hansen at NBA Summer League
Date: 2025-07-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the Trump administration's reversal to allow Nvidia to sell its H20 AI chip to China again after previous restrictions, highlighting Nvidia's efforts to comply with export rules by developing a lower-performance chip. The move is seen as positive for Nvidia's business and trade relations with China.
"Nvidia said it has received assurances from the Trump administration that it can sell its H20 artificial intelligence chip in China days after chief executive Jensen Wang met President Trump."

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150. InsiderX4

Episode: Apple VISION PRO bajo presion y la GUERRA de CHIPS entre EE. UU. y CHINA
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: Jensen Huang, CEO of NVIDIA, expresses concern on a podcast about China's rapid advancement in chip manufacturing, highlighting the impact of U.S. restrictions on NVIDIA's dominant position in the Chinese AI chip market. He calls for the removal of U.S. vetoes to allow free competition in China.
"China esta a nanosegundos de Estados Unidos en fabricacion de chips."

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151. WSJ Tech News Briefing

Episode: TNB Tech Minute: Nvidia's Jensen Huang Takes the Stage at 'AI Super Bowl'
Date: 2025-03-18 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast covers NVIDIA's Developers Conference where CEO Jensen Huang introduced Rubin, a next-generation AI chip with significant computing power improvements. The discussion includes new partnerships with General Motors and Yum! Brands, highlighting NVIDIA's expanding AI applications and its impact on various industries, but also notes a dip in NVIDIA's stock amid broader tech sell-offs.
"Chief Executive Jensen Huang took the stage before an audience of 25,000 to unveil Rubin, it's NVIDIA's next-generation artificial intelligence chip named after the astronomer who discovered dark matter."

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152. El Nexo Tecnologico

Episode: NVIDIA asegura que China tiene las mejores IA de codigo abierto del mundo. Estas alabanzas tienen una intencion muy clara
Date: 2025-07-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's visit to China, highlighting NVIDIA's strategic importance in the Chinese market and his praise of China's open-source AI models as part of a nuanced approach balancing admiration with competition. It also covers NVIDIA's efforts to maintain its presence amid U.S. trade restrictions, emphasizing China as the company's third largest market.
"Los modelos de inteligencia artificial, IA, de codigo abierto de DeepSync, Kuen y Kimi, son los mejores modelos de razonamiento del mundo actualmente. Son muy avanzados."

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153. El Nexo Tecnologico

Episode: NVIDIA asegura que China tiene las mejores IA de codigo abierto del mundo. Estas alabanzas tienen una intencion muy clara
Date: 2025-07-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic recognition of China's open-source AI advancements, highlighting Jensen Huang's efforts to maintain NVIDIA's presence in the Chinese market amidst U.S. restrictions, including showcasing specific AI models while navigating competitive dynamics.

""Los modelos de inteligencia artificial, IA, de codigo abierto de DeepSync, Kuen y Kimi, son los mejores modelos de razonamiento del mundo actualmente. Son muy avanzados.""

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154. The AI Podcast

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of shipping its H20 AI chips to China after regulatory delays, the background on the US restrictions, and the expected significant revenue impact for Nvidia. It also touches on related AI models including Nvidia's Numatron 70b.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

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155. Deep Questions AI

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-10-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's reinstatement of shipments of its H20 AI chips to China after regulatory delays, including the impact on revenue and the background of US restrictions. The discussion highlights significant growth potential and strategic developments for Nvidia in AI chip sales to China.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, which is going to add billions of dollars to Nvidia's overall revenue."

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156. Midjourney

Episode: Nvidia's Strategic Shift on China
Date: 2025-07-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of chip shipments to China, the regulatory challenges faced, and the financial impact of this move, highlighting a major strategic shift for the company. It also mentions Nvidia's AI model offering as part of a broader discussion on AI technologies.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, and this is really going to add billions of dollars to Nvidia's overall revenue."

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157. AI in Business

Episode: Nvidia's Strategic Shift on China
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of shipping H20 AI chips to China after regulatory restrictions, highlighting the significant revenue implications and the strategic changes enabling this shift. It also briefly mentions NVIDIA's involvement in AI model releases like Numatron 70B.

"NVIDIA's made a big announcement, essentially restarting the sale of their H20 AI chips to China, which is going to add billions to their overall revenue."

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158. Practical: AI & Business News

Episode: AI Chips Flow Again: Nvidia in China
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of shipping AI chips to China after regulatory restrictions, the background of the situation, and the positive impact on Nvidia's revenue.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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159. AI Applied: Covering AI News, Interviews and Tools - ChatGPT, Midjourney, Gemini, OpenAI, Anthropic

Episode: Nvidia's China Comeback
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast episode discusses NVIDIA's ability to resume shipments of their H20 AI chips to China after regulatory hurdles, the financial impact expected from this comeback, and provides background on the situation.
"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers and the reason why they're back on track is also quite a crazy story."

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160. Acquired AI

Episode: AI Chips Flow Again: Nvidia in China
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's resumption of shipping H20 AI chips to China after regulatory hurdles, the impact on revenue, and the background of U.S. export restrictions affecting the company.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, adding billions of dollars to their overall revenue."

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161. TechDaily.ai

Episode: NVIDIA Halts $100B OpenAI Deal: Is the AI Boom Facing a Crisis?
Date: 2026-02-03 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's decision to halt a $100 billion deal with OpenAI, highlighting concerns about the AI market and NVIDIA's strategic move that signals a lack of confidence in OpenAI's competitive prospects.
"So what happens when the company that sells the shovels NVIDIA decides that the biggest digger in the field, OpenAI, isn't worth betting on anymore? The shovel provider loses faith in the whole gold mine."

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162. Imagen Empresarial

Episode: Imagen Empresarial 20 nov 25
Date: 2025-11-21 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's strong financial performance with 62% revenue growth and highlights CEO Jensen Huang's comments on high demand for their Blackwell processors and significant purchase orders projected for 2026. It reflects positively on the company's market positioning and outlook.
"En el reporte, Jensen Huang, el CEO de la empresa, destaco que las ventas de su procesador Blackwell estan fuera de cualquier escala, es decir, tienen mucha demanda en frente."

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163. Web3 Wavefronts - Digestible News on Crypto, DeFi and AI

Episode: Nvidia's Unstoppable AI Startup Investment Strategy Revealed
Date: 2025-03-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's dominant AI startup investment strategy, highlighting its substantial funding rounds and superiority over competitors like Microsoft and Google in AI investments during the previous year. It emphasizes NVIDIA's strategic role in AI funding, mentioning specific deals including OpenAI, XAI, Wave, and Scale AI.
"NVIDIA continues to outdo competitors like Microsoft and Google in the number and value of funding rounds for AI startups."

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164. Nachrichten

Episode: Nachrichten - 2025-05-23
Date: 2025-05-23 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: NVIDIA's CEO Jensen Huang emphasized Taiwan's pivotal role in the global AI industry and announced significant advancements in Agentic AI technology in 2025 during his visit to Taiwan. The discussion highlights NVIDIA's leadership in AI development and its collaborative efforts with Taiwanese partners such as TSMC and Foxconn, focusing on building AI infrastructure and advancing next-generation AI systems.
"Taiwan werde entscheidend dazu beitragen, kunstliche Intelligenz in die Welt zu tragen, gemeinsam mit Partnern wie NVIDIA."

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165. Global News Podcast

Episode: Nvidia's $1 Billion AI Startup Domination Strategy
Date: 2026-01-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast episode provides a comprehensive overview of Nvidia's AI investments throughout 2024, discussing over 67 venture deals and exploring the strategy behind investing in startups that subsequently purchase Nvidia's GPUs for AI computation. The host breaks down the companies involved, investment amounts, and the dynamics of money round tripping within Nvidia's AI ecosystem.

"Nvidia's will give money to companies that are going to just turn around and give the money back to Nvidia to buy GPUs for compute for AI."

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166. Hugging Face

Episode: Apple's AI Strategy vs Nvidia's Power Moves
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic acquisition of a 4% stake in Intel to co-develop AI-focused CPUs and GPUs, highlighting its significance in reshaping the AI hardware market and solidifying NVIDIA's dominance before AMD can catch up. It also contrasts NVIDIA's strong financial performance with Intel's struggles and emphasizes the partnership's impact on future PC chip designs.
"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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167. AI HR

Episode: The Week in AI: Apple's Innovation, Intel's Strategy, Nvidia's Growth
Date: 2025-10-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic partnership with Intel, highlighting a $5 billion investment and collaborative development of AI chips, which strengthens NVIDIA's dominance in AI hardware against competitors like AMD. It also notes NVIDIA's record-breaking financial quarter and Intel's challenges, framing the deal as a significant move for industry survival and growth.
"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it. 4% of Intel instantly becoming one of Intel's largest shareholders."

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168. Breaking News To Trading Moves

Episode: Nvidia's Bid for AI21 Labs and AI Vertical Integration
Date: 2025-12-31 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's advanced acquisition talks for Israeli AI startup AI21 Labs, highlighting NVIDIA's strategic move to expand vertically in AI beyond hardware by integrating software, foundation models, and top-tier AI talent. The acquisition is portrayed as a significant step to accelerate NVIDIA's AI capabilities and market position.
"So when a company like NVIDIA, which is, you know, it's a silicon and infrastructure giant, looks at spending billions on a software and model company, the motivation isn't simple. It's not just about adding a feature. No, not at all. It's about getting your hands on a stylish foundation models, enterprise-ready AI products, and this is maybe the most critical piece, acquiring top-tier AI talent."

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169. AI Investing: for the AI Investor

Episode: AI News Roundup: Top 10 Stories
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic acquisition of a significant stake in Intel to co-develop AI-optimized chips, positioning NVIDIA to maintain dominance in the AI hardware market while stabilizing Intel's struggling business. This move is framed as a major power play for survival and innovation in AI infrastructure.
"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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170. Simply Tech

Episode: Nvidia's Blackwell GPUs Unveiled, Microsoft 365 Price Hike, and Alphabet's $32B Wiz Acquisition
Date: 2025-03-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses NVIDIA's unveiling of its next-generation Blackwell GPU architecture at the GTC 2025 conference, highlighting substantial advancements in GPU technology aimed at enhancing AI capabilities and accelerated computing. It details technical improvements such as increased memory and floating-point performance, signaling significant progress in AI model efficiency and performance.
"NVIDIA CEO Jensen Huang highlighted that these advancements could lead to"

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171. AI News Daily

Episode: Nvidia Transforms Robotics Landscape, GitHub CEO Resigns Amid AI Concerns, AI Enhances Emergency Department Efficiency, EXL Opens AI Lab in Dublin, and more...
Date: 2025-08-12 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent advancements in AI robotics, including the launch of new Omniverse SDKs, Cosmos World Foundation models, and infrastructure upgrades like RTX Pro Blackwell servers and DGX cloud, highlighting the impact on robotics development and AI workloads.
"Nvidia's CEO has emphasized the transformative impact of AI on computing, stating it is reinventing data center architecture for the first

time in 60 years."

172. Members Podcast

Episode: Members Podcast - Thursday 27 February
Date: 2025-02-27 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode provides a detailed discussion of NVIDIA's recent financial results and market performance, highlighting strong revenue and demand for new products, especially in the data center segment. The speaker notes that NVIDIA's results have stabilized sentiment in the tech sector and that the uptake of the new Blackwell chips has been exceptionally strong.
"The CEO said demand for Blackwell is amazing, stock was up 3.7% in normal trading, regular trading ahead of the result, the main focus was on data centre sales and they were up 93% and that was ahead of consensus."

173. AI Daily

Episode: AI Infrastructure Revolution: Iren's Rise and NVIDIA's Strategic Moves
Date: 2025-10-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic moves to maintain leadership in AI hardware, including its partnership with Samsung Foundry to develop custom AI CPUs and XPUs, and advancements like NVIDIA Link Fusion for integrating processors. It highlights NVIDIA's shift from GPU manufacturing to orchestrating a broader AI hardware ecosystem in response to competition and evolving industry dynamics.
"To preserve its leadership in the face of growing competition and evolving industry dynamics, NVIDIA is embracing strategic change."

174. The Human in the Loop

Episode: AI Reality before Christmas
Date: 2025-12-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's innovative hardware approach with the Nemetron 3 Nano and its hybrid Mamba transformer architecture, enabling much more efficient and scalable AI processing with a massive token context window. It highlights NVIDIA's ecosystem play and hardware dominance in addressing computational bottlenecks in large language model processing.
"Okay, so the standard transformer architecture, the foundation of all modern LLMs, it scales quadratically. As your context window grows, the compute cost just explodes exponentially... And that's why Nemetron 3 Nano supports a massive one million token context window."

175. Members Podcast

Episode: Members Podcast - Thursday 26 June
Date: 2025-06-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent shareholder meeting and the positive market reaction to its AI strategy, highlighting strong growth in automotive and robotics revenue segments and bullish analyst target prices.
"A broker upgraded NVIDIA yesterday, has a target price of $250 when the share price is currently $154, indicating a 63% upside, reflecting strong demand for chips driven by AI, automotive, and robotics sectors."

176.

Episode: !AI11
Date: 2025-09-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast provides a detailed overview of AI infrastructure investment, highlighting NVIDIA's dominant role in GPU technology essential for AI computing. It discusses NVIDIA as a key player in AI investment strategies and emphasizes the company's critical position in the growing AI ecosystem, especially in data center infrastructure and computing power.
",, GPU, NVIDIA, NVDA. NVIDIA. , AI."

177. The AI News Daily Brief

Episode: Mind-reading AI, U.S.-China Tech Rivalry, and Nvidia's European AI Partnership
Date: 2025-06-16 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic partnership with Europe to build a significant AI infrastructure, including deployment of NVIDIA Blackwell compute resources, expansion of AI technology centers, and Jensen Huang's view on AI as essential infrastructure for the industrial revolution. It situates this within the broader context of geopolitical tech rivalry and AI development.
"Every industrial revolution begins with infrastructure. AI is the essential infrastructure of our time, just as electricity and the Internet once were."

178. News Today - Business

Episode: Silicon Showdown: Nvidia Courts TSMC in AI Chip Race
Date: 2025-11-16 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia CEO Jensen Huang's call to TSMC for increased chip wafer supplies amid slowing overall chip growth, highlighting Nvidia's critical position in the AI chip race and the strategic importance of supply chain access. It also touches on the market impact and competitive tensions Nvidia faces in maintaining its leadership in AI hardware innovation.

"Nvidia CEO Jensen Huang publicly revealed he had personally called on TSMC for more chip wafer supplies to keep up with the relentless demand for advanced AI hardware."

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179. TechCheck

Episode: Nvidia's H20 China delays, plus the rise of AI companions 7/21/25
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's challenges and delays in resuming sales of its AI H20 chips in China due to export license roadblocks and inventory issues, with expectations for limited short-term sales and longer-term revenue recovery. It highlights supply chain complexities and financial write-downs affecting the China market segment.

"NVIDIA isn't expecting any meaningful H20 revenue from China until late this year and likely won't see a steady sales cycle for this particular chip until after the October quarter due to export license delays and inventory challenges."

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180. GoodNightCoffee

Episode: ():AI,OpenAI,,GPUIPO
Date: 2025-10-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's milestone event unveiling the first made-in-America Blackwell chip wafer, highlighting the collaboration with TSMC to strengthen the domestic supply chain and advance AI technology. It also mentions NVIDIA CEO Jensen Huang's upcoming participation in the APEC CEO Summit to promote technological growth.

"NVIDIA CEO Jensen Huang and TSMC Operations Vice President YL Huang jointly attended the celebration and signed the first Blackwell wafer to commemorate this important moment."

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181. Chip Stock Investor Podcast

Episode: Episode 296: Nvidia and TSMC Pledge Huge Investments to Address Tariffs - NVDA and TSM Stock Analysis
Date: 2025-04-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's recent $5.5 billion charge linked to inventory adjustments due to export license challenges for its H20 products, as well as its partnership with TSMC in the United States and ongoing semiconductor industry trends. The tone acknowledges the financial impact but notes that Nvidia can absorb the charge while awaiting management commentary.

"A $5.5 billion charge to Nvidia's bottom line is definitely something they can handle, but certainly not good."

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182. Web3 Wavefronts - Digestible News on Crypto, DeFi and AI

Episode: Nvidia's bold move to build AI chips in the US ignites a manufacturing revolution
Date: 2025-04-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic move to manufacture AI chips and supercomputers domestically in the US, highlighting the company's investments in manufacturing facilities, potential job creation, and supply chain strengthening amid evolving trade policies. Jensen Huang is quoted expressing optimism about meeting AI demand and reinforcing the supply chain.

"NVIDIA founder Jensen Huang expressed that this move will help meet the rising demand for AI chips and supercomputers while strengthening the supply chain."

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183. AI + a16z

Episode: Dylan Patel on the AI Chip Race - NVIDIA, Intel & the US Government
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's unexpected $5 billion investment in Intel, highlighting this collaborative move as a significant and positive industry development, with analyst Dylan Patel noting the investment's immediate profit impact and strategic value.

"Jensen is like the Buffett effect for the semiconductor world."

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184. Nvidia Stock News Tracker - Daily

Episode: Nvidia's AI Dominance: A Semiconductor Giant's Soaring Success in 2025
Date: 2025-02-17 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong performance in the AI chip market, CEO Jensen Huang's optimistic outlook for 2025, expansion of the supply chain, significant revenue growth especially in data centers, and strong analyst price targets. It also highlights the

company's impressive financial results and stock market success, while mentioning some competitive risks.

"Nvidia's CEO, Jensen Huang, has expressed optimism about the company's business outlook for 2025, citing the expansion of its supply chain and the growing demand for AI chips."

185. Bedell Frazier Investment Counselling

Episode: National Security Meets Free Markets

Date: 2025-08-29 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: This podcast episode discusses NVIDIA's leading role in the AI chip market, highlighting its strong quarterly revenue and earnings growth driven by high demand and supply constraints. It also addresses geopolitical impacts on sales to China, customer concentration risks, and cautious outlook on future revenues despite robust industry spending on AI infrastructure.

"NVIDIA has been the undisputed leader in the race. Companies, both at home and abroad, have scrambled to get their hands on NVIDIA's chips. Demand significantly outstrips supply. That sends prices higher."

186. TechCrunch Industry News

Episode: Nvidia says it plans to manufacture some AI chips in the U.S.

Date: 2025-04-16 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Nvidia CEO Jensen Huang's announcement regarding Nvidia's strategic shift to manufacture AI chips in the U.S., emphasizing investment in domestic production facilities and strengthening supply chain resilience. It highlights Nvidia's goal to produce substantial AI infrastructure domestically and praises the company's efforts to avoid export controls by partnering with the U.S. government.

"The engines of the world's AI infrastructure are being built in the United States for the first time, said Nvidia CEO Jensen Huang in a statement. Adding American manufacturing helps us better meet the incredible and growing demand for AI chips and supercomputers, strengthens our supply chain, and boosts our resiliency."

187. Nvidia Stock News Tracker - Daily

Episode: Nvidia Stock Analysis: AI Leader's Upside Potential, Insider Selling, and Earnings Outlook

Date: 2026-01-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast provides a detailed overview of NVIDIA's stock performance, analyst price targets, supply chain updates including TSMC capacity expansions, insider selling activity, and anticipations for upcoming earnings focused on Vera Rubin and Blackwell chip production. It highlights optimism about NVIDIA's growth potential in AI while noting some market hesitations due to insider sales.

""Excitement builds for fourth-quarter earnings on February 25, 2026, focusing on Vera Rubin production and Blackwell ramps as the street highlights TSMC capacity expansions, alleviating supply issues.""

188. Schwab Network

Episode: NVDA Geopolitical & Competition Risk, META Potential Despite Tariffs

Date: 2025-04-17 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast features an equity analyst discussing NVIDIA's recent stock pullback driven by a $5.5 billion charge, geopolitical risks particularly related to trade restrictions with China, and increasing competition from companies like Huawei. The analyst views NVIDIA as high quality but cautions that these factors could slow growth and advises caution for investors until more clarity emerges.

""It's still a very, very high quality company. But that competition and those geopolitical factors could actually decelerate their bottom line growth even further than what's estimated right now.""

189. Rise N Shine_63

Episode: Tech & Business Week in Review: 14 - 21 Sept, 2025

Date: 2025-09-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses a $31 billion UK-US tech deal focusing on AI and quantum computing, highlighting Nvidia CEO Jensen Huang's role and Nvidia's 2 billion investment in UK AI startups as part of a strategic synchronization with government initiatives to shape future market standards and infrastructure.

"Nvidia's CEO, Jensen Huang, was visiting the UK right when Nvidia pledged 2 billion for British AI startups, it wasn't a coincidence."

190. Schwab Network

Episode: Year in Review for NVDA: DeepSeek, China Sales, GOOGL & AMD Competition

Date: 2026-01-02 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive

Listen to Episode

Summary: Matthew Bryson from Wedbush Securities discusses NVIDIA's strong 2025 performance amidst external challenges like China-US chip shipment restrictions and highlights bullish catalysts for 2026, including renewed chip spending in China. The conversation touches on NVIDIA's AI demand resilience and competition concerns.

"Regardless of what happens externally, there is so much demand for AI that even some road bumps aren't enough to offset the spending."

191. AI News Daily

Episode: OpenAI Unveils GPT-4.5, Meta Launches AI Chatbot App, Amazon Launches Smarter Alexa+, Nvidia Posts Record Revenue, and more...

Date: 2025-02-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Nvidia's record revenue driven by AI demand, CEO Jensen Huang's comments on the successful Blackwell AI supercomputer sales, competition from AMD, Intel, and Chinese firms, and challenges from geopolitical uncertainties affecting production strategies. Nvidia maintains a cautiously optimistic outlook on growth driven by AI infrastructure and data center capital expenditures.

"CEO Jensen Huang pointed to the successful ramp-up of Blackwell AI supercomputers, which generated billions in sales within their first quarter."

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192. Nvidia Stock News Tracker - Daily

Episode: Nvidia's AI Chip Dominance Drives Stock Surge Amid Tech Sector Turbulence

Date: 2025-08-01 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses the surge in NVIDIA's stock driven by strong demand for its AI chips such as the H100, A100, and the upcoming Blackwell family, with major tech firms increasing their capital expenditures citing NVIDIA's dominance. Analysts have raised targets reflecting optimism about NVIDIA's AI-driven growth, amidst some supply chain and competition considerations.

"Tech titans like Microsoft and Meta Platforms have just announced massive increases in capital spending, specifically citing NVIDIA's dominant H100 and A100 graphics processors as central to their data center and cloud strategies."

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193. The Rundown

Episode: Why Nvidia's Grip on China Won't Last Forever | Gil Luria

Date: 2025-08-31 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast features an interview with Gil Luria, an analyst who discusses Nvidia's strong position in AI computing, bullish stock outlook, and the challenges related to China as a market. Luria emphasizes Nvidia's lead in the AI compute space and the continued demand for their technology across cloud providers and AI developers.

"Nvidia is going to be okay. We are, big picture, using AI a lot more. The models have gotten so good, and they're so compute intensive because of how powerful they are that we need more and more compute capacity. And Nvidia is not the only game in town, but it's the main game in town."

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194. Bannon`s War Room

Episode: Episode 4986: AI Race Is Becoming More Of A Battle; Competition Of AI

Date: 2025-12-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses recent U.S. policy changes allowing export of NVIDIA's H200 chip to China, highlighting its significance as a high-performance AI chip that surpasses both Chinese domestic chips and current U.S. offerings. The discussion centers on the strategic importance of NVIDIA's chips for AI development, national security, and economic competitiveness, as well as the broader context of U.S.-China AI technology competition.

"Yesterday or two days ago, President Trump announced that the NVIDIA H200 chip could be exported to China. So this is not NVIDIA's most powerful chip, but it is their second most powerful chip. It's the best chip of the previous generation. And most importantly, it is substantially better than anything available in China."

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195. Nvidia Stock News Tracker - Daily

Episode: Nvidia's AI Surge Fuels Soaring Stock Price: Analysts Bullish on 37% 2026 Gains and 1,343% 5-Year Run

Date: 2026-01-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Nvidia's recent stock performance driven by high AI chip demand, Jensen Huang's CES 2026 keynote announcements including the Vera Rubin AI data center platform and a significant $20 billion deal with AI chipmaker Grok, alongside bullish analyst ratings and earnings forecasts.

"Chief Executive Jensen Huang describing artificial intelligence chip demand as very high, unveiling the groundbreaking Vera Rubin artificial intelligence data center platform for late 2026 with six new chips and noting a deal with AI chipmaker Grok valued up to $20 billion US dollars."

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196. Nvidia Stock News Tracker - Daily

Episode: Nvidia's AI Dominance Faces New Challenges Amid Soaring Demand and Competitive Pressure

Date: 2025-09-10 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses Nvidia's stock performance, strong earnings, and competitive pressures from rivals like Broadcom and Google in the AI compute market. While most analysts remain positive with buy ratings and price targets suggesting upside, caution exists due to recent revenue misses in the data center segment and dependence on major customers.

"Citigroup has trimmed its price target from $210 to $200 US, citing rising competition from companies like Broadcom and Google,

particularly as these rivals ramp up the market for custom processors that threaten Nvidia's dominance in artificial intelligence compute."

197. Nvidia Stock News Tracker - Daily

Episode: NVIDIA's AI Dominance Challenged: Navigating Geopolitics and Market Volatility
Date: 2025-05-02 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's recent stock performance amid geopolitical challenges, heightened competition, and US export restrictions impacting revenue prospects. Despite strong earnings and a remarkable transformation into an AI leader, investor sentiment is mixed due to volatility and tempered earnings results.
""US export restrictions on AI chips to China have negatively impacted Nvidia's revenue prospects, and rising competition from firms like Huawei has further contributed to the stock's decline.""

198. The AI News Daily Brief

Episode: Nvidia's GR00T N1, Stability AI's Camera, and Google's Gemini Updates
Date: 2025-03-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's announcement of the Isaac GR00T N1 model, highlighting its applications in humanoid robotics and the AI strategy behind it as articulated by CEO Jensen Huang. It emphasizes the model's innovative dual-system architecture that mimics human cognition, offering significant advances in robot reasoning and autonomous task execution.
"NVIDIA's founder and chief executive officer Jensen Huang believes that this model, along with new data generation and robot learning frameworks, is set to open the next frontier in AI."

199. AI Unraveled: Latest AI News & Trends, ChatGPT, Gemini, DeepSeek, Gen AI, LLMs, Agents, Ethics, Bias

Episode: AI Daily News Aug 12 2025: GitHub joins Microsoft AI as its CEO steps down, Nvidia's new AI model helps robots think like humans, China urges firms not to use Nvidia H20 Meta's AI predicts brain responses to videos and more
Date: 2025-08-12 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent release of Cosmos Reason, a seven billion parameter vision-language model designed to give robots common sense reasoning abilities in the physical world, reflecting NVIDIA's advancements in AI capabilities and their push into physical AI. The discussion highlights how this model enables robots to understand and predict physical events, illustrating NVIDIA's leadership in the AI robotics space.
"They just released Cosmos Reason. It's a seven billion parameter vision language model... It can predict physical events using common sense."

200. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: Are AI Browsers the Next Big AI Trend?
Date: 2025-07-12 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent market milestone as the first AI company to briefly surpass a $4 trillion market cap and details about their upcoming AI chip for the Chinese market, including compliance with U.S. export controls and strategic positioning by CEO Jensen Huang. It also touches on the challenges of export controls and the company's views on the matter.
"NVIDIA is sticking to their view that locking China out of U.S.-made AI chips is the wrong strategy."

201. The FinanceNow Podcast

Episode: The AI Trade Is Still On
Date: 2025-08-31 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong recent earnings performance, highlighting significant year-over-year revenue growth and beating expectations on both top and bottom lines. It notes the company's rapid expansion, particularly in data center revenue, while also mentioning the exclusion of China numbers from results and guidance.
"NVIDIA results did not disappoint. They did beat on both the top and bottom line. EPS came in at $1.05 adjusted versus the estimated $1.01, with revenue at $46.74 billion versus the expected $46.06 billion, marking a 56% rise from a year ago."

202. The Peak Daily

Episode: Let's get AI physical
Date: 2026-01-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's announcement of Alpameo, an autonomous vehicle platform, and the company's expansion into physical AI with new models and tools for generalist robotics. It highlights partnerships with Mercedes and plans for a robo taxi service, signaling NVIDIA's strategic pivot into physical AI applications.
"The CEO of the world's most valuable company said that the chat GPT moment for physical AI is almost here."

203. AI News Daily

Episode: AI Endangers Entry Jobs, Nvidia Invests in Intel, Africa AI Conference 2025, Karpathy Urges Patience, and more...
Date: 2025-10-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic $5 billion investment in Intel to enhance AI capabilities and the partnership's role in boosting competitive positioning against major rivals, highlighting CEO Jensen Huang's confidence and collaborative relationship with Intel. The discussion includes NVIDIA's strong AI-driven revenue and the industry's impact on entry-level employment.
"NVIDIA CEO Jensen Huang expressed confidence in the partnership, noting his new role as an Intel shareholder and highlighting Intel's stock surge of over 51% in the past month and 84% year to date, calling their relationship 'lovers, not fighters.'"

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204. Connecting the Dots

Episode: Connecting the Dots - 7-15-25
Date: 2025-07-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the US government's partial reversal on the ban of AI chip sales to China, highlighting Nvidia CEO Jensen Huang's lobbying efforts and the positive market reaction to Nvidia being allowed to resume sales. It also touches on strategic competition with China and the implications for Nvidia's market share and AI chip sales.
"There was even a meeting recently between Nvidia's CEO, Jensen Huang, and former President Trump."

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205. Bloomberg Talks

Episode: Nvidia, Siemens CEOs Talk Building Industrial AI Operating System
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features a detailed discussion with NVIDIA CEO Jensen Huang about the company's AI strategy, specifically their partnership with Siemens on an industrial AI operating system aimed at scaling AI applications in manufacturing. Huang highlights existing deployments using digital twins and AI optimization in production processes, illustrating NVIDIA's forefront position in the AI industrial revolution.
"Well, I mean, this technology is already in place and it's working. I mean, we see there are many examples, and I brought some on stage today, where you have customers starting with a digital twin of a product they want to manufacture, a digital twin of the manufacturing side, and bring that all together. And not before that, you have it optimized, then build it in the real world. And AI is already working on the shop"

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206. Silicon Siege: China's Tech Offensive

Episode: Silicon Siege: China's Tech Moves Make Sun Tzu Blush
Date: 2025-08-08 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses allegations of industrial espionage involving NVIDIA's H100 AI chips being trafficked to China, supply chain security concerns, and accusations from China about remote access features in NVIDIA's chips. NVIDIA CEO Jensen Huang denies these accusations, reflecting tensions in the geopolitical and security landscape impacting the company.
"Nivi's CEO Jensen Huang gave it the side-eye, denying everything and declaring that"

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207. Beijing Bytes: US-China Tech War Updates

Episode: Beijing Bytes: Murky Pandas Crash the Cloud Party & Nvidia Plays Chip Limbo
Date: 2025-08-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses recent developments in U.S.-China tech tensions impacting NVIDIA, including U.S. export restrictions on NVIDIA's AI chips, China's regulatory pressures and suspicion of backdoor security issues, Jensen Huang's summoned appearance before Chinese regulators, and NVIDIA's strategic chip production adjustments with the new Blackwell-based B30A chip.
"Chinese regulators just pressured local giants, like Alibaba and Bike Dance, to slow-roll or cancel NVIDIA H20 orders. All while grilling NVIDIA over backdoor security rumours, even summoning Jensen Huang in July."

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208. GoodNightCoffee

Episode: ():""AGI,"",AI
Date: 2025-11-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's statements about the company's complete exit from the Chinese market due to U.S. export restrictions, highlighting the significant impact on NVIDIA's market share and revenue in China. Huang expresses deep regret about the situation and criticizes the U.S. policy restricting access to the Chinese market as a mistake for U.S. interests.
"NVIDIA has completely exited the Chinese market due to U.S. export restrictions. He described the current situation as back to zero and expressed deep regret. NVIDIA's share in China's high-end AI chip market, which once reached as high as 95%, has now plummeted to zero."

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209. Robotics Industry Insider: AI & Automation News

Episode: Robots on Rent and Why Your Factory Job Might Get a Metal Coworker Soon
Date: 2026-01-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's view that the 'chat GPT moment' for physical AI has arrived, marking a pivotal shift for NVIDIA-backed AI-driven robotics moving from labs into commercial manufacturing applications. It highlights the rise of robots as a service and supply chain-driven automation trends in manufacturing, underscoring NVIDIA's role in enabling these advancements.

"NVIDIA's Jensen Huang declared that the chat GPT moment for physical AI has arrived, marking an inflection point where breakthroughs in how robots understand the real world and reason about actions are moving from research labs into real-world production."

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210. Digimasters Shorts

Episode: Digimasters Shorts - AI Disrupts Markets, DeepSeek vs Silicon Valley, Elon Musk and Zuckerberg AI Crosswalk Hacks, Nvidia's US Manufacturing Shift, OpenAI's Screenless Phone Revolution
Date: 2025-04-16 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic shift to manufacturing AI chips and supercomputers domestically in the US, emphasizing supply chain resiliency and significant investment in AI infrastructure. It highlights CEO Jensen Huang's remarks on the importance of a US-based supply chain amid geopolitical tensions and outlines challenges such as tariff uncertainties and skills shortages.

"NVIDIA's CEO, Jensen Huang, emphasized the importance of a US-based supply chain to meet growing AI demand and strengthen supply chain resiliency."

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211. Beijing Bytes: US-China Tech War Updates

Episode: Nvidia's Chip Gymnastics, Cyber Freakouts & the Xi-Trump Tango
Date: 2025-07-11 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses the impact of US export restrictions on Nvidia's China sales, the resulting market share loss, and Nvidia's strategic response with a compliant AI chip to regain business. It also covers the broader geopolitical context affecting Nvidia's supply chain and market positioning.

"Nvidia, led by Jensen Huang, lost $8 billion in potential sales, and saw their China market share halved overnight. But here's the twist. Nvidia's global AI dominance made its stock skyrocket anyway."

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212. GoodNightCoffee

Episode: ():,XAI,
Date: 2025-12-27 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's potential acquisition of AI chip startup Grok for approximately $140 billion and its ongoing restructuring of the cloud services division, indicating a strategic withdrawal from direct cloud competition. It also covers Jensen Huang's historical M&A strategy focused on critical technologies and market access, but lacks official confirmation or detailed insider commentary.

"Founder and CEO Jensen Huang typically focuses his M&A strategy on acquiring critical technologies, top-tier talent, and access to high-growth markets, with the goal of reinforcing NVIDIA's overall computing ecosystem and core competitiveness."

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213. AI News

Episode: HPE and NVIDIA's "AI Factory" Stack: A Blueprint for Enterprise AI at Scale
Date: 2025-06-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the collaboration between HPE and NVIDIA to launch an 'AI Factory' stack that provides an integrated, turnkey AI data center solution for enterprises, highlighting NVIDIA's hardware and software contributions to simplify and scale AI adoption on-premises.

"HPE and NVIDIA have assembled a full package of hardware and software that companies can use to run AI applications. It's like getting all the pieces of a complex machine, already optimized and ready to go so you don't need to build a platform from scratch."

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214. GoodNightCoffee

Episode: ():AI,AI,Gemini
Date: 2025-10-31 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's significant stock surge following strategic initiatives and product launches by CEO Jensen Huang, highlighting new AI chip orders, a partnership with Nokia, and plans to build AI supercomputers for the U.S. Department of Energy, underscoring NVIDIA's leadership in AI and accelerated computing.

"NVIDIA's stock surged 3%, pushing its market capitalization past the $5 trillion mark for the first time, making it the first company globally to achieve this milestone, primarily attributed to a series of major strategic initiatives and new product launches announced by CEO Jensen Huang."

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215. Tech Threads: Sci-Tech, Future Tech & AI

Episode: Humanoid ROBOTS Unleashed: The FUTURE Is Now!
Date: 2025-07-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's strategic vision for humanoid robots addressing global labor shortages, emphasizing the immediate rollout of these robots to boost productivity and the global economy.

"He recently stood on stage at the Beijing Supply Chain Expo and, well, he didn't mince words. He delivered a clear message. The time for widespread humanoid robots is not eventually, not soon. And now."

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216. MRKT Matrix

Episode: Stocks Rise in Choppy Trading
Date: 2025-04-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast excerpt discusses Nvidia's strategic move to manufacture AI supercomputers entirely in the U.S., highlighting plans for new production facilities and the company's effort to strengthen supply chain resilience in response to trade tensions and tariffs. Jensen Huang emphasizes domestic production as key to meeting the growing AI demand.

"Nvidia's CEO, Jensen Huang, emphasized that domestic production will strengthen supply chain resilience and meet growing demand for AI technologies."

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217. The AI News Daily Brief

Episode: AI in Drug Discovery, Siri Enhancements, and Fusion Energy Innovations
Date: 2026-01-12 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's significant partnership with Eli Lilly to create a $1 billion AI co-innovation lab aimed at revolutionizing drug discovery and related pharmaceutical processes using NVIDIA's AI platforms and technology. Jensen Huang envisions using advanced AI and computing architectures to accelerate and scale the discovery and production of medicines.

"That's exactly what NVIDIA's CEO Jensen Huang envisions. By leveraging NVIDIA's BioNemo platform and Vera Rubin architecture, the lab will pioneer the use of physical artificial intelligence and robotics to accelerate and scale the discovery and production of medicines."

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218. TechCheck

Episode: Nvidia's Roadmap to Physical AI 3/19/25
Date: 2025-03-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's roadmap and vision for physical AI and robotics, highlighting Jensen Huang's enthusiasm about robots addressing worker shortages and physical AI's potential despite challenges. The discussion includes competitive positioning versus China's advances in robotics and insights from NVIDIA and other industry experts at the GTC conference.

"Robotics is one of the largest infrastructure opportunities. But the vision is clear, the timeline less so."

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219. Tech News Daily

Episode: Nvidia CEO Stresses China Chip Gap, Apple Unveils Budget iPhone, UK Cracks Down on Cyberflashing, ThreatBook Launches ATI, and more...
Date: 2025-09-29 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Nvidia CEO Jensen Huang discusses China's rapid advancements in semiconductor manufacturing and the competitive landscape involving major Chinese tech firms developing custom silicon, highlighting Nvidia's strategic responses amid geopolitical tensions and export restrictions.

"China is only nanoseconds behind the U.S. in the industry, and fostering technological growth through open competition benefits the global market."

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220. AI Daily

Episode: AI Innovations and Global Dynamics: Bridging Academia, Industry, and Policy
Date: 2025-11-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's warning about the US potentially falling behind China in AI technology advancement, emphasizing the need for better US innovation strategy and regulatory support for AI development. It also highlights the significant market opportunities for NVIDIA in China and the importance of consistent policies for AI chip demand growth.

"A striking statement from NVIDIA's CEO, Jensen Huang, places us at a pivotal juncture in the international AI race. Huang has issued a cautionary note that the US may be falling behind China in advancing AI technology."

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221. Nvidia Stock News Tracker - Daily

Episode: NVIDIA's Bullish Outlook Amid AI Dominance and Potential Setbacks
Date: 2026-02-05 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's recent stock performance, its strategic partnership with OpenAI, and analyst price targets reflecting both bullish optimism due to AI dominance and potential bearish risks. CEO Jensen Huang dismisses tensions in partnerships while supply chain improvements from easing China trade are noted.
"Chief Executive Officer Jensen Huang dismissed partnership tensions as nonsense."

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222. AI News Daily

Episode: Silverer Targets AI Deepfakes, AI Attack Exposes Encrypted Traffic, Nvidia Drives AI Gold, Apple Taps Google for Siri Upgrade, and more...
Date: 2025-11-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's central role in the AI boom, highlighting its dominant GPU market position, strong growth figures, and significant customer orders for upcoming GPU models, reflecting robust demand and future revenue potential.
"CEO Jensen Huang cited roughly $500 billion in customer orders for Blackwell and Rubin GPUs through 2026, signaling strong near-term demand and revenue potential."

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223. Digimasters Shorts

Episode: Digimasters Shorts - AI Cheating in UK Universities, Elon Musk Warns AI Could Destroy White-Collar Jobs
Date: 2025-06-17 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's perspective on AI chip export restrictions and their impact on global innovation and competition, highlighting concerns about China's advancing AI capabilities and supply chain dynamics. Huang warns that limiting access to AI technology might accelerate China's progress, potentially shifting the competitive landscape.
"NVIDIA CEO Jensen Huang argues that limiting access to AI technology could accelerate China's own advancements, potentially intensifying the AI race."

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224. Bedell Frazier Investment Counselling

Episode: Digital Dominance
Date: 2025-05-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's pivotal role in the AI digital arms race, highlighting its strong Q1 revenue growth despite China trade restrictions and the strategic challenges posed by the China embargo on advanced semiconductor sales. CEO Jensen Huang's remarks on robust global AI demand and the company's efforts to offset Chinese market losses through Middle East investments are noted.
"CEO Jensen Huang said global demand for AI infrastructure remains strong."

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225. AI Daily

Episode: Navigating AI's Future: Nvidia's Political Dialogues & PaXini's Robotics Revolution
Date: 2025-12-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's CEO Jensen Huang's recent political dialogues, focusing on the challenges of balancing AI technological advancement with national security concerns amidst changing US export controls, particularly regarding sales to China. The conversation highlights tensions between maintaining global competitiveness and addressing geopolitical risks.
"A key topic of debate is Huang's position on export controls, where the tension is evident. On one side, there's a push to maintain American companies like Nvidia at the cutting edge of AI technology by promoting an open, competitive global market. On the flip side, there's the pressing worry about the national security risks of selling advanced AI chips to rival nations, especially China."

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226. CNBC's "Fast Money"

Episode: Fed Flying Blind Ahead Of Rate Decision... And A Homebuying Bummer 10/28/25
Date: 2025-10-28 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA's stock surged nearly 5% following its second GPU technology conference of the year, where CEO Jensen Huang announced partnerships with major companies and discussed the company's growth toward a $5 trillion market cap. The discussion highlights NVIDIA's strong market position and strategic moves in AI and related sectors.
"CNBC's Christina Parks Nevelis spoke with NVIDIA CEO Jensen Huang this afternoon, highlighting NVIDIA's monumental market cap approaching $5 trillion and its recent partnerships announced at the GTC event."

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227. Trumponomics

Episode: The Promise and Peril of Trump's Big AI Plan
Date: 2025-07-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Jensen Huang's response to the Trump administration's ban on NVIDIA's chip sales to China and his efforts to lobby for continued sales to maintain market presence and competition in AI technology. It also touches on the strategic importance of supply chain and research talent amidst US-China tensions.
"Jensen Huang has said something of, you know, 50% of all AI researchers are Chinese."

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228. The Hub with Wang Guan

Episode: NVIDIA's China bet unfolds
Date: 2025-07-03 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's strategy of launching the B30 GPU designed to circumvent US export restrictions to China, weighing its competitive challenges against rising Chinese AI chip competitors and the geopolitical implications in the US-China tech rivalry.
"The B30 GPU produced by NVIDIA is kind of compromise actions for this company to making a very tough decision during this very sensitive age, which means NVIDIA need to balance its market interest and their requirements from the U.S. government."

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229. Courtside Financial Podcast

Episode: NIO Alert: Xpeng's 3K TOPS Robotaxi Bomb & Nvidia's 100K Fleet
Date: 2025-11-08 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's announcement of the Drive AGX Hyperion 10 platform at GTC, highlighting Jensen Huang's statement that the tipping point for RoboTaxis has arrived and the impressive technical specs of the new hardware. It connects NVIDIA's advancements to their impact on the autonomous driving industry and competitors like NIO.
"Jensen Huang just declared that the tipping point for RoboTaxis has arrived. Not coming, not coming, not soon, but has arrived."

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230. AI Daily

Episode: AI Innovations: From Open-Source Breakthroughs to Global Collaboration
Date: 2025-03-20 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: Jensen Huang discusses the disruptive impact of the new DeepSeq R1 open-source AI reasoning model and its implications for NVIDIA's market value and AI infrastructure strategy, highlighting ongoing partnerships and future growth predictions in AI computing capital expenditures.
"Despite this initial disruption, Huang's address also emphasized NVIDIA's commitment to AI infrastructure, particularly in robotics and enterprise applications, and predicted that global computing capital expenditures could soar to a trillion dollars by the decade's end."

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231. Tech News Daily

Episode: DOJ Investigates Google Samsung Deal, Fujitsu and RIKEN Target 1000-Qubit Computer, NVIDIA Unveils Blackwell Ultra, Microsoft Enforces Strict Performance Policies, and more...
Date: 2025-04-23 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast segment discusses NVIDIA's strategic shift towards AI technology highlighted in Jensen Huang's GTC 2025 keynote, including the launch of the Blackwell Ultra AI platform with significant performance improvements. It also touches on NVIDIA's competitive positioning against AMD and new AI deployment tools.
"CEO Jensen Huang took center stage, reiterating the company's confidence in its vision and spotlighting the AI omniverse, while continuing themes from previous years."

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232. Squawk on the Street

Episode: Nvidia's GTC Takeaways, Trump vs. FTC, Fed Decision on Deck 3/19/25
Date: 2025-03-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's AI strategy and market position, highlighting Jensen Huang's keynote at the GTC event, the company's strong demand outlook, and dispelling concerns about competition and gross margins. The discussion underscores NVIDIA's leading role and future roadmap in AI acceleration and chip supply.
"Very few people ever just say, listen, I've got a trillion dollar roadmap and it's happening sooner than you think."

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233. Opening Bid Unfiltered

Episode: Why Nvidia stock is still a must own
Date: 2025-03-24 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features B of A semiconductor analyst Vivek Arya discussing key takeaways from Nvidia's GTC event, highlighting Nvidia's outlined path to a trillion dollars of data center spending and the increasing computational demands of new reasoning AI models. The discussion touches on Nvidia's AI strategy and the significant growth opportunities in data center investments driven by advanced AI workloads.

"For the first time, NVIDIA actually outlined a path towards a trillion dollars of data center spending over the next few years... that extra time to think results in computational demand can be 10 to 100 times more than what it is in traditional large language models."

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234. Drak Spartan Podcast

Episode: El Flush : NVIDIA 6090 desde cero, Microsoft se rinde a los indies y el Multi Frame que nos clavan
Date: 2025-09-29 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's new DLSS4 technology and its AI-powered frame generation capabilities, highlighting its integration with over 100 games and applications as a significant technological advancement improving performance without heavily taxing GPUs. The commentary underscores NVIDIA's strategic leadership in AI-driven graphics innovations within the gaming market.

"Por que NVIDIA viene con su proxima ronda de magia negra? Ahora si, el DLSS ya no es truco Es predestigitacion con inteligencia artificial... DLSS4 mas Multiframe Generation Es basicamente decirle al hardware Oye, no trabajes tanto que yo hago unos frames extra con magia."

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235. The Elon Musk Update

Episode: Apple, Intel, Nvidia, and the AI Race
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic $5 billion investment in Intel, leading to collaboration on future AI chips and data center technology, positioning NVIDIA strongly against competitors in the AI hardware race. It highlights NVIDIA's dominance following a record-breaking quarter and a transformative partnership that could reshape the AI hardware market.

"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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236. Open AI

Episode: Apple's AI Plans and Nvidia's GPU Empire
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent $5 billion strategic investment in Intel, detailing a collaborative plan to co-develop AI chips that integrate Intel CPUs with NVIDIA GPUs, highlighting NVIDIA's move to consolidate AI hardware dominance and fend off competition from AMD.

"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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237. Geek Forever's Podcast

Episode: Magnificent 7?   AI | Geek Daily EP335
Date: 2025-09-29 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the role of NVIDIA as a dominant player in the AI chip market, highlighting its leadership with powerful GPUs like H100 and Blackwell, as well as the strong CUDA software ecosystem that creates high switching costs for developers. It positions NVIDIA as a key beneficiary in the AI investment landscape and technological innovation.

"NVIDIA is like the gold seller in the AI rush; everyone building AI and language models needs to buy GPUs from NVIDIA, whether it's the legendary H100 or the more powerful Blackwell, combined with the robust CUDA ecosystem that developers can't easily leave."

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238. Up First AI

Episode: 10 AI Announcements Shaping the Market
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's significant $5 billion investment in Intel, marking a strategic partnership for co-developing AI data center and PC chips. This move is described as a major power play to solidify NVIDIA's dominance in the AI chip market ahead of competition from AMD while also supporting Intel's AI infrastructure efforts.

"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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239. Breaking Analysis with Dave Vellante

Episode: Intel - NVIDIA: The Baton Pass to the CUDA Era
Date: 2025-09-20 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: This episode of Breaking Analysis discusses the strategic partnership between Intel and NVIDIA, emphasizing NVIDIA's dominance in AI computing through its CUDA platform and the positive economic impact this collaboration is expected to have on both companies and the x86 ecosystem. The analysis highlights NVIDIA's expanding total addressable market (TAM) and its influence on AI momentum in PCs and data centers.

"Just as Intel had a lock on the market in the 80s and the 90s, NVIDIA has now extended its moat deep into the x86 ecosystem in both PCs and data center. And it's expanded its TAM, by our estimates, from 500 billion to a trillion more."

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240. LLM

Episode: Nvidia, Apple, Intel: Shaping AI's Next Era
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent strategic partnership with Intel, highlighting NVIDIA's significant $5 billion investment in Intel and their collaboration on AI chip development, which positions NVIDIA strongly in the AI hardware market. It also contrasts NVIDIA's success with Intel's struggles and notes NVIDIA's dominance and survival strategy against AMD.

"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it. 4% of Intel instantly becoming one of Intel's largest shareholders. But it's not just about the money. This is about survival in the AI chip board."

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241. Tech&Co, la quotidienne

Episode: Donald Trump autorise Nvidia a vendre en Chine - 09/12
Date: 2025-12-09 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the U.S. administration authorizing Nvidia to export high-end chips to China, highlighting the strategic importance for Nvidia to maintain access to the Chinese market amid competition concerns. It covers details about the chip's performance, the economic terms of the deal, and insights from experts on the impact of this decision.

"La puce H200, six fois plus performante que le modele precedent d'Nvidia, peut a nouveau etre exportee vers le marche chinois."

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242. The Circuit

Episode: EP 135: INTEL AND NVIDIA!! Meta Connect and Ray Ban Display, Watch Huawei/China
Date: 2025-09-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses a significant collaboration between NVIDIA and Intel involving a $5 billion stock purchase by NVIDIA, joint CPU-GPU system design for data centers and PCs, and Intel licensing NVLink Fusion technology. Hosts analyze Jensen Huang's positive remarks about Intel in this context, highlighting strategic implications for NVIDIA's AI and computing capabilities.

""NVIDIA announced that it was doing a deal with Intel. They're buying $5 billion of Intel stock, and they're going to jointly design a CPU-GPU system for data centers and a CPU-GPU combo chiplet for PCs.""

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243. Haftalk Gundem Degerlendirmesi

Episode: Haftalk Gundem Degerlendirmesi #768
Date: 2026-01-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Jensen Huang's comments urging a positive outlook on AI, Nvidia's AI technology partnership with Eli Lilly for a $1 billion research center, and rumors about Nvidia potentially reducing GPU shipments, which the company partially denies. It touches on Nvidia's AI strategy, supply chain concerns, and collaborations within the AI and pharmaceutical sectors.

"Envidya baskan Jensen Huang dedi ki, herkes yapay zeka konusunda negatif olmay braksn... Bu olumsuz hava yasalara donusuyor. Polisi, politikalara, politikalar, uygulamalara donusuyor diyor. Bu kimsenin yararna degil."

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244. El Nexo Tecnologico

Episode: El rival se convierte en inversor: Nvidia invierte 5.000 millones de dolares en Intel para fabricar la CPU que asusta a AMD
Date: 2025-09-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's $5 billion investment in Intel to manufacture CPUs integrated with Nvidia GPUs as a strategic move against AMD, highlighting collaboration benefits and challenges in their supply chains and competition. The discussion outlines Nvidia and Intel's interdependence but notes Intel's current struggles and risks involved.

"El procesador que van a crear entre las dos, con CPU de Intel y GPU de Nvidia, puede poner en serios apuros a los procesadores Ryzen de AMD lideres del mercado."

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245. AI Convo Cast

Episode: Nvidia's Vera Rubin, Samsung's 800M AI Devices, and Intel's Panther Lake Chips
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's unveiling of the Vera Rubin AI supercomputer platform at CES 2026, highlighting its integrated design, improved performance, and cost efficiency. Jensen Huang framed this launch as pivotal for the era of agentic AI, emphasizing its role in autonomous AI agents requiring complex reasoning and rapid response.

"Rubin is built for the era of agentic AI."

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246. MRKT Matrix

Episode: The January Rally Continues
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast covers NVIDIA CEO Jensen Huang's keynote at the 2026 Consumer Electronics Show, highlighting NVIDIA's new AI products and strategies, positive analyst reactions, and growth prospects in AI, robotics, and autonomous vehicles. It also notes the impact of Huang's remarks on related tech stocks, emphasizing NVIDIA's role in AI chip demand and memory market dynamics.

"At the 2026 Consumer Electronics Show in Las Vegas, NVIDIA CEO Jensen Huang unveiled new AI products, including the Rubin platform, its next-generation chip architecture, and Alpamayo, an open-reasoning model family aimed at autonomous vehicle development."

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247. Masdividendos

Episode: Actualidad Semanal +D. Semana 38/2025
Date: 2025-09-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's significant investment of $5 billion in Intel, highlighting it as a strategic move to rejuvenate Intel's position and foster co-development of customized CPUs and chips optimized to work with NVIDIA's GPUs. This alliance is portrayed as a game-changing event in the semiconductor industry, reinforcing NVIDIA's leadership in AI and reshaping the competitive map.

"Envidia, el indiscutible emperador de la era de la inteligencia artificial, la compania cuyo nombre se pronuncia en susurros reverentes en todas las salas de juntas del planeta, ha anunciado una inversion de 5.000 millones de dolares en Intel."

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248. Albany News Today | 2 Min News | The Daily News Now!

Episode: AI Robots & Star Wars Toys Steal CES 2026 Show
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang showcased several AI innovations at CES 2026, including physical AI models trained in virtual worlds, the Cosmos simulation model, Apple Mayo for self-driving cars, and the next-generation Vera Rubin Superchip, alongside a strategic partnership with Siemens to maintain AI competitiveness. The segment highlights NVIDIA's technological advancements and product unveilings, positioning the company as a leader in AI at the event.

"NVIDIA CEO Jensen Huang unveiled physical AI, training models in virtual worlds with real physics before deploying them as machines."

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249. Tech News Daily

Episode: Kojima Productions Celebrates Anniversary, UAE Launches $200B AI Data Hub, Phasecraft Advances Quantum Hardware, Apple Expands iPhone Radiation Fix, and more...
Date: 2025-09-03 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's critical role in the UAE's $200 billion AI data hub project, highlighting the use of NVIDIA's Grace Blackwell GB300 systems in the initial Stargate phase. It also covers competitive dynamics and supply chain diversification efforts by G42, as well as Jensen Huang's confirmation of continued chip supplies despite geopolitical tensions.

"Despite geopolitical tensions, NVIDIA's CEO Jensen Huang confirmed ongoing chip supplies to Saudi Arabia's project in Chinese firms like Lenovo, illustrating complex international tech relations."

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250. Innovation by default

Episode: #127 - La fe del jugador y y el codigo que conquisto el mundo
Date: 2025-05-24 | Relevance: 90/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode provides a comprehensive narrative of Jensen Huang's background and NVIDIA's transformation from a gaming graphics card company to a key player in the AI revolution, emphasizing leadership and strategic vision behind the company's evolution.

"Jensen Juan... has a strategic vision that allowed him to see before anyone else that artificial intelligence would not be built with new ideas, but with new processors."

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251. Stay ahead of the markets with Swissquote

Episode: Holy Nvidia!
Date: 2025-09-23 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's announcement to invest $100 billion in OpenAI to help build AI data centers using Nvidia's chips, emphasizing the scale and strategic benefits of the investment, including Nvidia gaining a stake in OpenAI and boosting chip sales. The commentary highlights Nvidia's ability to collaborate with major partners and maintain strong market performance amid geopolitical challenges.

"Basically Nvidia will invest 100 billion US dollars in OpenAI so that OpenAI can buy Nvidia's chips to build massive data centers. It is a genius move to be honest with you."

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252. Big Take

Episode: Can Nvidia Stay on Top?
Date: 2025-03-14 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses Nvidia's transition from a video game chip maker to a dominant AI chip provider, highlighting its strong market position amid massive AI investments by major tech companies. It also addresses emerging competition, such as the Chinese startup DeepSeek, which challenges Nvidia's dominance by offering more resource-efficient AI models, thereby posing risks to Nvidia's market leadership.

""Nvidia isn't a funny place because on the one hand it is in a great position. It's very good at making these chips that everyone wants. Microsoft, Meta, Amazon, pretty much all the big tech companies have collectively announced hundreds of billions of dollars of investment in AI. And much of that investment will go straight to buying Nvidia's product.""

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253. Marketplace All-in-One

Episode: Nvidia: Boom or bubble?
Date: 2025-10-29 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's significant role in driving the AI boom through extensive investments in AI-related companies, highlighting both positive views on its ecosystem-building efforts and concerns about potential overreach leading to a bubble.

"Analyst Stacey Rasgon at Bernstein Research says NVIDIA is making so much money, it basically just has piles of billions of dollars sitting around. So why not use that cash to grow and support the ecosystem of users and applications and everything else to help ensure that there is a flywheel here, that there is widespread adoption?"

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254. Bloomberg Daybreak: US Edition

Episode: Instant Reaction: Nvidia Gives Solid Forecast, Despite China Concerns
Date: 2025-05-29 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent financial results, noting strong revenue performance despite losses in China and increased demand from enterprise customers, particularly driven by AI model token generation linked to ChatGPT. It highlights Nvidia's critical role in supplying compute for large language models, suggesting robust growth prospects.

"If ChatGPT needs to serve more users, they need additional compute. The traditional CPU compute is just not good enough. And that's where I think they are finding that additional demand."

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255. FLASH DIARIO de El Siglo 21 es Hoy

Episode: El chip de Nvidia que quedo atrapado entre dos potencias
Date: 2026-01-19 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the recent approval and subsequent halt of NVIDIA's H200 AI chip exports to China, highlighting geopolitical tensions and supply chain uncertainties affecting NVIDIA. It covers the US government's initial authorization followed by unofficial blocks at customs, reflecting complexities impacting NVIDIA's AI hardware sales in a critical market.

"El chip H200 de Nvidia es uno de los procesadores de inteligencia artificial mas potentes del mundo, utilizado en centros de datos y en entrenamiento de modelos de inteligencia artificial."

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256. Bloomberg Surveillance

Episode: Instant Reaction: Nvidia Delivers Solid Earnings
Date: 2025-02-26 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's strong financial performance with focus on its data center revenue and production ramp-up of Blackwell AI chips, highlighting an optimistic outlook for the next quarter and robust demand driving stock gains.

""The company saying that it ramped up massive scale production of Blackwell AI... demand for Blackwell is amazing.""

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257. Good Revenue News

Episode: Did We Just Lose the AI Race to China?
Date: 2025-12-14 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the U.S. decision to allow NVIDIA to sell its advanced AI chip (H200) to China, highlighting the strategic implications for the AI race, national security concerns, and the competitive landscape between the U.S. and China in AI chip technology.

"They've decided to let NVIDIA sell its second most powerful chip. It's called the H200. To China, to a vetted group of customers."

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258. Raleigh News Today | 2 Min News | The Daily News Now!

Episode: Nvidia Faces Market Shifts as Meta, Google, Baidu Emerge
Date: 2025-11-30 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's strong market position in AI chips but highlights emerging competition from Meta, Google, and Baidu, emphasizing challenges to Nvidia's dominance due to shifts in supplier preferences and export limitations impacting China. It outlines strategic moves by major tech companies to diversify away from Nvidia's chips and potential market fragmentation.

"Nvidia still holds a large share of the market, estimated between 80 and 95 percent, but the emergence of strong competitors and strategic shifts by major tech players suggest more fragmented future."

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259. TechDaily.ai

Episode: Nvidia Acquires CentML: Speed, Efficiency & the Future of AI
Date: 2025-07-07 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the acquisition of CentML by NVIDIA, highlighting how their AI deployment platform optimizes model performance and cost efficiency across various hardware, including NVIDIA's own GPUs. It emphasizes significant performance speedups, automation, and the benefits of an open-source approach in AI infrastructure.

"The CentML platform basically let developers pick pretty much any open model they liked...and then point it at whatever hardware they had. Could be NVIDIA H100s, could be AMD's MI300Xs, even Google's TPUs."

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260. News in a Nutshell

Episode: Japan's Semiconductor Strategy, Pope's Human Rights Warning, and Nvidia's Tech Shift
Date: 2026-01-11 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's new sales term changes for its H200 AI chips targeting Chinese customers as a response to geopolitical tensions and regulatory uncertainty, reflecting challenges, including a previous $5.5 billion inventory write-down under the Trump administration. It highlights NVIDIA's strategic adjustments amidst U.S.-China tech relations.

"On January 11, 2026, NVIDIA announced a significant tightening of its sales terms for H200 AI chips to Chinese customers, now requiring full upfront payment."

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261. The FreightFA Brief Podcast

Episode: Dec 26: Space Data Centers, The Supply Chain Modal No One's Planning For
Date: 2025-12-26 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's involvement in space-based AI data centers, highlighting the use of NVIDIA H100 and upcoming Blackwell GPUs in StarCloud's orbital AI training infrastructure. It emphasizes NVIDIA's role in the future of AI computing and supply chain implications related to satellite launches and heavy lift rocket capacities.

"They launched their first operational satellite, StarCloud 1, November 2nd, 2025. And it had an NVIDIA H100 GPU in it. Already training AI models in orbit. The next satellite, StarCloud 2, deploys in October 2026 with those NVIDIA Blackwell chips."

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262. VSA Capital

Episode: VSA Capital Tech & Transitional Energy 290525
Date: 2025-05-29 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's strong sales forecast, with Q1 revenue up 67% and expectations of continued growth despite export restrictions, highlighting increased production of Blackwell chips and efforts to speed up AI deployment. The CEO's appeal to the US government to lift production restrictions for China is also covered.

"Nvidia delivered a solid sales forecast saying that AI computing is still poised for exceptional growth."

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263. Nvidia Stock News Tracker - Daily

Episode: Nvidia's AI Dominance Fuels Bullish Forecasts Amid Tech Volatility
Date: 2025-07-09 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's strong market position, bullish analyst outlooks due to its central role in AI infrastructure and compute solutions, and stable financial health amid tech sector volatility. It highlights price targets, trading volume, and upcoming product cycles like the Blackwell graphics architecture contributing to growth.

"Citi recently raised its price target to US$190, citing Nvidia's central role in artificial intelligence infrastructure and networking, alongside robust sovereign and enterprise demand for advanced compute solutions."

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264. Nvidia Stock News Tracker - Daily

Episode: Nvidia's AI Dominance Faces Caution Signals as Stock Nears All-Time High
Date: 2025-07-24 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's stock nearing its all-time high with strong revenue growth largely driven by AI chip demand and data center solutions. It notes investor optimism, positive analyst ratings, and recent insider selling, with some caution signals in trading volume.

"Nvidia maintains its role as the primary provider of compute for artificial intelligence, with industry dominance securing it a consistent premium valuation."

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265. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: Is o3 Functionally AGI?
Date: 2025-04-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses recent U.S. export controls affecting NVIDIA's H20 chips, the company's significant write-down related to inventory with limited demand outside China, and CEO Jensen Huang's lobbying efforts against these controls which were reportedly reversed by former President Trump. The discussion highlights the impact of export restrictions on NVIDIA's business and China's AI development costs.

"NVIDIA had been outspoken about existing export controls and lobbied against them going further. In January, as Biden's outgoing team imposed the last round of tightening, the company said that export controls, "will only harm the U.S. economy, set America back, and play into the hands of U.S. adversaries.""

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266. Enterprising Investor

Episode: Winston Ma, CFA: Sovereign Wealth, AI Strategy, and the Future of Global Capital
Date: 2025-10-01 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the strategic relationship between NVIDIA and Intel, highlighting U.S. government involvement in supporting Intel's manufacturing capabilities and NVIDIA's investment in Intel to collaborate on advanced AI chip design and manufacturing. It covers NVIDIA's role in the AI chip supply chain and the impact of government policies on the industry.

"Today, what we see in the press release is that Intel will design and manufacture advanced AI chips with NVIDIA. Plus, NVIDIA will invest $5 billion into Intel."

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267. The Quantum Stack Weekly

Episode: Quantum Leaps: IonQ's Acquisition, D-Wave's Supremacy, and NVIDIA's Hybrid Breakthroughs | The Quantum Stack Weekly
Date: 2025-06-10 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's role in quantum-classical hybrid computing solutions, highlighting Jensen Huang's participation at GTC 2025 where he showcased practical AI and quantum breakthroughs with industry leaders, including significant speed-ups in pharmaceutical simulations. This reflects NVIDIA's leadership in integrating quantum technologies with classical AI to achieve transformative results.

"Meanwhile, at the GTC 2025 conference last week, we witnessed a watershed moment for quantum classical integration. NVIDIA's Jensen Huang shared the stage with leaders from IonQ, D-Wave, and Microsoft, showcasing hybrid solutions that are yielding practical results today, not in some theoretical future."

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268. Beijing Bytes: US-China Tech War Updates

Episode: Nvidia's Chip Gymnastics, Cyber Freakouts & the Xi-Trump Tango
Date: 2025-07-11 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses the impact of US export restrictions on Nvidia's sales to China, its market share decline, and the company's strategic response including release of a compliant AI chip for China. It also covers the broader geopolitical context affecting Nvidia's supply chain and competition, such as US-China tech tensions and potential diplomatic developments.

"In April, the Trump administration's rules kneecapped US chipmakers, effectively closing off $50 billion in Chinese sales. Nvidia, led by Jensen Huang, lost $8 billion in potential sales, and saw their China market share halved overnight."

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269. [KBS WORLD Radio] Korea 24

Episode: Korea 24 - 2025.10.31
Date: 2025-10-31 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia CEO Jensen Huang's visit to South Korea during the APEC summit, highlighting Nvidia's plans to deploy 260,000 GPUs in the country and collaborate with major Korean firms and the government to build large-scale AI computing centers. Huang praised South Korea's potential as an AI hub, citing its technology and human resources.

"Huang also touted South Korea's potential to become a major AI hub, citing its advanced technological infrastructure, software capabilities and human resources."

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270. The Bulwark

Episode: America's Losing the AI Race to China (with Matt Pottinger)
Date: 2025-08-10 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses U.S. export controls on NVIDIA's H20 chip, highlighting its importance in AI inference efficiency and the impact on China's AI capabilities, particularly regarding supply chain and competition.

"Now, President Trump in April took picked up where Biden had picked up from Trump himself and deepened those export controls even further by cutting off Beijing's access to a chip made by NVIDIA Corp... the H20 is very good at allowing existing models to become much more energy efficient, much faster, better reasoning."

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271. Stay ahead of the markets with Swissquote

Episode: When 'amazing' is not enough... | MarketTalk: What's up today? | Swissquote
Date: 2025-02-27 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong quarterly earnings driven by high sales of Blackwell chips and a significant revenue growth in the data centre segment, beating analyst expectations despite concerns about manufacturing costs. It highlights NVIDIA's consistent ability to surpass earnings and revenue forecasts since the AI buzz began in 2023.

"NVIDIA continues to do an amazing job, to say the least, in the first place and actually defies those expecting the company to make a mistake."

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272. Quantum Computing 101

Episode: Quantum GPUs: NVIDIA's NVQLink Fuses Classical Muscle and Quantum Weirdness
Date: 2026-01-05 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's new NVQLink technology, which integrates quantum processing units with GPUs, positioning NVIDIA at the forefront of quantum-classical hybrid computing. It highlights NVIDIA's role in advancing AI, supply chain innovation, and competitive positioning through collaborations (e.g., with Google) and cutting-edge hardware developments.

"The crown jewel is NVQLink. QPUs, those fragile quantum beasts, excelling at intractable simulations, now handshake seamlessly with NVIDIA GPUs via high-bandwidth links."

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273. Stay ahead of the markets with Swissquote

Episode: Holy Nvidia!
Date: 2025-09-23 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's strategic $100 billion investment in OpenAI to build AI infrastructure and data centers using Nvidia's chips, highlighting the significant scale and impact on Nvidia's growth and stock price. It emphasizes Nvidia's ability to form key partnerships, navigate geopolitical challenges, and maintain its leadership in AI technology.

"Basically Nvidia will invest 100 billion US dollars in OpenAI so that OpenAI can buy Nvidia's chips to build massive data centers. It is a genius move to be honest with you."

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274. The John Batchelor Show

Episode: Preview: PRC vs Nvidia. Colleague Chris Riegel of #ScalaReport on the CCP ambition to catch and pass Nvidia with Huawei. More later.
Date: 2025-08-14 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses how Chinese competitors like Huawei are trying and struggling to catch up to Nvidia's AI capabilities, with Nvidia maintaining a significant technology lead in AI chips. Analyst Chris Riegel emphasizes Nvidia's dominant position and innovation edge over Chinese competitors and others in the market.

"Nvidia is the equivalent of the 1990s Chicago Bulls. No one can touch them if they're on their game."

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275. The Silicon Insider

Episode: Nvidia GTC 2025, Tariffs & Layoffs
Date: 2025-03-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's GTC 2025 event and CEO Jensen Huang's vision for AI's future, including the introduction of a new AI chip and the concept of 'physical AI' integrating AI with robotics and autonomous systems. The commentary highlights the significance of NVIDIA's developments and Huang's strategic outlook as critical for leadership in AI in the coming years.

"He brought robots out on stage with him. He talked about AI and robotics. He talked about AI and autonomous vehicles. And just the idea that AI will be running, not just software on the back end of these chips, but actually acting on the physical world."

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276. Practical: AI & Business News

Episode: Nvidia Pushes "Sovereign AI" - Europe Buys the Pitch
Date: 2025-10-03 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's strategic push to position itself as a partner to Europe in developing 'sovereign AI,' highlighting the company's influence in the AI chip market and Europe's interest in reducing dependence on US and Chinese tech. The discussion also notes Nvidia's significant market valuation driven by global demand for its GPUs and the current geopolitical dynamics affecting AI deployment.

"Nvidia is worth over $2 trillion today, driven almost entirely by the global hunger for GPUs to train and run AI models."

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277. Washington AI Network with Tammy Haddad

Episode: 61: NVIDIA GTC DC: AI, Quantum, 6G, and Healthcare Innovation
Date: 2025-11-02 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode covers NVIDIA's announcement of the Aerial RAN computer, a specialized platform designed to accelerate wireless networks, particularly focusing on 6G technology. It highlights NVIDIA's collaboration with Nokia and the ability to simulate real-world network conditions for research and startup innovation.

"Yesterday, Jensen talked about two things. One is the availability of a new computer called the aerial research computer, aerial Rang computer, sorry, aerial Rang computer."

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278. AI HR

Episode: Nvidia Reenters Chinese Tech Market
Date: 2025-07-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of shipping its H20 AI chips to China after navigating U.S. regulatory restrictions, highlighting significant revenue implications and the background behind this development.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers, and the reason why they're back on track is also quite a crazy story."

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279. Bloomberg Surveillance

Episode: Instant Reaction: Nvidia Gives Solid Forecast, Despite China Concerns
Date: 2025-05-28 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's solid financial performance despite setbacks from China, highlighting strong AI-related demand driven by technologies like ChatGPT that require significant compute power, which benefits NVIDIA. Analysts note impressive revenue figures and growth expectations, although some caution remains about semiconductor cyclical trends.

"The way these AI models work is if you type in a query on ChatGPT, it's going to generate, you know, hundreds of tokens from that... That's what's resulting in the 10x increase in tokens... I'm not surprised that everyone needs additional compute because if ChatGPT needs to serve more users, they need additional compute."

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280. The Last Invention is AI

Episode: Nvidia Reenters Chinese Tech Market
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's ability to restart shipping their H20 AI chips to China after regulatory restrictions were eased, highlighting the significant revenue impact and the background story behind this development.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, which is going to add billions of dollars to Nvidia's overall revenue."

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281. Bloomberg Intelligence

Episode: Instant Reaction: Nvidia Gives Solid Forecast, Despite China Concerns
Date: 2025-05-28 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong revenue performance despite challenges in China and highlights increased demand for AI compute power, especially driven by token generation growth in AI models like ChatGPT. Analysts note NVIDIA's ability to offset revenue losses with other enterprise customers and the ongoing need for their GPUs over traditional CPUs.
"NVIDIA is exposed through ChatGPT because all the weekly active users that are going on ChatGPT and using the product... that's what's resulting in the 10X increase in tokens... they're finding that additional demand."

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282. Trends mit Teo: Kunstliche Intelligenz & Social Media

Episode: #605: NVIDIA meldet Rekordumsatz - und ubertrifft erneut die Erwartungen
Date: 2025-05-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's impressive quarterly results showing 70% year-over-year revenue growth, emphasizing that the growth is driven by real AI usage rather than speculative investment. The host highlights NVIDIA's role in building the infrastructure for mainstream AI applications and mentions anticipation around Jensen Huang's outlook commentary.
"Also Nvidia ist nicht KI, sondern die bauen die Schaufeln fur die ganze KI-Infrastruktur."

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283. Bloomberg Daybreak: Asia Edition

Episode: Nvidia Eases China Concerns With Upbeat Forecast
Date: 2025-05-29 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's latest earnings report and CEO Jensen Huang's comments on the impact of US export controls limiting sales in China. Despite challenges in the Chinese market, NVIDIA provides a solid revenue forecast, with analysts responding positively but noting ongoing uncertainties around China.
"The limitations are quite stringent, quite limited if you will. H20 is as far down as we could take a hopper. We don't know how to make it even less. And so that's really the limit."

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284. Infamous AI

Episode: Nvidia Reenters Chinese Tech Market
Date: 2025-10-13 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of shipping AI chips to China after regulatory hurdles, highlighting the significant revenue boost this will bring and providing background on the situation. It also briefly mentions an Nvidia AI model available on an AI platform.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

285.

Episode: NVIDIA
Date: 2025-12-11 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features a detailed discussion with Denis Timonin, a former NVIDIA AI solution architect, about the importance of NVIDIA graphics cards for modern neural networks, the company's leadership in the GPU market, and future innovation prospects. Additional bonus content delves deeper into AI industry trends and strong AI developments, reflecting positively on NVIDIA's role in driving AI hardware advancement.
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286. TEO Podcast: Kunstliche Intelligenz, Tech Trends & Aktien

Episode: #605: NVIDIA meldet Rekordumsatz - und ubertrifft erneut die Erwartungen
Date: 2025-05-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly results with 70% year-over-year growth driven by real AI usage rather than speculative investment, emphasizing NVIDIA's role in building the necessary infrastructure for mainstream AI applications.
"Nvidia ist nicht KI, sondern die bauen die Schaufeln fur die ganze KI-Infrastruktur."

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287. Rich On Tech AI

Episode: Back in Business: Nvidia and China
Date: 2025-07-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of chip shipments to China after regulatory restrictions, highlighting the significant revenue impact and the strategic background behind these developments.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers and the

reason why they're back on track is also quite a crazy story."

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288. Markt-Trends setzen mit Swissquote

Episode: NVIDIA baut Anteile an Xai aus | New York to Zurich Taglich
Date: 2025-10-08 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's increased investment in the AI startup Xai, highlighting significant financial rounds and confirming strong demand for NVIDIA's AI chips. It also touches upon the broader AI ecosystem including OpenAI and AMD, implying NVIDIA's growing monopolistic role in AI hardware.
"Der CEO betont ubrigens, dass die Nachfrage dementsprechend hoch bleiben wird."

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289. Strict Scrutiny

Episode: Nvidia Returns to China's AI Market
Date: 2025-09-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's ability to resume shipping AI chips to China after regulatory restrictions by the US, highlighting the potential significant revenue impact and the regulatory background behind the restrictions.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

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290. Hugging Face

Episode: Nvidia Returns to China's AI Market
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of shipments of H20 AI chips to China after regulatory hurdles, detailing the background of the US restrictions, what changed to allow sales to restart, and the significant revenue impact for Nvidia.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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291. San Jose News Today | 2 Min News | The Daily News Now!

Episode: Huawei, Nvidia, and Espionage: A Silicon Valley Mystery
Date: 2025-09-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a U.S. investigation into FutureWay, a Huawei subsidiary that shared buildings with Nvidia's headquarters, raising concerns about potential espionage affecting Nvidia's advanced semiconductor and AI technology. Nvidia has responded to these government concerns as the probe continues.
"The lawmakers expressed their worries that this co-location might have given FutureWay, and therefore Huawei, unusual access to some of America's most advanced semiconductor and artificial intelligence technology."

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292. Dagen med Di

Episode: Nvidia slar forvantningarna - aktien backar i efterhandeln
Date: 2025-02-27 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's recent earnings report which beat expectations, highlighting strong demand for next-generation AI processors (Blackwell), with data center sales making up 91% of revenue. It notes the slowing growth rate and the decline in gross margin due to more complex and costly product launches in data centers.
"Bolagets vd Jensen Huang lyfte bland annat fram att efterfragan pa nasta generations AI-processorer, Blackwell, ar fantastisk"

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293. The Political Scene | The New Yorker

Episode: Why the Tech Giant Nvidia Owns the Future
Date: 2025-04-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides an in-depth discussion about NVIDIA's dominant role in AI chip manufacturing, its significance to future technologies like ChatGPT, and its geopolitical importance related to U.S.-China competition. The conversation is framed around a profile of Jensen Huang and emphasizes NVIDIA's central position in the evolving AI ecosystem.
""Nvidia makes microchips. In fact, it's all but cornered the market on the chips that are essential for the use of AI, for artificial intelligence systems like ChatGPT.""

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294. The Political Scene | The New Yorker

Episode: Why the Tech Giant Nvidia Owns the Future
Date: 2025-04-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: This podcast episode discusses Nvidia's significant role in AI technology, highlighting its dominance in producing microchips essential for AI systems like ChatGPT and its critical position in shaping future technology, particularly in the context of US-China competition. It features commentary by a journalist familiar with Nvidia and its CEO Jensen Huang, providing an insightful overview although not featuring direct quotes from Huang himself.

""Nvidia makes microchips. In fact, it's all but cornered the market on the chips that are essential for the use of AI, for artificial intelligence systems like ChatGPT. And just recently, it was rated the most valuable company ever.""

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295. The AI Engineer Podcast

Episode: Nvidia Returns to China's AI Market
Date: 2025-10-13 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent ability to resume shipments of its H20 AI chips to China following regulatory hurdles, exploring the background and the significant revenue implications for Nvidia. It also briefly mentions Nvidia's AI models available on a third-party platform.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

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296. Ukad Si

Episode: Espresso US - Nvidia najwieksza spoka w historii - Eugeniusz Romer, Leszek Bukowski
Date: 2025-07-11 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's historic market capitalization surpassing $4 trillion, its leadership in AI processors, the ecosystem including CUDA software, and challenges such as US export restrictions to China and competition from lower-cost Chinese AI models.

""Nvidia to nie jest tylko najwiekszy na swiecie i najsprawniejszy producent procesorow, ukadow do trenowania sztucznej inteligencji, ale Nvidia to jest cay ekosystem, ktory by budowany przez kilkanascie ostatnich lat.""

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297. Upgrade AI

Episode: AI Chips Flow Again: Nvidia in China
Date: 2025-09-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of AI chip shipments to China after regulatory hurdles, the financial impact of this move, and background on the constraints faced. It also mentions Nvidia's AI model offerings like Numatron 70b as part of the broader AI ecosystem.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, which is going to add billions of dollars to Nvidia's overall revenue."

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298. Columbia Energy Exchange

Episode: Jensen Huang: The Power of Intelligence Infrastructure
Date: 2025-08-26 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses NVIDIA's AI strategy focusing on energy efficiency, sustainability, and innovative technologies like silicon photonics to reduce power consumption in data centers. He also shares his vision of AI factories aimed at reducing strain on the energy grid and enhancing industrial efficiency.

"There's no question that artificial intelligence is the most energy efficient way of doing computation. It is the most sustainable way of doing computation going forward."

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299. The John Batchelor Show

Episode: S8 Ep179: PREVIEW - Brandon Weichert - Jensen Huang and Nvidia's Geopolitical Influence. Weichert identifies Nvidia CEO Jensen Huang as potentially America's most consequential and strategically important technology tycoon, arguing he now surpasses Elon Musk in dir
Date: 2025-12-12 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features a discussion about NVIDIA CEO Jensen Huang's significant geopolitical influence, positioning him as a key figure shaping U.S. technology and national security strategy, especially in relation to China. Brandon Weichert highlights Huang's strategic importance surpassing even Elon Musk, emphasizing his influence on U.S.-China relations and his approach to avoiding conflict.

"I think that Jensen Huang, there's a direct link...I believe fully that Jensen Huang and his influence and his relationship with the president, I think this is having real impacts on how the current administration is viewing China."

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300. The DSR Network

Episode: AI, Energy and Climate: Jensen Huang: The Power of Intelligence Infrastructure.
Date: 2025-04-28 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features an in-depth conversation with Jensen Huang, NVIDIA's founder and CEO, discussing the company's AI strategy, potential benefits of AI for energy and climate, and NVIDIA's role in advancing AI technology. The discussion highlights NVIDIA's innovation leadership and Huang's vision for AI's impact on the energy sector.
"Jensen Huang says that NVIDIA is a company built on innovation, and his annual GTC speech is widely anticipated by AI developers and business people for insights into AI advancements."

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301. Indicast - All Podcasts

Episode: Stephen Witt on the cult of Nvidia and its charismatic founder, Jensen Huang
Date: 2025-06-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode features journalist Stephen Witt discussing his experiences interviewing Jensen Huang, highlighting Huang's unique and open communication style and his approach to thinking from first principles, giving insights into his leadership and NVIDIA's innovative culture.
""Jensen is not that way. He's totally open. You do not know where the direction of the conversation is going to go.""

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302. Hashtag Trending

Episode: NVIDIA CEO Jensen Huang UNLEASHED: Hashtag Trending For March 20, 2025
Date: 2025-03-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA CEO Jensen Huang's candid speech at the GTC conference outlining the company's AI strategy, emphasizing the underestimated compute needs for AI, a new focus on quantum computing, and NVIDIA's upcoming Blackwell and Rubin GPU architectures designed to boost AI performance.
"NVIDIA CEO Jensen Huang said that he was going off teleprompter, and he meant it. He delivered a speech at NVIDIA's GTC conference that was more frank and perhaps more controversial than we might be used to."

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303. The Atlantic Out Loud

Episode: The New King of Tech
Date: 2025-04-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's evolution from a graphics card maker to a pivotal provider of GPUs for AI large language models, highlighting its major role in the AI chip market and its high market valuation. It contextualizes NVIDIA's significance amidst growing competition in AI models and mentions its lucrative position in supplying essential hardware for AI development.
"The competition among LLMs may be hard to keep track of, but for NVIDIA, the company that designs the computer chips or graphics processing units, GPUs, that many of these large language models have been trained on, it's also enormously lucrative."

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304. The Journal.

Episode: The Nvidia CEO's Quest to Sell Chips in China
Date: 2025-08-18 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's evolving role in lobbying amid the complex U.S.-China trade tensions, highlighting NVIDIA's critical position in AI technology and the company's navigation of geopolitical challenges.
"Huang is a diplomat of sorts trying to navigate the very complex relationship between the U.S. and China."

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305. Motley Fool Money

Episode: Inside Nvidia's "Thinking Machine"
Date: 2025-04-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast features a conversation with Stephen Witt, author of a book on NVIDIA and Jensen Huang, discussing NVIDIA's AI strategy, the current capital expenditure cycle, and the potential for significant market cap growth. It includes insights into Jensen Huang's approach to AI development and market competition.
"Jensen's hardware platform, Jensen is not going to build the next version of GPT. He doesn't, he'll build one internally just to test it, but he's not attempting to compete directly with OpenAI."

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306. All-In with Chamath, Jason, Sacks & Friedberg

Episode: Winning the AI Race Part 3: Jensen Huang, Lisa Su, James Litinsky, Chase Lochmiller
Date: 2025-07-23 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses the transformative potential of AI and highlights NVIDIA's strategic focus on being ahead in technology to thrive, emphasizing long-term investments in AI and learning from industry lessons.

"As a CEO, we have to be paranoid every single day, right? So we don't rely on the past, but I think there are lessons of the past. And I think probably the most important lesson that I can say for technology is you have to shoot ahead of the duck."

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307. TEO Podcast: Kunstliche Intelligenz, Tech Trends & Aktien

Episode: #611: NVIDIA GTC Recap & Interview mit Timo Kistner uber AI, Manufacturing & Robotics
Date: 2025-07-02 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode covers the NVIDIA CEO Jensen Huang's European tour, including his keynote at the GTC Paris conference, discussions on AI use cases in industrial manufacturing, and potential AI infrastructure expansion deals in Germany. The mention highlights NVIDIA's strategic positioning in AI and partnerships in Europe.
"You know, the GTC conference normally happens in the US where Jensen Huang presents the latest AI trends in his keynote, and now he's been on a Europe tour, including Germany, to negotiate a new AI deal likely expanding data centers."

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308. pplpod

Episode: Jensanity: From Cleaning Toilets to Architect of the AI Revolution
Date: 2026-01-05 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: This podcast episode provides an in-depth discussion of Jensen Huang's journey and NVIDIA's rise to a $5 trillion market cap, highlighting the company's pivotal role in the global AI boom and technological transformation. It outlines Huang's leadership since 1993, NVIDIA's financial milestones, and his personal wealth, painting a picture of the company's profound impact on AI and GPU production.
"NVIDIA The company Huang co-founded became the first company in history to reach a $5 trillion market cap. That was October 2025. And this isn't just a financial milestone, right? This is a technological marker."

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309. Future Ready Leadership With Jacob Morgan

Episode: Job Predictions Collide, RTO Tightens, Workweeks Shift, and Consulting Gets Rebuilt
Date: 2025-12-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's optimistic perspective on AI's impact on jobs, highlighting NVIDIA's evolving role in AI and predicting new industries emerging with AI integration. Huang pushes back against fears of AI-driven job losses, emphasizing augmentation rather than elimination of roles.
"Jensen Huang argued that while AI will automate many tasks, it won't eliminate most jobs. The example that he used is radiologists, where AI assists but does not replace the job."

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310. The New Yorker Radio Hour

Episode: The Company Behind the A.I. Boom
Date: 2025-12-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's crucial role in the AI boom, focusing on its pioneering hardware innovations, specifically the development of parallel computing chips that enabled AI neural networks to function effectively. It also touches on NVIDIA's market dominance and strategic importance in the tech race between the US and China.
"Virtually all of them are using chips built by the tech colossus NVIDIA. The company has nearly cornered the market on the hardware that runs much of A.I."

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311. Beginner's Mind

Episode: #163: The NVIDIA Way - 7 Scaling Lessons from Jensen Huang's Playbook
Date: 2025-09-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode reviews the book 'The NVIDIA Way' by Tai Kim, unpacking how Jensen Huang led NVIDIA through challenges by focusing on culture, vision, and resilience. It shares seven key lessons derived from NVIDIA's journey and leadership, emphasizing the company's strategic approach beyond just chip design.
""NVIDIA didn't just build chips. They built inevitabilities.""

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312. Good Morning Business

Episode: Culture IA : Jensen Huang, l'interview exceptionnelle - 13/06
Date: 2025-06-13 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang, NVIDIA's CEO, discusses the company's AI strategy in Europe, emphasizing partnerships such as the one with French startup Mistral.ai, highlighting the strength of French AI research and NVIDIA's plans to open data centers in Europe, particularly in France.
"Mistral is a promising French startup with excellent AI researchers who understand that beyond AI as a service, French customers want..."

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313. Bloomberg Tech

Episode: Nvidia CEO Slams US Chip Rules, Trump's AI Advisor Discusses Action Plan
Date: 2025-05-21 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: Nvidia CEO Jensen Wang criticizes US restrictions on AI chip sales to China, calling them a failure and urges the US government to lower trade barriers to accelerate AI development, highlighting the impact of regulations on Nvidia's business in the crucial Chinese semiconductor market.
"The US should maximize the speed of AI diffusion because if we don't, the competition will come."

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314. Squawk on the Street

Episode: SOTS 2nd Hour: EXCLUSIVE: Nvidia CEO, plus AI Expert Takeaways & Trump's Fired FTC Commissioner Fires Back 3/19/25
Date: 2025-03-19 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jim Cramer interviews Nvidia CEO Jensen Huang ahead of the company's analyst meeting, discussing AI demand and the company's future direction, highlighting Nvidia's significant role in technology and AI market growth.
"Our Jim Cramer sitting down with Nvidia CEO Jensen Huang, ahead of the company's analyst meeting today, talking everything from AI demand to the road ahead."

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315. The John Batchelor Show

Episode: HEADLINE: Nvidia's Strategic $5 Billion Investment in Intel Reshapes US Chip Industry GUEST NAME: Chris Riegel SUMMARY: Nvidia, led by Jensen Huang, invests $5 billion in Intel, gaining access to manufacturing capabilities while Intel gets crucial fundin
Date: 2025-09-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's strategic $5 billion investment in Intel, highlighting Jensen Huang's leadership and Nvidia's pivotal role in AI advancement through GPUs, particularly focusing on data centers and large language models. The conversation provides insights into Nvidia's evolution from gaming GPUs to essential AI hardware and the significance of this partnership in the US chip industry.
"NVIDIA these years later has become the thing you must have in order to compete at the level of moving towards what is called AGI, which is their language for better than human."

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316. Behind the Money

Episode: Business Book of the Year: Author Stephen Witt on Nvidia's rise
Date: 2025-12-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode features an interview with Stephen Witt, author of a detailed business book on NVIDIA and its CEO Jensen Huang, discussing the company's rise and the significance of its role in AI hardware. It explores the perspective of NVIDIA's founder and the industry backdrop around AI and hardware innovation.
"Just in your own words, tell us a little bit about the project that you undertook. Yeah, so it actually completely grew out of my own conviction that ChatGPT was going to replace me."

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317. Slate Business

Episode: What Next TBD | Trump Dips into NVIDIA's Chips
Date: 2025-08-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's strategic handling of export restrictions and trade negotiations with the U.S. government and China, highlighting his role in securing access to important chip markets through an agreement involving a share of chip sales to the U.S. government. It also touches upon NVIDIA's critical position in the AI chip market and the challenges they face globally.
"After pressing the Trump administration for months to allow NVIDIA to sell chips to China, Huang agreed to an eyebrow-raising deal. NVIDIA will give a sizable chunk of its chip sales to the U.S. government in exchange for the export licenses to sell them."

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318. What Next | Daily News and Analysis

Episode: TBD | Trump Dips into NVIDIA's Chips
Date: 2025-08-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's rising importance in the tech industry due to AI, Jensen Huang's strategic navigation of U.S.-China export restrictions, and his direct negotiation with the Trump administration to secure chip sales. It highlights Huang's role in balancing geopolitical pressures and maintaining NVIDIA's market position.
"After pressing the Trump administration for months to allow NVIDIA to sell chips to China, Huang agreed to an eyebrow-raising deal. NVIDIA will give a sizable chunk of its chip sales to the U.S. government in exchange for the export licenses to sell them."

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319. Podcast Canaltech

Episode: Como a NVIDIA virou peca-chave na disputa entre EUA e China
Date: 2025-08-13 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's critical role in the US-China technology tensions and highlights CEO Jensen Huang's influence and negotiation efforts to navigate export restrictions on AI chips. It also covers how Huang's cultural background and technical expertise aid his dealings with Chinese authorities amid complex geopolitical dynamics.

""Ele tem um background, uma origem tecnica, ao longo do tempo tem se mostrado um tremendo empreendedor, executivo e agora tambem negociador.""

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320. Markets & Money Today | 2 Min News | The Daily News Now!

Episode: Nvidia-UAE Deal Stalls: AI Ambitions in Limbo
Date: 2025-10-03 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the delay in a major Nvidia-UAE deal involving AI chip shipments, highlighting the strategic impact and frustration within Nvidia and stakeholders. The stalled agreement affects Nvidia's market expansion and has broader tech and diplomatic implications.

"There's growing frustration among top executives at Nvidia, including CEO Jensen Huang, as well as within some parts of the United States administration."

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321. Machines Like Us

Episode: The Man Behind the World's Most Coveted Microchip
Date: 2025-12-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's central role in AI hardware and its CEO Jensen Huang, highlighting his transformation of the company into an AI powerhouse and his rising prominence in the tech world. It provides a contextual overview of Huang's impact and persona but offers limited direct commentary on AI strategy, supply chain, or competition.

"Around 80% of AI tools run on NVIDIA hardware. They're the only company in the world that's able to produce the most advanced AI chips at scale."

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322. The New Yorker Radio Hour

Episode: Why the Tech Giant Nvidia May Own the Future. Plus, Joshua Rothman on Taking A.I Seriously
Date: 2025-04-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides an in-depth discussion on Nvidia's pivotal role in AI technology, especially highlighting its dominance in AI microchips essential for systems like ChatGPT and its significance in the tech industry and geopolitical landscape between the US and China.

"Nvidia makes microchips. In fact, it's all but cornered the market on the chips that are essential for the use of AI, for artificial intelligence systems like ChatGPT."

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323. Nofinancieros

Episode: Nvidia, el vendedor de palas
Date: 2025-11-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode provides a detailed overview of NVIDIA, highlighting the company's significant role in the AI sector, its 31-year trajectory, and its involvement in various industries such as autonomous driving, robotics, and healthcare. It also touches on Jensen Huang's recent keynote and roadshow activities, emphasizing NVIDIA's position as a crucial provider of AI infrastructure.

"Mientras todos estan en la carrera de la IA, el que les esta vendiendo las palas y los vaqueros y las herramientas para poder generar IA, pues aqui esta."

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324. The Rundown

Episode: Deep Dive: Nvidia's AI Chips Are the New Oil (And That Could Make or Break Its Business)
Date: 2025-05-31 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides a comprehensive overview of NVIDIA's rise to prominence in the AI industry, highlighting its role in the global AI economy, geopolitical challenges, and Jensen Huang's leadership and strategic influence.

"NVIDIA is now the most important company in the world. They've become the backbone of the global AI economy."

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325. Bloomberg Tech

Episode: Bloomberg Technology Special Live From GTC
Date: 2025-03-20 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast segment covers NVIDIA's CEO Jensen Huang addressing his previous comments on quantum computing timelines, clarifying the distinction and convergence between quantum computing and accelerated computing for AI. It features insights from NVIDIA's quantum computing senior director and discusses the company's positioning in relation to quantum computing stocks and technologies.

"In the world of technology, historically, at least, these have been two distinct fields, quantum computing and accelerated computing or supercomputers for AI. But increasingly, those worlds are coming together."

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326. ChatGPT: OpenAI, Sam Altman, AI, Joe Rogan, Artificial Intelligence, Practical AI

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-07-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: This podcast episode discusses NVIDIA's ability to resume shipping its H20 AI chips to China after regulatory challenges, highlighting the significant revenue impact and the context behind the restrictions. It also briefly mentions NVIDIA's AI models such as the Numatron 70B.

"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo."

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327. AI Insights: AI News, Eyewitness Accounts

Episode: Nvidia's Sales Recovery in China
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's resumption of chip shipments to China after regulatory hurdles, the impact on revenue, and provides background on the US restrictions and how NVIDIA overcame them.

"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo, which is going to add billions of dollars to NVIDIA's overall revenue."

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328. Formosa English News

Episode: Mar. 20, 2025 Formosa Headline News
Date: 2025-03-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's latest innovations showcased at the NVIDIA GTC, including humanoid robots like Blue, compact AI supercomputers like the DGX Spark, and advanced cooling technologies, highlighting NVIDIA's expansion beyond chip manufacturing.

"At his keynote speech the day before, CEO Jensen Huang interacted with Blue, an adorable robot buddy."

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329. Latent Space AI

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent ability to resume shipping its H20 AI chips to China after regulatory hurdles, highlighting the significant revenue impact and the regulatory background affecting this move.

"Nvidia made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China, which is going to add billions of dollars to Nvidia's overall revenue."

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330. Founder Built: Interviews, News, Startups, Lex Fridman, Joe Rogan, AI

Episode: Nvidia Resumes AI Chip Sales in China
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of AI chip sales to China after regulatory restrictions, the impact on revenue, and the background of these developments. It highlights the significance of this move for Nvidia's business amid U.S. restrictions.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers and the reason why they're back on track is also quite a crazy story."

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331. Your Undivided AI Attention

Episode: Nvidia's Strategic Shift on China
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's ability to resume shipping AI chips, specifically the H20 AI chips, to China after regulatory uncertainties, highlighting the significant revenue impact and strategic shifts. It also briefly mentions NVIDIA's AI model Numatron 70B amidst a broader discussion of AI models.

"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers, and the reason why they're back on track is also quite a crazy story."

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332. Machine Learning: News on AI, OpenAI, ChatGPT, Artificial Intelligence, AI Models

Episode: Nvidia's Strategic Shift on China
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of shipping its H20 AI chips to China following US regulatory changes, highlighting the significant revenue impact and the strategic implications for the company.
"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers and the reason why they're back on track is also quite a crazy story."

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333. AI Breakdown

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-07-21 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent ability to resume shipping its H20 AI chips to China following regulatory challenges, including the expected significant revenue impact. It provides background on past restrictions and the implications for NVIDIA's business moving forward.
"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to NVIDIA's overall revenue."

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334. The Dig AI

Episode: Nvidia's Sales Recovery in China
Date: 2025-10-13 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of shipping AI chips to China after regulatory hurdles, highlighting the substantial revenue impact and recent developments enabling the sales restart. It also briefly mentions Nvidia's AI model Numatron 70b among other top AI models.
"Nvidia made this big announcement and essentially they're able to restart the sale of their H20 AI chips to China, which is going to add billions of dollars to Nvidia's overall revenue."

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335. Open AI

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-07-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of shipments of their H20 AI chips to China after regulatory delays, the resulting significant revenue impact, and the regulatory background. The focus is on recent developments in NVIDIA's supply chain and business strategy related to international sales.
"Nvidia is set to start shipping chips back to China again after months of this being in limbo, which will add billions of dollars to their overall revenue."

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336. This Week's Tech: AI News, Tech News, OpenAI, ChatGPT, Google Gemini

Episode: Nvidia's Sales Recovery in China
Date: 2025-10-10 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of shipments of H20 AI chips to China after regulatory restrictions, highlighting the significant revenue impact and the background story of these developments.
"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo, which is going to add billions of dollars to NVIDIA's overall revenue."

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337. Everyday AI

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-07-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of shipping its H20 AI chips to China after navigating U.S. regulatory restrictions, highlighting the significant revenue impact and the background behind this development.
"NVIDIA made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China."

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338. A Podcast About AI

Episode: Nvidia Surges Past $57B Revenue Amid AI Spending Boom
Date: 2025-11-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record-setting quarterly earnings amid widespread AI industry skepticism, highlighting the company's strong market performance and significant investments in AI startups. Jensen Huang is mentioned as bullish on Nvidia's prospects despite concerns about an AI bubble.
"So the founder and CEO, Jensen Wang, he seems very bullish."

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339. Market Mover

Episode: Jensen Huang, la rockstar dei chip
Date: 2026-01-08 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA CEO Jensen Huang's presentation at CES 2025, focusing on NVIDIA's advancements in AI robotics and generalist robot platforms, highlighting their strategic drive in AI innovation and engagement with major partners. It also touches on Huang's reassurance to investors regarding the company's future.
""Dopo aver presentato un anno fa... l'AI Physics. Lui aveva detto la seguente cosa, intendo fare trilioni di dollari con la robotica, con l'intelligenza artificiale applicata alla robotica.""

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340. Bloomberg News Now

Episode: Trump Tariffs Ruled Illegal, Nvidia Earnings Beat, More
Date: 2025-05-29 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Nvidia CEO Jensen Huang discusses the company's revenue forecast and the impact of U.S. export controls, emphasizing a positive outlook on tariffs as a strategy to encourage domestic investment and onshoring manufacturing. The company expects $45 billion in sales despite $8 billion lost due to export restrictions in China.
"The idea of tariffs being a pillar of a bold vision to re-industrialize, to onshore manufacturing, and motivate the world to invest in the United States is just an incredible vision. I think this is going to be a transformative idea for the next century for us."

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341. 15Mins Today

Episode: WHOIsEp.01 : The Dishwasher Who Built the AI Empire AI
Date: 2025-11-03 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: This podcast episode provides a comprehensive narrative about Jensen Huang's background, NVIDIA's founding, growth trajectory, and pivotal role in the AI revolution. It highlights NVIDIA's transformation from a gaming graphics company to a dominant AI chip market leader and Huang's leadership and wealth accumulation.
"Under Wang's leadership, NVIDIA evolved from gaming graphics to powering artificial intelligence applications worldwide."

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342. The Platform Economist

Episode: Nvidia- From Zero to AI Trillions
Date: 2025-07-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: This podcast episode provides an in-depth narrative on NVIDIA's journey from near bankruptcy to becoming a dominant AI powerhouse, highlighting Jensen Huang's early vision and risky bets on GPUs and the company's evolution in the AI market.
"He thought video games, not standard computing, would be the thing driving the next big leap in processors. He was betting on these graphics chips, GPUs to solve problems that regular CPUs just, well, choked on."

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343. The Last Invention is AI

Episode: The Truth Behind Nvidia's Export Control Strategy
Date: 2025-08-09 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the arrest of two individuals smuggling high-performance AI chips, reportedly NVIDIA's, to China, highlighting issues around NVIDIA's export control strategy, governmental responses, and concerns about supply chain security in the U.S.-China AI race.
"Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were NVIDIA chips."

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344. The AI Policy Podcast

Episode: The Future of Nvidia's H200 in China and the Pentagon's New AI Strategy
Date: 2026-01-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent policy developments regarding the export of NVIDIA's H200 AI chips to China, including governmental regulations and geopolitical responses, with some mention of negotiations involving NVIDIA's CEO Jensen Huang.
"President Trump had previously negotiated a deal with NVIDIA CEO Jensen Huang that AI chip exports to China,"

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345. AI for Career Success

Episode: Nvidia's $20 Billion Groq Deal Not What You Think: Five Takeaways
Date: 2026-01-06 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic $20 billion deal involving the AI chip startup Groq, highlighting it as a key playbook for dominating the next phase of the AI revolution and emphasizing an unconventional deal structure unusual for Silicon Valley.
"This move by NVIDIA... it's so much more than just a simple acquisition. It's really a detailed playbook for dominating the next phase of the AI revolution."

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346. AI Proving Ground Podcast: Exploring Artificial Intelligence & Enterprise AI with World Wide Technology

Episode: Inside NVIDIA's AI Factory
Date: 2025-12-16 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast delves into NVIDIA's pioneering role in defining and operationalizing the concept of an AI Factory, with insiders discussing how enterprises can build, run, and secure AI capabilities at scale using NVIDIA's architecture and tools.
"Few companies have shaped this conversation more than NVIDIA... by pulling it into the mainstream, defining the architecture and showing the world what an AI Factory actually looks like."

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347. Bloomberg News Now

Episode: Trade Strategy Roiled by Court, Huang on Chinese AI Rivals, More
Date: 2025-05-29 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: NVIDIA's CEO Jensen Huang discusses the company's challenges and strategies regarding Chinese AI rivals and U.S. export restrictions, noting that competitors like Huawei are filling the void left by NVIDIA's reduced presence in China due to export controls.
"Without American technology, the availability of Chinese technology will fill the market. And so, you know, whatever we offer has to at least be competitive and has to add value to the market."

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348. The Beijing Hour

Episode: Third China International Supply Chain Expo opens in Beijing
Date: 2025-07-16 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: In an interview at the China International Supply Chain Expo, NVIDIA CEO Jensen Huang discusses the return of the H20 chip to China, competition from advancing Chinese chipmakers, and the impact of changes in US export restrictions on serving the Chinese market. He notes the high demand for NVIDIA's H20 hopper architecture driven by advanced AI models in China and acknowledges the competition Nvidia faces.
"The Chinese chips are advancing very quickly, and so we will have to do our best."

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349. The Hardware Unboxed Podcast

Episode: Why is RTX 5090 and RTX 5080 Supply So Bad?
Date: 2025-02-08 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses the worsening supply situation for NVIDIA's RTX 5080 and 5090 GPUs, noting how availability and pricing have deteriorated compared to previous product launches. The hosts speculate on NVIDIA's strategy possibly prolonging limited supply periods and the impact on MSRP pricing.
"I think what used to be fairly normal for product launches where availability was poor is becoming more of the norm. It seems like they're trying to prolong that period."

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350. The a16z Show

Episode: Dylan Patel on the AI Chip Race - NVIDIA, Intel & the US Government vs. China
Date: 2025-09-22 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's surprising $5 billion investment in Intel and their collaboration on custom data centers and PC products, highlighting this alliance as a significant and positive development in the semiconductor and AI chip race. The discussion points to NVIDIA's influential market role and the strategic implications for competitors like AMD and ARM.
"Jensen is like the Buffett effect for the semiconductor world."

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351. Artificial Intelligence: AI News, ChatGPT, OpenAI, LLM, Anthropic, Claude, Google AI

Episode: NVIDIA Restricts China H200 Chip Access
Date: 2026-01-11 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent policy changes requiring upfront payment for their most advanced AI chips sold in China, particularly the H200 model, highlighting the company's tightening control amid high demand and geopolitical concerns. It covers the impact on the Chinese market and broader implications for NVIDIA's AI hardware footprint across industries.

"Right now they are tightening their grip on how their most advanced chips are sold in China. There's obviously a lot of demand for their hardware...they're now requiring Chinese customers to pay the full cost upfront for their H200 AI chips."

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352. Perplexity AI

Episode: The Top AI Players and Their Latest Moves
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $5 billion strategic investment in Intel, highlighting a partnership to co-develop AI-focused chips that integrate NVIDIA's GPUs with Intel's CPUs, emphasizing NVIDIA's market dominance and competitive positioning against AMD. This move is framed as a transformative play reshaping the AI hardware landscape and ensuring NVIDIA's leadership.
"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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353. Schwab Network

Episode: NVDA Short v. Long-Term Outlook: Blackwell, DeepSeek & A.I. Trends
Date: 2025-05-28 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's upcoming earnings, focusing on concerns about a $5.5 billion inventory write-down related to the H20 chip ban and its impact on revenue, while also highlighting strong growth in newer chips like the Hopper 200 and Grace Blackwell 200 that may offset these challenges. Analysts express a conundrum regarding near-term revenue impacts versus growth potential.
""...analysts who are very worried that with this upcoming ban on the H20 chip, which is expected to create about a $5.5 billion inventory write down... but others see strong growth in their Hopper 200 and Grace Blackwell 200 chips that may offset the lost revenue.""

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354. Schwab Network

Episode: Why NVDA Powered Down After "Blowout" Earnings, GOOGL's Demand Question
Date: 2025-12-01 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong earnings, record revenue, and positive outlook driven by increased capital expenditure from major hyperscaler customers, indicating confidence in NVIDIA's business performance despite recent stock volatility.
"NVIDIA is doing great. Like you said, earnings were a blowout. And if we look to hyperscalers' earnings calls, you'll see that the big four, Meta, Google, Amazon, Microsoft, they all said they're going to increase their 2026 capex spending... And NVIDIA will capture a lot of that."

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355. GoodNightCoffee

Episode: ():AnthropicTPU,,
Date: 2026-01-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic cooperation with Lenovo, highlighting their joint development of an enterprise-level AI product and an upcoming Lenovo Enterprise AI system based on NVIDIA's RTX Pro chips, emphasizing expansion plans and AI strategy focused on hybrid AI.
"Jensen Huang noted during the discussion that artificial intelligence is evolving from generative AI toward agentic AI, which possesses stronger problem-solving capabilities and fact-based reasoning abilities."

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356. Last Week in AI

Episode: Nvidia's Monster Quarter Raises Eyebrows
Date: 2025-11-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's impressive quarterly earnings that surprised many and seemingly quieted AI bubble concerns. It highlights NVIDIA's strategy of investing in major AI companies, sustaining its market rally and influence in the AI industry, with the founder Jensen Huang noted as very bullish about the company.
"The founder and CEO, Jensen Wang, he seems very bullish. People are talking... oh my gosh, the AI bubble is about to pop and the stock market is going to crash."

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357. Bitcoin & Crypto News Today | 2 Min News | The Daily News Now!

Episode: Nvidia's Vera Rubin: AI Efficiency Boost, Decentralized Networks Thrive
Date: 2026-01-08 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's launch of the Vera Rubin computing platform, emphasizing its AI efficiency benefits and competitive impact on decentralized GPU networks, as well as ongoing supply chain constraints affecting GPU availability through 2026.
"NVIDIA just unveiled its new Vera Rubin computing platform at CES 2026, a system of six advanced chips designed to slash the costs of training and running AI models. Named after astronomer Vera Florence Cooper Rubin, it's now in full production, as CEO Jensen Huang announced."

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358. Newswrap

Episode: Thursday
Date: 2025-07-17 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: In this podcast excerpt, NVIDIA CEO Jensen Huang praises China's supply chain as a miracle with vast AI and computer science expertise. He emphasizes the importance of global collaboration despite US-China tech tensions and announces plans to ramp up supply of Chinese-compliant H20 AI chips in China.
"NVIDIA CEO Jensen Huang has described China's supply chain as a miracle, and he highlighted the nation's deep capabilities in artificial intelligence and computer science."

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359. Hong Kong Today

Episode: Friday
Date: 2025-07-18 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang praises China's supply chain as a miracle, highlighting its depth in AI and computer science, and emphasizes the importance of continued collaboration despite geopolitical tensions. He also discusses plans to ramp up supply of China-compliant AI chips and NVIDIA's contributions to global supply systems.
"NVIDIA CEO Jensen Huang has described China's supply chain as a miracle and he highlighted the nation's deep capabilities in artificial intelligence and computer science."

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360. Bloomberg Tech

Episode: Nvidia's Forecast Lifts AI Trade
Date: 2025-11-20 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features an exclusive post-earnings interview with NVIDIA CEO Jensen Huang, discussing the company's strong revenue forecast and its leadership in AI technology, which alleviated investor concerns about an AI bubble. The conversation touched on demand, supply, and NVIDIA's technological strengths in the AI market.
"There was a lot of fighting talk on the demand side, on the supply side, and how good NVIDIA's technology is."

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361. War on the Rocks

Episode: The Chip That Crossed the Line? NVIDIA, China, and the Great Power Tech Race
Date: 2025-08-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses the recent U.S. export control decisions regarding NVIDIA's H20 AI chips and their implications for national security, AI leadership, and U.S.-China competition. It includes expert perspectives on the geopolitical and strategic significance of NVIDIA's technology in the AI hardware landscape.
"The United States has just given the green light for NVIDIA's H20 chips, originally restricted under export controls to be sold to China."

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362. Bloomberg Daybreak: Asia Edition

Episode: US Futures, Nvidia Drop After Chipmaker's Tepid Outlook
Date: 2025-08-28 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent quarterly results, focusing on data center revenue falling slightly below expectations, the lack of H20 chip sales to China, and removal of China data center revenue from forward projections. Analysts express lukewarm reactions to the company's outlook amid evolving US-China trade restrictions.
"'I mean, just the guide, the three cube expectations were 54 to 55 billion. And to my mind, this print is not something to be excited about.'"

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363. TechDaily.ai

Episode: Inside Big Tech's $400B Rebellion Against Nvidia's AI Monopoly
Date: 2025-12-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the extensive corporate efforts by major tech companies to reduce reliance on NVIDIA's AI chips by investing heavily in their own chip development. It highlights the significant financial commitment of over $400 billion aimed at challenging NVIDIA's dominant position.
"If you just look at the numbers for 2025 alone, you've got Google, Microsoft, Amazon and OpenAI together. They've allocated more than $400 billion. They're just burning through that cash to try and make sure they are not completely controlled by NVIDIA."

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364. (Audio)NEWS/VIEWS/NOVELS

Episode: Business Matters:China's Economy Slows as Consumers Tighten Belts
Date: 2025-07-16 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's plans to resume sales of its AI chips to China under U.S. export controls, highlighting CEO Jensen Huang's recent visit to Beijing and meetings with both U.S. and Chinese officials. It also touches on competition with Chinese firms

like Huawei and Nvidia's strategy to develop compliant AI chip models for the Chinese market amid ongoing trade tensions.

"Nvidia said it plans to resume sales of its H20 artificial intelligence chip to China days after its CEO, who is visiting Beijing, met U.S. President Donald Trump."

365. Formosa English News

Episode: Jan. 6, 2026 Formosa Headline News

Date: 2026-01-07 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA CEO Jensen Huang's keynote at CES 2026 highlighting NVIDIA's strong AI strategy, innovation in self-driving car systems, humanoid robots, and partnerships with Taiwanese firms. It emphasizes NVIDIA's leadership in AI modernization and safety certifications in automotive AI systems.

""People ask, where is the money coming from? That's where the money is coming from. The modernization of AI to AI, the shifting of R&D budgets from classical methods to now artificial intelligence methods.""

366. DX Today | No-Hype Podcast & News About AI & DX

Episode: DX Today AI Daily Brief - Friday January 23, 2026

Date: 2026-01-23 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's CEO Jensen Huang's perspective on AI's impact on the workforce, emphasizing AI as a tool that transforms job tasks rather than eliminates jobs, highlighting AI as an amplifier of human capability. This reflects NVIDIA's broader AI strategy indirectly, focusing on AI's role in enhancing productivity and redesigning workflows.

"Huang emphasized that artificial intelligence should be viewed as a tool that changes the composition of jobs rather than eliminating them entirely."

367. Trumponomics

Episode: The Promise and Peril of Trump's Big AI Plan

Date: 2025-07-30 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses Jensen Huang's lobbying efforts in response to the Trump administration's ban on NVIDIA chip sales to China and highlights his strategic argument advocating continued sales to maintain market dominance in China, amidst governmental tensions. The impact on NVIDIA's revenue and AI supply chain strategy vis-a-vis competition with China is analyzed.

""Back in April, the White House enacted a ban on NVIDIA's chip sales to China. That's a huge problem for NVIDIA because it said it would cost $15 billion in revenue.""

368. AI for Career Success

Episode: Nvidia Earnings Prove AI Bubble Fears Wrong

Date: 2025-11-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast episode discusses Nvidia's Q3 earnings as a critical stress test for the AI economy, addressing market skepticism and emphasizing strong demand for Nvidia's high-end Blackwell chips and stable gross margins. It highlights the complexity and adoption rate of Nvidia's products, signaling robust enterprise spending rather than hype.

"The report mentioned a really strong Blackwell ultra ramp. And here's a detail that really jumped out at me. The GB300, which is the high-end, more complex chip, it's now making up about two-thirds of all Blackwell revenue. Customers are choosing maximum performance, not the cheaper option."

369. Talking Tech with SomeGadgetGuy (#SGGQA)

Episode: #SGGQA 413: NVIDIA Stake in Intel, Samsung Fridge Ads, MediaTek's NEW DIMENSITY 9500

Date: 2025-09-22 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses NVIDIA's $5 billion investment in Intel to integrate their chip architectures for AI applications using NVIDIA's NVLink technology, as well as speculation about Intel's GPU roadmap potentially being influenced by this collaboration. The mention highlights strategic moves by NVIDIA in AI hardware collaboration and competition with Intel.

"NVIDIA pays $5 billion stake in Intel planning AI chip collaboration. The companies will integrate their two architectures using NVIDIA's NVLink interface, which enables data and control code transfers between CPUs and GPUs."

370. This Week in News

Episode: AI Highlights: Apple, Intel, Nvidia Lead

Date: 2025-10-05 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's recent $5 billion investment in Intel, framing it as a strategic move to co-develop AI hardware combining Intel CPUs and NVIDIA GPUs, aiming to dominate the AI chip market before competitors like AMD catch up. It highlights NVIDIA's record-breaking quarter and this partnership as a significant reshaping of the AI hardware landscape.

"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it. 4% of Intel instantly becoming one

of Intel's largest shareholders. But it's not just about the money. This is about survival in the AI chip board."

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371. Global News Podcast

Episode: How Nvidia, Apple, and Intel Drive Innovation
Date: 2025-10-05 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic $5 billion investment in Intel, transforming their relationship from rivals to collaborators, co-developing AI data center and PC chips, which strengthens NVIDIA's dominance in the AI hardware market. This partnership is highlighted as a pivotal move against competition from AMD, following NVIDIA's record-breaking financial quarter.
"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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372. Hard Fork AI

Episode: AI News Recap: Apple, Intel, Nvidia Updates
Date: 2025-10-04 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic $5 billion investment in Intel, highlighting a partnership aimed at co-developing AI-focused data center and PC chips to secure NVIDIA's dominance in AI hardware before AMD catches up. The mention emphasizes NVIDIA's record-breaking quarter and frames the move as reshaping the AI hardware market by turning a former rival into a key ally.
"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it, 4% of Intel, instantly becoming one of Intel's largest shareholders."

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373. CNBC's "Fast Money"

Episode: Nvidia Reports Results... And A Big Move In The Pharma Space 2/26/25
Date: 2025-02-26 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's recent quarterly earnings beat on both revenue and profit, with growth slowing but guidance exceeding expectations. Discussion includes data center revenue dominance, introduction of Blackwell architecture GPUs, margin concerns, and cautious outlooks from commentators.
"The one number that stuck out to me, Christina just mentioned, gross margins are starting to go, I think, the wrong way."

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374. TEO Podcast: Kunstliche Intelligenz, Tech Trends & Aktien

Episode: #618: NVIDIA prasentiert Rekordzahlen & Googles neue Bild-KI Nano Banana
Date: 2025-08-28 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses NVIDIA's recent record-breaking quarterly results, highlighting significant revenue and profit growth, as well as the raised guidance for the next quarter. The host compares NVIDIA's growth rates favorably against competitors like Apple, emphasizing NVIDIA's strong performance as the largest company globally.
"Der Umsatz ist im Vergleich zum Vorjahr um 56% gestiegen und der Gewinn sogar um 59%. Und das ist einfach so krass, wenn man sich mal uberlegt, dass das schon die grote Company in der Welt ist."

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375. Bloomberg Tech

Episode: Nvidia's New AI Offerings, Musk Buys More X Shares
Date: 2025-03-19 | Relevance: 85/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast covers NVIDIA CEO Jensen Huang's unveiling of new AI chips and technology at the annual developer conference, noting the market's underwhelmed response despite the innovations. Discussions include NVIDIA's ongoing AI advancements, product iterations, and investor reactions amid broader market and AI cost concerns.
"NVIDIA CEO Jensen Huang unveils new AI chips and technology at the company's annual developer conference, but fails to wow investors."

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376. Innovation by default

Episode: #127 - La fe del jugador y y el codigo que conquisto el mundo
Date: 2025-05-24 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides a narrative on Jensen Huang's journey and NVIDIA's evolution from a gaming graphics card company to a pivotal player in AI technology, cloud computing, and other emerging fields. It highlights Huang's vision and leadership in recognizing the importance of specialized processors for AI, emphasizing the company's strategic impact in the technology landscape.
"Jensen Juan...combines technical talent, an almost inhuman resistance to failure, and strategic vision that allowed him to see before anyone else that artificial intelligence would not be built with new ideas, but with new processors."

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377. Tech Brew Ride Home

Episode: Nvidia $5T
Date: 2025-10-29 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent achievements including hitting a $5 trillion market cap, significant stock gains, and multiple strategic partnerships announced at the NVIDIA GTC event involving AI, autonomous vehicles, and supercomputing. It highlights NVIDIA's new tech platform Drive AGX Hyperion 10 and collaborations with companies like Nokia, Eli Lilly, Palantir, Lucid, Uber, and Stellantis.

"NVIDIA this morning became the first company in history to hit a $5 trillion market cap, climbing 5% in early trading."

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378. FLASH DIARIO de El Siglo 21 es Hoy

Episode: Mini supercomputador de Nvidia
Date: 2025-10-15 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's launch of the DGX Spark, a compact supercomputer designed to run large AI models on a desktop without cloud dependence. It highlights the device's specifications, intended users, and an unusual promotional event involving CEO Jensen Wang delivering the first unit to Elon Musk at SpaceX.

"Jensen Wang, the CEO of Nvidia, llevo personalmente el primer Spark a Elon Musk en las instalaciones de SpaceX en Texas, justo antes del ensayo numero 11 del cohete Starship."

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379. Tech News Today | 2 Min News | The Daily News Now!

Episode: Nvidia CEO Dismisses Tension, Pledges OpenAI Support
Date: 2026-01-31 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Nvidia CEO Jensen Huang publicly dismisses reports of tension with OpenAI, reaffirming Nvidia's significant financial commitment and strategic partnership with OpenAI in AI development. He emphasizes Nvidia's role in powering OpenAI's breakthroughs and its ongoing support in their AI initiatives.

"Nvidia will pour a great deal of money into OpenAI because he believes in their incredible work. They're one of the most important companies today."

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380. Geek Forever's Podcast

Episode: NVIDIA Intel "" ? | Geek Daily EP330
Date: 2025-09-19 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's strategic investment in Intel, highlighting Nvidia's dominance in AI GPU technology and Intel's recent challenges, alongside speculation on cooperation between once rival companies. It contextualizes Nvidia's leadership in AI and Intel's missed opportunities, framing Nvidia's move as a significant but complex strategy.

"'Nvidia is now the new king of the tech industry, the hottest company in the world with GPUs as the brain behind AI revolutions like ChatGPT and MidJourney.'"

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381. A Podcast About AI

Episode: Nvidia Reenters Chinese Tech Market
Date: 2025-07-21 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of chip shipments to China after regulatory restrictions, highlighting significant revenue impact and background on the developments enabling this change. It also mentions Nvidia's AI chip model Numatron 70b among other AI models.

"Nvidia made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China, which is something that they were formerly selling."

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382. Schwab Network

Episode: $1,000 NVDA "Conservative?" Phil Panaro's Case for "Trillions" in Nvidia Revenue
Date: 2025-11-20 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: Phil Panaro discusses Nvidia's strong earnings performance driven by AI advancements, highlighting the company's doubling of revenue in one quarter compared to 2023 and framing AI as transformative as electricity. The discussion positions Nvidia as a dominant player benefiting from the AI boom with significant revenue growth and optimistic outlook.

"So the real question is why is that and what's so special about Nvidia? And the real answer is basically the AI revolution."

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383. AI Investing: for the AI Investor

Episode: AI Chips Flow Again: Nvidia in China
Date: 2025-07-26 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of AI chip shipments to China after regulatory restrictions, highlighting the significant revenue impact and changes enabling this development. It also briefly touches on Nvidia's AI models available through a new platform.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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384. The Pour Over AI

Episode: Nvidia's China Comeback
Date: 2025-09-17 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of shipping its H20 AI chips to China following regulatory changes, highlighting the potential billions in revenue this move could generate and touching on the broader context of US restrictions impacting Nvidia's business.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, which is going to add billions of dollars to Nvidia's overall revenue."

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385. Bloomberg Intelligence

Episode: Nvidia is First to $5 Trillion
Date: 2025-10-29 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's milestone of reaching a $5 trillion market cap, highlighting robust AI-related revenue growth and continued strong demand from major hyperscalers like Microsoft, Meta, and Amazon. Jensen Huang's confident statements at NVIDIA's GTC event signal continued momentum in AI investments with no signs of a market bubble.

"Jensen Huang was emphatic in saying that he sees no sign of a bubble coming and that he expects another 500 billion in revenue over the next five quarters tied to all of that."

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386. Nachrichten

Episode: Nachrichten - 2025-05-19
Date: 2025-05-19 | Relevance: 80/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang announced the opening of Nvidia's new Taiwan office, Nvidia Constellation, highlighting Taiwan's central role in AI and robotics development and expressing the company's expanding local partnerships. The discussion touches on Nvidia's strategic positioning and collaboration within Taiwan's tech ecosystem.

"We've also been selecting the sites. Bei der Auswahl des Standorts waren die Burgermeister und die verschiedenen Stadte sehr zuvorkommend. Ich denke, wir machten einige gute Deals. Ich bin nicht sicher. Es scheint sehr teuer. Aber beste Lage ist eben beste Lage. Deshalb freue ich mich sehr, heute zu verkunden, dass Nvidia Constellation in Beito Schulin sein wird."

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387. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: Nvidia's Investments In $1B+ AI Startups
Date: 2026-01-03 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode provides a detailed discussion on NVIDIA's AI investments, focusing on the number of venture deals made in 2024, the companies invested in, and the related financial dynamics. The discussion highlights NVIDIA's key role in fueling AI growth through strategic investments, though it does not include direct comments from Jensen Huang.

"Nvidia's seen explosive growth from all of their AI products that followed."

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388. Absolute Return Podcast

Episode: #266 - Is AI a Bubble with Gabelli Portfolio Manager John Belton
Date: 2026-01-27 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the AI value chain, highlighting NVIDIA as the clear leader in the chip layer of AI technology, with strong growth prospects ahead. The speaker views NVIDIA positively as a fundamental player and worthy investment in the AI hardware segment.

"At the chip layer, it's kind of become obvious who the winners are there. You've got basically a far and ahead leader in NVIDIA... I still think those leaders still have a lot of growth ahead of them, NVIDIA included."

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389. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: What Happens When AI Obliterates Your Business Model?
Date: 2026-01-09 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's ramp-up of AI chip production for China amidst geopolitical challenges, including Chinese government restrictions and balancing domestic chip policies. Jensen Huang comments on supply chain activations and the status of export paperwork, highlighting strong Chinese demand despite regulatory hurdles.
"We've fired up our supply chain and H200s are flowing through the line."

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390. The Sunday Briefing

Episode: Behind The Scenes: Inside Trump's Middle East Peace Deal
Date: 2025-10-19 | Relevance: 80/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features an interview with NVIDIA CEO Jensen Huang discussing the company's historic achievement of manufacturing the most advanced AI chips and semiconductor fabs in the United States, enabled by government policies and strategic partnerships like TSMC.
"Yeah, this last week was a historic week. We manufactured the most advanced AI chips in the world and the most advanced fab in the world here in America for the first time."

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391. On Point with Meghna Chakrabarti

Episode: A strange turn in the AI chip race with China
Date: 2026-01-09 | Relevance: 80/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's efforts to gain government approval for selling the powerful H200 AI chip to China, touching upon the strategic implications, manufacturing acceleration in the US, and political criticism around national security concerns. It highlights Huang's push for easing export restrictions amid scrutiny from lawmakers.
"We're going to build NVIDIA's technology, the next generation of that, all here in the United States, without the president's leadership, his policies, his support, and very importantly, his strong encouragement. And I mean his strong encouragement. Frankly, manufacturing in the United States wouldn't have accelerated to this pace."

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392. KI-Update - ein heise-Podcast

Episode: KI-Update Deep-Dive: Hardware-Engpasse und Machtspiele auf dem KI-Markt
Date: 2025-03-07 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in the AI hardware market, the impact of U.S. export restrictions, competition from other chip manufacturers, and NVIDIA's strong financial performance as reported in recent quarterly results. However, the discussion does not include direct quotes from Jensen Huang nor specific insights into NVIDIA's AI strategy or supply chain details.
"Nach wie vor ist es so, dass Nvidia diesen Markt gnadenlos dominiert und wahnsinnige Ertrage damit erzielen kann."

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393. Broken Silicon

Episode: 344. AMD FSR 4 on RDNA 3 Leak, RTX 6090 Launch Timing, Nvidia DLSS 4.5, Panther Lake
Date: 2026-01-13 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's announcement of DLSS 4.5, detailing its advanced AI-driven features that significantly improve image quality and performance. It highlights NVIDIA's AI strategy as exemplified by the new DLSS technology, indicating ongoing innovation and supply considerations linked to AI demand.
"At CES 2026, we're raising the bar with NVIDIA DLSS 4.5, introducing a second generation transformer model for DLSS super resolution that delivers state of the art image quality for all GeForce RTX GPUs in over 400 games and apps."

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394. Tomorrow's AI Today

Episode: NVIDIA's Trillion-Dollar Lawsuit, AI Grid Collapse & Cancer Detection Breakthrough | AI Daily 01/03/25
Date: 2025-03-01 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses the US Department of Justice's antitrust lawsuit against NVIDIA for monopolizing the AI chip market, detailing stock impacts and expert analyses drawing parallels to historic tech monopolies. It covers the demand for NVIDIA to divest its Quuda software division and license patents to competitors, highlighting broader implications for the AI hardware ecosystem.
"NVIDIA's stranglehold on AI compute threatens national security and innovation, said Attorney General Matthew Peters."

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395. Reshaping Workflows with Dell Pro Precision and NVIDIA RTX PRO GPUs

Episode: Cracking the Code: NVIDIA GPU Optimization with Matthew Nicely
Date: 2026-01-29 | Relevance: 85/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features a NVIDIA product manager discussing a GPU mode optimization competition focused on NVIDIA's Blackwell GPUs, encouraging participation and detailing upcoming challenges and prizes. The discussion also touches on NVIDIA's AI software platform team and their work on optimizing AI inference and training stacks.

"We're in the middle of a kernel competition with GPU mode on NVIDIA GPUs, specifically Blackwell... there's a prize for the top performing kernel for each problem."

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396. World Business Report

Episode: Do NVIDIA results suggest AI boom or bubble?
Date: 2025-11-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong quarterly financial results and the impact of major AI deals with companies like Anthropic, OpenAI, and XAI, highlighting NVIDIA's prominent position in the AI chip market amid debate on AI boom versus bubble.

"Quarterly revenues are $57 billion, up 62% on a year ago, and the world's most valuable company is expecting sales to hit $65 billion over the quarter."

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397. The Political Scene | The New Yorker

Episode: The Company Behind the A.I. Boom
Date: 2025-12-29 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's pivotal role in the AI industry, emphasizing its hardware innovation with parallel computing and its foundational importance to the AI revolution. It highlights how NVIDIA and its CEO Jensen Huang are central to shaping technological futures, especially amid the US-China rivalry in tech.

"Virtually all of [the data centers] are using chips built by the tech colossus NVIDIA. The company has nearly cornered the market on the hardware that runs much of A.I."

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398. WSJ What's News

Episode: Nvidia to Resume AI Chip Sales to China
Date: 2025-07-15 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia resuming sales of its AI chips to China after receiving approval from the U.S. government, highlighting CEO Jensen Huang's involvement and positive outlook on shipping the H20 chips soon. It also notes diplomatic factors influencing this decision and Nvidia's business strategy regarding China.

"I'm looking forward to shipping H20s very soon, and so I'm very happy with that very, very good news."

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399. The John Batchelor Show

Episode: NVDA AND AI: COMPETITION PRC. BRANDON WEICHERT.
Date: 2025-07-19 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in AI chip manufacturing, geopolitical challenges with China affecting growth, and the importance of NVIDIA's high-end chips in AI development. It highlights NVIDIA's market value and strategic significance amid US-China tech competition.

""To do proper AI research and development, you have to have these high end chips. NVIDIA is one of the dominant...""

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400. Upgrade AI

Episode: Nvidia's Mega Quarter Resets Expectations
Date: 2025-11-20 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's impressive quarterly earnings that have surprised the market and have implications for the AI bubble narrative. It highlights NVIDIA's ongoing investments in AI companies and Jensen Huang's bullish outlook.

"So the founder and CEO, Jensen Wang, he seems very bullish."

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401. FLASH DIARIO de El Siglo 21 es Hoy

Episode: Mini supercomputador de Nvidia
Date: 2025-10-15 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's launch of the DGX Spark, a compact supercomputer designed for AI development, highlighting its technical specifications and strategic positioning away from gaming and home use towards developers and researchers. It also mentions Jensen Huang personally delivering the first unit to SpaceX, underscoring Nvidia's commitment to integrating AI computing power in advanced fields.

"Segun Nvidia, el Spark no es una computadora que este pensada para videojuegos ni para uso domestico, mas bien para desarrolladores, investigadores y creadores que necesiten una potencia de supercomputador sin depender de la nube."

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402. BNR Headlines

Episode: Nvidia investeert miljard in productie in VS
Date: 2025-04-15 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's significant investment in US production facilities, highlighting their partnerships with TSMC and Foxconn, and addressing supply chain vulnerabilities related to geopolitical tensions around Taiwan. It notes the strategic move for long-term security rather than short-term efficiency.
""Taiwan is quite vulnerable because China claims Taiwan, and that claim is quite credible that they will do something about it eventually, which makes Nvidia very vulnerable.""

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403. GitHub Daily Trend

Episode: GitHub - NVIDIA/cutlass: CUDA Templates for Linear Algebra Subroutines
Date: 2025-07-14 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's Cutlass 3.8 library for CUDA programming, highlighting its support for the latest Blackwell architecture and fifth-generation Tensor Core instructions that optimize high-performance matrix operations relevant to AI workloads. The discussion explains the technical advancements in an accessible way, focusing on enhanced performance and computational efficiency.
"This new version integrates the fifth-generation Tensor Core instructions, making use of the latest advancements to get optimal performance. These Tensor Cores are like supercharged engines for computational tasks, allowing massive parallel processing."

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404. BNR Headlines

Episode: AI-chipbedrijf Nvidia overtreft verwachtingen met omzet en winst
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's strong quarterly results with a 62% revenue increase and 65% profit growth, highlighting investor concerns about AI bubbles and Jensen Huang's optimistic statements about next-generation chip revenues potentially reaching $500 billion. An analyst provides insights confirming the company's impressive performance against high expectations.
"En daarin heeft hij ook gezegd van, nou wij zien eigenlijk voor de volgende generatie chips een omzet van zo'n 500 miljard. En dat is vijf keer zoveel als de vorige."

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405. Lawfare Daily

Episode: Nvidia Returns to China's AI Market
Date: 2025-07-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's renewed ability to ship its H20 AI chips to China following regulatory challenges, highlighting the significant revenue impact and the background of US restrictions affecting Nvidia's business in China.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers, and the reason why they're back on track is also quite a crazy story."

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406. Bloomberg Tech

Episode: Nvidia Investors Digest Decelerating Growth Forecast
Date: 2025-08-28 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent earnings report highlighting decelerating revenue growth from prior years and uncertainties about Chinese market influence due to regulatory factors; Jensen Huang's comments focus on the potential for launching the Blackwell GPU architecture in China and the importance of American tech leadership in AI. The discussion also covers the impact of US-imposed tariffs on chip sales and company forecasts.
"So I think the opportunity for us to bring Blackwell to the China market is a real possibility. And so we just have to keep advocating the sensibility of and the importance of American tech companies to be able to lead and win the AI race."

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407. TechCheck

Episode: Nvidia's walled garden, plus Jensen Huang the diplomat 7/15/25
Date: 2025-07-15 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's strategic importance in maintaining its software ecosystem in China despite chip limitations, highlighting the competitive dynamics with Huawei and the potential impacts of U.S. export restrictions on the AI chip market.
"It's not just about selling chips again. It's about keeping China inside Nvidia's software ecosystem."

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408. Emerging Technology Trends: AI, Robotics & Digital Innovation

Episode: Robots Are Coming for Your Job and Jensen Huang Says the ChatGPT Moment Is HERE Plus Why Asia Is Going All In
Date: 2026-02-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast highlights CEO Jensen Huang's declaration at CES that the ChatGPT moment for physical AI has arrived, signaling NVIDIA's leadership in commercial-scale AI deployments. It discusses the booming robotics and AI market, NVIDIA's role in advancing physical AI, and the broader industrial adoption trends, particularly in Asia-Pacific.

"At CES this year, NVIDIA's Chief Executive Officer Jensen Huang declared that the ChatGPT moment for physical AI has arrived, marking the transition from experimental deployments to commercial-scale solutions."

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409. Byted Size News

Episode: Nvidia's AI Vision, Meta's Scale AI Stake Sparks Google Exit, US Uranium Mining Revival, Austin Tesla Robotaxi Protests, Amazon Sues EU Over Marketplace Rules
Date: 2025-06-14 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia CEO Jensen Huang's comments about US sanctions unintentionally fostering a strong Chinese competitor, the financial impact of these sanctions on Nvidia with a $4.5 billion inventory write-down, and Huang's strategic engagements in Europe. The segment highlights challenges in NVIDIA's supply chain and competitive landscape due to geopolitical factors.

"Nvidia CEO Jensen Huang says that US sanctions designed to slow China down have a critical side effect: While Chinese tech giant Huawei is currently a generation behind Nvidia, Huang warns that if the US won't sell to China, "Huawei has got China covered.""

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410. GoodNightCoffee

Episode: ():AI,,
Date: 2026-01-24 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discussed the need for massive AI infrastructure development, emphasizing AI as critical national infrastructure requiring sovereign capabilities. This highlights NVIDIA's strategic role in AI advancement amid broader industry discussions at the 2026 World Economic Forum.

"Advancing AI will require the largest infrastructure build-out in human history, spanning energy, chips, data centers, and end applications. Every country should treat AI as critical infrastructure, like electricity or transportation networks, and commit to building sovereign AI capabilities."

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411. The Bitcoin Layer

Episode: America's Grand Strategy: Repo, China, Jensen Huang, & Bitcoin's Next Move
Date: 2025-10-21 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's support for U.S. government policies aimed at reindustrializing chip production domestically, highlighting the impact of tariffs on accelerating American AI chip manufacturing. It emphasizes the strategic move away from Chinese supply chains and notes a CapEx boom driven by these developments.

"This last week was a historic week, we manufactured the most advanced AI chips in the world in the most advanced fab in the world here in America for the first time. All of this started with President Trump wanting to re industrialize the United States. His tariffs were a pressing agent in making this possible at the speed that we're doing."

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412. The AI Podcast

Episode: Nvidia's Strategic Shift on China
Date: 2025-07-21 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of chip shipments to China after navigating U.S. regulatory restrictions, highlighting the significant revenue impact of this development. It provides background on the regulatory environment and Nvidia's strategic moves related to this change.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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413. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: Nvidia Returning Sales To China
Date: 2025-07-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's recent development of resuming shipments of their H20 AI chips to China following regulatory challenges, highlighting the financial impact and strategic implications of this move.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

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414. Stock Movers

Episode: Nvidia Rises, Vistra Gains, Microchip Up After Sale Positive Forecast
Date: 2026-01-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's recent statements at CES about the Rubin data center processors being in production and poised for customer deployment, as well as strong demand for the H200 chip in China despite pending regulatory considerations. The Rubin chip offers significant performance improvements over predecessors, indicating positive developments for NVIDIA.
"He's saying that the company's highly anticipated Rubin data center processors, they're in production, they're on track for deployment."

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415. The Last Invention is AI

Episode: $1B+ AI Ecosystem Fortress: Nvidia Investment Strategy
Date: 2026-01-07 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode provides an in-depth look at Nvidia's AI investment strategy, breaking down over 67 venture deals, mainly in 2024, and discussing how these investments support Nvidia's GPU sales and AI compute infrastructure. It offers insights into Nvidia's broad involvement in the AI ecosystem and their approach to fostering AI startups, though it does not feature direct commentary from Jensen Huang.
"There's a lot of talk about kind of this money round tripping that's going on where essentially Nvidia will give money to companies that are going to just turn around and give the money back to Nvidia to buy GPUs for compute for AI."

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416. The Banker Next Door

Episode: BND: Strategy Room 8-16-2025
Date: 2025-08-17 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a unique deal involving NVIDIA and AMD agreeing to give the U.S. government a 15% cut of AI chip sales to China, highlighting NVIDIA CEO Jensen Huang's meeting with former President Trump and the strategic significance of NVIDIA's AI chips in this context.
"NVIDIA and advanced micro devices have agreed to give the Trump administration a portion of the sales from their artificial intelligence chips to China."

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417. Last Week in AI

Episode: OpenAI's $12B Bet on CoreWeave Stuns Microsoft
Date: 2025-04-19 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic investment in CoreWeave, an AI-focused cloud service provider operating a large fleet of NVIDIA GPUs, highlighting NVIDIA's role and influence in the AI infrastructure market and mentioning its recent product Blackwell that supports AI reasoning.
"NVIDIA owns about 6% of CoreWeave. And essentially, this is an AI specific... They are currently operating over 250,000 NVIDIA GPUs."

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418. Agora - The Marketplace of Ideas

Episode: AWS AI Resurgence
Date: 2025-09-06 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the technical and operational challenges faced by AWS in managing GPU clusters for AI workloads, highlighting NVIDIA's InfiniBand and Spectrum X as industry gold standard interconnect technologies critical for AI model training efficiency. It compares AWS's networking fabric with competitors and emphasizes NVIDIA's leadership in high-performance GPU networking solutions.
"We're talking specifically about industry gold standards like NVIDIA's InfiniBand and Spectrum X... These are essentially super-fast highways for data moving between GPUs, absolutely critical for training large AI models efficiently."

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419. Version History of AI

Episode: OpenAI Drops $12B on CoreWeave, Catching Microsoft Off Guard
Date: 2025-04-19 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's investment in CoreWeave, highlighting CoreWeave's rapid growth in GPU cloud services for AI and Nvidia's approximately 6% ownership stake, noting the broader AI GPU market demand and NVIDIA's product developments such as Blackwell. It provides insight into Nvidia's role as an investor and supplier of GPUs but lacks direct comments from Jensen Huang on NVIDIA's AI strategy, supply chain, or competition.
"This isn't a company that has just kind of come out of obscurity. They're backed by NVIDIA. NVIDIA owns about 6% of CoreWeave."

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420. The Mark Cuban Podcast

Episode: OpenAI's $12B Bet on CoreWeave Stuns Microsoft
Date: 2025-04-19 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's 6% ownership of CoreWeave, an AI-focused cloud service provider heavily using NVIDIA GPUs, highlighting CoreWeave's rapid growth and significance in AI GPU cloud infrastructure. It also notes NVIDIA's new Blackwell GPU product supporting AI reasoning and mentions GPU deployment numbers relevant to the AI training market.

"They're definitely a massive player in the space. And a lot of people are using them to help train their AI models. But they are currently operating over 250,000 NVIDIA GPUs."

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421. AI News Daily

Episode: Clio Secures 5B Funding and Acquires vLex, TSMC Surges on AI Demand, OpenAI Targets Health Care, AI Boom Fuels Silicon Race, and more...
Date: 2025-11-11 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA in the context of AI-driven semiconductor demand, TSMC's supply capacity constraints as NVIDIA's primary chipmaker, and CEO Jensen Huang's comments on potential impacts of U.S. export restrictions fostering Chinese AI chip competition. It highlights industry challenges and growth prospects tied to NVIDIA's AI processor demand.

"Huang warned that U.S. export restrictions could spur China to accelerate rival AI chip development, potentially altering competitive landscapes."

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422. Members Podcast

Episode: Members Podcast - Tuesday 23 September
Date: 2025-09-23 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses significant investments by NVIDIA, including a $5 billion investment in Intel and a $100 billion letter of intent with OpenAI to deploy AI data centers, highlighting NVIDIA's strategic role in AI infrastructure and the broader tech sector.

"This investment and infrastructure partnership marked the next leap forward, deploying 10 gigawatts to power the next era of intelligence."

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423. CXOTalk

Episode: Robots and Physical AI: Strategy and Technology 2025
Date: 2026-01-15 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses advancements in physical AI and robotics, highlighting NVIDIA's role and partnership in this space, particularly their contributions to physical AI capabilities. It also touches on the deployment of robots in manufacturing and workspace scenarios in the next few years.

"What we saw for Nvidia, the physical AI announcement around physical AI and as Nvidia is a good partner for us. We have been on the trajectory with them for a longer time now. But it's amazing to see what is the capability today of physical AI and humanoid."

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424. Heavy Strategy

Episode: HS120: Eight New Year's Resolutions for 2026
Date: 2025-12-09 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's involvement and investment in AI, highlighting its strategic partnerships like with OpenAI and CoreWeave while pointing out potential risks due to circular investments and dependencies in the supply chain. It underscores NVIDIA's central role in the AI hardware ecosystem but also warns of market vulnerabilities that could impact the company and its partners.

"We see, you know, NVIDIA putting money into OpenAI. So OpenAI buys more NVIDIA chips, which it then, you know, gets profits from and reinvests in companies like OpenAI. So they'll buy more NVIDIA chips. Too much circularity. These reciprocal investment and purchase loops are an indicator of a bubble classically."

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425. FinanceFrontierAI: Top 1% Storytelling: Strategies, AI, Finance, Business, Money, Wealth, Mindset

Episode: The AI Infrastructure Arms Race: Geopolitical and Economic Power Shifts
Date: 2025-08-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the critical role of compute chips in the AI infrastructure race, highlighting NVIDIA's AI accelerators powered by chips manufactured predominantly by Taiwan's TSMC, and the geopolitical risks and supply chain shifts influencing the AI hardware market.

"These are the chips that power NVIDIA's AI accelerators and the newest generation of AI data centers."

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426. WSJ What's News

Episode: How China's AI Power Threatens Silicon Valley
Date: 2026-01-18 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode discusses China's AI capabilities in comparison to Silicon Valley, with particular attention on NVIDIA's role in supplying H200 chips to China and the impact of U.S. export policy on this dynamic. It highlights the challenges and strategies around NVIDIA's chip sales in China as well as the broader implications for AI competition and supply chain issues.

"The Trump administration allowing the shipment of H200 chips to China made by NVIDIA with the caveat that NVIDIA has to enter into a revenue sharing agreement."

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427. TechCheck

Episode: TechCheck Takes: China's next breakthrough moment is in AI hardware 1/28/26
Date: 2026-01-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA primarily in the context of Chinese AI hardware firms aiming to challenge NVIDIA's dominance, highlighting domestic companies like MoreThreads and Cambricon as 'homegrown NVIDIA-style' competitors with ambitions to rival or surpass NVIDIA's chip technology. It provides an overview of China's chip industry growth and strategic efforts, including capital raises and technological advancements to reduce reliance on U.S. technology.

"MoreThreads the first, hailed as China's little NVIDIA and founded by a former NVIDIA executive, jumping 400% after debuting on the Shanghai exchange."

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428. Bloomberg Talks

Episode: Michael Intrator Talks Data-Center Delay, Supply Chain
Date: 2025-11-11 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses an agreement between Nvidia and a computing service provider to deliver compute capacity over the next six years with flexibility to reallocate resources to startups, highlighting Nvidia's role in supporting AI infrastructure and ecosystem growth. There is also coverage on supply chain and government facilitation issues impacting growth rate.

""It's a contract that we did with Nvidia where we will deliver them compute for the next six years. In the contract is the capacity to interrupt the flow of compute to them, allowing us to repurpose that compute to new companies, startups.""

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429. Korea JoongAng Daily - Daily News from Korea

Episode: Can Tesla, Apple revive Samsung's struggling chip units?
Date: 2025-08-08 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Samsung's efforts to capture market share in the AI-related High Bandwidth Memory (HBM) segment, particularly targeting NVIDIA's supply chain with aggressive pricing amidst competition from SK Hynix, which remains NVIDIA's largest HBM supplier. It touches on NVIDIA's supply chain dynamics and competitive positioning in memory components critical to AI applications.

"Samsung Electronics plans to focus on securing market share, even at the expense of profit. Considering the long-term growth potential of AI-related HBM demand and the importance of this market, we will continue to focus on securing HBM 3E demand."

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430. Chip Stock Investor Podcast

Episode: NVIDIA's $1B Investment in Nokia: AI's Expansion Beyond the Data Center and the Dawn of 6G
Date: 2025-10-30 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's collaboration with Nokia focusing on the expansion of AI beyond data centers into real-world applications, highlighting NVIDIA's chip design expertise and intellectual property. It also touches upon supply chain aspects and Nokia's role in tech equipment and R&D related to 6G communications.

"NVIDIA primarily in fabulous chip design, as well as plenty of intellectual property and patents on all kinds of stuff at this point."

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431. Schwab Network

Episode: Otto: China Challenge to NVDA, Blackwell & Mega Caps Offer Strength
Date: 2025-05-29 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: Melissa Otto, an industry analyst, discusses NVIDIA's strong recent earnings including a gross margin beat and optimistic guidance, despite challenges related to China and chip restrictions. The market is reacting favorably with shares rising despite a slight sales miss, reflecting confidence in NVIDIA's recovery.

"Where we saw the beat and probably what got the market excited was on the gross margin. Gross margin beat visible alpha consensus by over 100 basis points for Q2."

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432. GoodNightCoffee

Episode: ():AI,AI,ChatGPT
Date: 2025-09-30 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Alibaba's partnership with NVIDIA to integrate AI platforms and NVIDIA's strategic investment of up to $100 billion in AI infrastructure alongside OpenAI. It highlights NVIDIA's significant role in the expansion of AI computing power and infrastructure.

"Chip giant NVIDIA has also entered into a strategic partnership with OpenAI, planning to deploy at least 10 gigawatts of NVIDIA systems. NVIDIA will progressively invest up to 100 billion US dollars for this project."

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433. Sip&Talk| Sunny & Joe

Episode: AI-Driven Economic BlueprintKey Policies and Trends for 2026 EP463Sip&TalkSunny & Joe
Date: 2025-11-17 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in AI hardware, highlighting their high gross margins and leadership in the field, but also points out structural threats such as the falling price of computing power due to technical advances and increased competition from large companies developing their own AI chips. These factors suggest pressure on NVIDIA's pricing power and margin sustainability going forward.

"You can't have that conversation without talking about the king, NVIDIA. They've absolutely defined this whole era. But their dominance, and especially those, I mean, astounding 80% gross margins, they're facing some very real structural threats that point toward normalization."

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434. Schwab Network

Episode: NVDA Faces Growing Competition, $100 Attractive Entry Point
Date: 2025-03-24 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The discussion centers on NVIDIA's current position in the AI chip market, noting its leadership in AI growth but questioning future demand as the market shifts from training to inference chips. The analyst highlights competition from hyperscalers like Google and Amazon developing their own chips, potential deceleration in NVIDIA's growth, and macroeconomic and geopolitical risks affecting the company's valuation.

"We're transitioning to that inference stage of AI, right, from the training. And the question is, do enterprises specifically...really need to spend that much on the most recent, the most powerful NVIDIA chips as they did before for training?"

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435. AI News Daily

Episode: OpenAI Expands ChatGPT Search, Amazon Invests $100 Billion in AI, NVIDIA Doubles Down on AI Investments, Microsoft and G42 Boost UAE AI, and more...
Date: 2025-02-07 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's increased investments in AI software and cloud services, highlighting its strategic focus on developer tools like CUDA and TensorRT, partnerships across key industries, and growth potential in the expanding AI market. Analysts predict substantial revenue growth driven by AI-related products and strategic acquisitions.

"NVIDIA is ramping up its investments in AI software and cloud services, aiming to strengthen its market position and expand its offerings."

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436. (Audio)NEWS/VIEWS/NOVELS

Episode: Chips for Rare Earth: Another Aspect of the US-China Competition
Date: 2025-06-14 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses the impact of US-China trade restrictions on NVIDIA, highlighting CEO Jensen Huang's remarks on the significance of sales in China for maintaining AI technology leadership and his view that the chip bans will not significantly slow China's AI development. It also touches on how NVIDIA adapted by producing the H20 chip to navigate the regulations.

"Nvidia CEO Jensen Huang admitted that sales in China were very important to the company's bottom line. He argued that those sales will provide his company with the support needed to keep it on the cutting edge of AI technology and made a case directly against the ban by announcing that it will do little to slow China's development of AI."

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437. The Quantum AI Digest

Episode: The Quantum AI Digest: 30 December 2025 Daily Dispatch
Date: 2025-12-30 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic moves in AI hardware including a $20 billion licensing deal with Grok, acquisition of Intel shares for joint development, and stockpiling of memory from Samsung and SK Hynix to enhance AI inference capabilities and lower costs. This positions NVIDIA strongly against competition from Google and Amazon.

"NVIDIA is expanding its dominance in AI hardware, securing a record-breaking $20 billion licensing deal with Grok for their high-speed language processing unit technology."

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438. Tech News Daily

Episode: TSMC Surges on AI Demand, OpenAI Targets Health Care, Clio Secures 5B Funding and Acquires vLex, Tesla Hires Shake Up as Cybertruck Slows, and more...

Date: 2025-11-11 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses NVIDIA's role as a primary customer of TSMC amid strong AI-driven semiconductor demand, highlighting CEO Jensen Huang's concerns about US export restrictions potentially accelerating Chinese AI chip development and intensifying competition. It covers industry challenges including rising costs, geopolitical tensions, and capacity constraints, while noting bullish long-term AI growth prospects and volatility due to valuation concerns.

"Huang warned that US export restrictions could spur China to accelerate rival AI chip development, potentially reshaping competition."

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439. AI News Daily - Your Daily AI Briefing in 5 Minutes

Episode: NitroGen Universal Game Agents. Claude Opus 4.5 Extends Horizon. Qwen Image Layered Editing. Chinese Models Overtake US.

Date: 2025-12-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's NitroGen, an open vision action model for gaming agents trained on extensive gameplay data, highlighting its capabilities and success rates, illustrating NVIDIA's advances in AI for gaming. It explains NitroGen's technical foundations and performance advantages over models trained from scratch.

"NitroGen is an open vision action model from NVIDIA for gaming agents, trained on 40,000 hours of gameplay videos demonstrating superior success rates on unfamiliar games compared to models trained from scratch."

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440. LSE: The Ballpark

Episode: LSE: The Ballpark | The US-China AI race with Professor Angela Zhang

Date: 2025-06-30 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses the challenges NVIDIA faces from the emergence of Chinese AI firms like DeepSeq, which reduce the need for extensive AI training and threaten NVIDIA's market share both in software and hardware, particularly affecting advanced chip sales due to evolving market demands and US export restrictions.

"Because DeepSeq open source its model, there is less a need for other countries and other firms to spend tons of resources and money in training AI models... That also challenged NVIDIA's position because DeepSeq and other Chinese AI firms can turn to domestic hardware manufacturers like Huawei for the chip supplies for inferencing tasks."

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441. The AI Policy Podcast

Episode: China's AI Industrial Policy with Kyle Chan

Date: 2025-07-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses China's AI industrial policy focusing on semiconductor and AI chip development as a strategic move to create domestic alternatives to NVIDIA GPUs due to export controls, highlighting challenges faced by Chinese companies in transitioning to domestic chips.

"The Biden administration's AI chip export controls really made crystal clear the relationship between, uh, AI and AI chips, the kind of chips that NVIDIA makes."

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442. AI News Tracker

Episode: "The AI Boom: Unprecedented Investments, Rapid Adoption, and Fierce Infrastructure Race"

Date: 2025-09-23 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast highlights a major new partnership between OpenAI and NVIDIA to deploy AI infrastructure, notes NVIDIA's market value increase supported by multi-billion-dollar deals, and discusses supply chain challenges and competitive dynamics in AI infrastructure. It underscores NVIDIA's prominent role in accelerating AI adoption and maintaining leadership in AI chip supply.

"The space has been defined by the massive new partnership between OpenAI and NVIDIA to deploy at least 10 gigawatts of cutting-edge AI."

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443. The John Batchelor Show

Episode: 86: Chris Riegel, CEO of SCALA.com, states that Chinese claims of matching Nvidia's high-end chip success are largely propaganda, though China mandates domestic chip use. The US holds the AI "pole position." AI is a genuine profit driver, worth trillions to G

Date: 2025-11-14 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses China's mandated use of domestic chips to replace Nvidia's products and assesses claims by Chinese companies about matching Nvidia's AI chip technology, concluding these claims are partly real and partly aspirational. It highlights Nvidia's leading position in AI chips amid competition and geopolitical considerations.

"China now is formalizing it. It is recommending, which means ordering, that all of its internet firms, Alibaba would be an example, must use chips that come from China only and not from outside of China, meaning Nvidia."

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444. Nachrichten

Episode: Nachrichten - 2025-07-16
Date: 2025-07-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia CEO Jensen Huang's announcement to resume sales of the H20 chip in China, highlighting its compliance with US export regulations and positive impact on the Taiwanese semiconductor market, particularly benefiting TSMC and boosting regional stock indices. It also notes new product introductions like the RTX Pro GPU for China, emphasizing Taiwan's role in the global tech industry amid ongoing trade negotiations.

"The announcement by Nvidia-CEO Jensen Huang to resume sales of the H20 chip in China has boosted the Taiwanese economy and stock market, with the H20 being the only high-performance chip legally exportable to China under US regulations."

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445. Moyu-nomics

Episode: Is Cardano's $1 Target Achievable? Key Support Level at Risk
Date: 2025-06-14 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's supply chain strategy, highlighting Foxconn and Wistron's expansion of AI server component production in the U.S., and CEO Jensen Huang's comments on the importance and limitations of domestic manufacturing for supply chain security. It also situates Nvidia's supply chain moves within the broader context of U.S. manufacturing policies and competition in AI server chips.

"NVIDIA CEO Jensen Huang noted while partial U.S. Production is crucial for supply chain security, complete localization remains impractical."

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446. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: 6 Hail Mary's to Get Apple Back in the AI Game
Date: 2025-03-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's comments about bringing a significant portion of NVIDIA's supply chain to the U.S., aligning with U.S. trade policies and supporting domestic chip manufacturing with the TSMC Arizona facility, highlighting the company's strategic response to supply chain risks and AI industry growth.

"Overall, we will procure over the course of the next four years probably half a trillion dollars worth of electronics in total. And I think we can easily see ourselves manufacturing several hundred billion of it here in the U.S."

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447. AI in Marketing

Episode: AI's Ubiquity Explored, OpenAI's Revenue Soars, Amazon's AWS Gains, Nvidia Warns on Huawei
Date: 2025-11-03 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: NVIDIA CEO Jensen Huang warned about Huawei's strength in AI and 5G chip development amidst US trade tensions, acknowledging China's growing self-sufficiency in AI chips and the importance of respecting competition. Huang emphasized the vast potential of the Chinese market and the shifting dynamics in AI technology.

"NVIDIA CEO Jensen Huang has issued a stern warning about underestimating Huawei, emphasizing the Chinese company's strength in 5G and chip development."

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448. The Quantum AI Digest

Episode: The Quantum AI Digest: 24 May 2025 Daily Dispatch
Date: 2025-05-24 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang unveiling the GR00TN 1.5, a new foundation model for humanoid reasoning aimed at advancing NVIDIA's robotics strategy, highlighting the company's bold bet on humanoid robotics as a significant growth area.

"CEO Jensen Huang unveiled GR00TN 1.5, a cutting-edge foundation model for humanoid reasoning, developed in just 36 hours."

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449. Korea JoongAng Daily - Daily News from Korea

Episode: U.S. shift in approach to AI sector could be boom, doom for Korea
Date: 2025-07-27 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses US policy shifts benefiting Nvidia and highlights CEO Jensen Huang's recognition by President Trump, Nvidia's resumed chip exports to China, and its $500 billion AI infrastructure plan in the US involving key partners.

"Trump backs Nvidia U.S. President Donald Trump now appears to favor Nvidia. Speaking at an AI summit in Washington on Wednesday, he singled out CEO Jensen Huang during his address. I said, look, we'll break this guy up, before I learn the facts of life, Trump said. I figured we could go in, and we could sort of break them up a little bit, get them a little competition, and I found out it's not easy in that business. Then I got to know Jensen, and now I see why."

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450. Geek Forever's Podcast

Episode: ! Intel ? | Geek Monday EP307
Date: 2025-12-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses how Intel has faced significant challenges by failing to invest in GPU technology as Nvidia did, which allowed Nvidia to become a leader in GPU for gaming and AI applications, outpacing Intel's late GPU efforts and achieving rapid revenue growth in AI and data center markets.

"With the rapid rise of AI, especially Generative AI, Nvidia has become the leader in GPUs for data centers and AI, leaving Intel struggling to catch up with significantly less effective products."

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451. @HPCpodcast with Shahin Khan and Doug Black

Episode: HPC News Bytes - 20250922
Date: 2025-09-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic $5 billion investment in Intel to co-develop AI-enabled chips for PCs and data centers, highlighting the partnership as a significant industry realignment and its implications for competition with AMD.

"Another week, another major news bombshell from NVIDIA. This time, the news points to a major realignment in the chip industry. NVIDIA invested $5 billion in Intel. As the two companies agreed to a broad technology partnership to co-develop AI-enabled chips for PCs and data centers."

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452. The Six Five with Patrick Moorhead and Daniel Newman

Episode: EP 279: Government Shutdown Blues: Tech Impact and Economic Uncertainty
Date: 2025-10-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The discussion centers on NVIDIA's significant demand for semiconductor capacity, the challenges of relying solely on TSMC, and the potential for a multi-foundry strategy influenced more by policy than technology. It also references NVIDIA's strong sales forecasts through 2027 and the industry dynamics impacting supply chain and competitor strategies.

"If you look at the demand around NVIDIA, like I don't know if TSMC can build capacity fast enough to support what we have as these multi-year forecasts every week, these deals, the amount of size."

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453. Machine Learning: News on AI, OpenAI, ChatGPT, Artificial Intelligence, AI Models

Episode: Weekly AI Recap: Apple, Intel, Nvidia
Date: 2025-10-04 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategic partnership with Intel, involving a $5 billion investment and co-development of AI-related chips, emphasizing NVIDIA's industry dominance and survival strategy in the AI chip market. It highlights how this move reshapes the AI hardware landscape and positions NVIDIA ahead of competitors like AMD.

"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it... Intel is going to build a new x86 CPU customized for NVIDIA's AI infrastructure."

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454. Loop Infinito (by Xataka)

Episode: Una fisura en el plan
Date: 2025-11-27 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses NVIDIA's defensive response to Google's new AI chips and models, highlighting concerns about competition as major clients like Meta and Anthropic consider or commit to Google's TPU chips over NVIDIA's offerings. This indicates changes in the AI hardware landscape and challenges to NVIDIA's leadership.

""NVIDIA, por primera vez desde que empezo esta fiebre de la IA generativa hace tres anos, ha salido a defenderse publicamente... esta vez lo ha hecho con un comunicado directo atacando la inflexibilidad de los chips de Google.""

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455. The Quantum AI Digest

Episode: The Quantum AI Digest: 30 May 2025 Daily Dispatch
Date: 2025-05-30 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA in the context of a significant surge in AI demand, new hardware and software offerings, upcoming CEO statements at a major event, and strategic adaptations to export controls impacting revenue. Partnerships and competition in the AI hardware space are also highlighted.

"NVIDIA reports a staggering 1,000-fold surge in AI demand, driving the need for more data centers or AI factories, with CEO Jensen Huang set to share strategies at VivaTech in Paris on June 11."

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456. Monetary Matters with Jack Farley

Episode: The Era of AI Semiconductor CapEx | Angus Shillington & Nick Frasse (Fireside Chat)
Date: 2025-09-07 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features analysts discussing the semiconductor sector's AI-driven economic cycle with a focus on NVIDIA as the leading GPU company and its dominant role in the AI ecosystem. They analyze market structure, CapEx trends, and competitive positioning relative to NVIDIA, TSMC, and memory suppliers.

"My point on NVIDIA is NVIDIA is a very good read on what's happening in the ecosystem, right? So they're the apex predator of GPUs."

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457. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: Who Thinks There's an AI Bubble?
Date: 2025-08-12 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the negotiations between NVIDIA, AMD, and the US government regarding export licenses for Chinese chip sales, including the agreed revenue share deal and interactions involving Jensen Huang and government officials. It highlights the impact of geopolitical factors on NVIDIA's ability to sell chips in China.

"NVIDIA and AMD have agreed to give the US government 15% of the revenue for Chinese chip sales in exchange for export licenses."

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458. AI Finance

Episode: $20B Nvidia Coup: Licenses Groq, Steals Top Execs
Date: 2026-01-06 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's $20 billion non-exclusive licensing deal with Groq, highlighting concerns about Nvidia's GPU competitiveness compared to TPUs, the high valuation paid, and internal drama related to the deal. The discussion sheds light on Nvidia's strategy and competitive positioning in AI hardware but lacks direct insights from Jensen Huang.

"Nvidia has just signed a $20 billion deal to license technology from Groq, a TPU company. There's a lot of things going on here. Basically, people are saying this is Nvidia admitting that there's no way their GPUs could keep up with TPUs."

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459. Last Week in AI

Episode: Can Nvidia Outsmart the Export Control Game?
Date: 2025-08-09 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the recent arrest of individuals smuggling Nvidia AI chips to China, touching on Nvidia's responses and broader issues related to the US-China AI chip race and export controls. It highlights concerns around chip smuggling and the implications for Nvidia.

"Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were Nvidia chips."

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460. Beurs | BNR

Episode: Beurs in Zicht | 'Geen zekerheidje dat Nvidia verwachtingen overtreft'
Date: 2025-11-16 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses upcoming Nvidia quarterly results, noting strong revenue growth trends though previous quarters slightly missed expectations. The conversation centers on whether Nvidia will continue to exceed forecasts, highlighting significant ongoing market interest in their performance.

"Als ze het nu weer waar weten te maken, wordt het de tiende kwartaal op rij... dat ze in ieder geval kwartaal op kwartaal meer dan 50% omzetgroei realiseren, wat echt enorm is."

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461. Trends mit Teo: Kunstliche Intelligenz & Social Media

Episode: #611: NVIDIA GTC Recap & Interview mit Timo Kistner uber AI, Manufacturing & Robotics
Date: 2025-07-02 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode covers NVIDIA's GTC Paris event, featuring NVIDIA CEO Jensen Huang's keynote on AI trends, his European tour discussing AI and data center expansion with German officials, and insights from an interview with a German NVIDIA representative on AI applications in industrial and manufacturing sectors.

"Jensen Huang was in Europe negotiating a new AI deal with Friedrich Merz, likely concerning the expansion of data centers in Germany."

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462. Founders

Episode: #403 How Jensen Works
Date: 2025-10-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's management philosophy at NVIDIA, emphasizing his focus on continuous innovation, teaching within the company, and the need to avoid complacency in order to maintain competitive edge. It highlights how Jensen instills a

culture of reinvention to stay ahead of emerging competitors.

""Innovation is a necessity, not an option.""

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463. Z sur 7

Episode: Le prix du petrole face a l'instabilite mondiale et les reformes des pensions dans Z sur 7

Date: 2025-06-17 | Relevance: 80/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Nvidia CEO Jensen Huang's recent keynote at VivaTech, highlighting Nvidia's strategic pivot towards Europe and its leadership role in the AI revolution. It underscores Nvidia's market valuation and Huang's influence, as well as the significance of Nvidia's European growth ambitions and partnership with Mistral AI.

"Le patron de Nvidia, Jensen Huang, a enflamme VivaTech la semaine passee. Il a confirme le virage strategique de son entreprise vers l'Europe."

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464. The Jaeden Schafer Podcast: Inspired by Joe Rogan, Lex Fridman, Tucker Carlson

Episode: Nvidia's Latest Numbers Break Historic Records

Date: 2025-11-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings, its bullish CEO Jensen Huang, and the company's investments in AI startups, suggesting ongoing market confidence despite AI bubble concerns.

"NVIDIA continues to just shock people and keeps the market rally going forever."

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465. Countdown AI

Episode: Nvidia Celebrates $57B Revenue as Analysts Sound Alarms

Date: 2025-11-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Nvidia's impressive quarterly earnings, its significant role in the AI industry through investments, and challenges the notion that the AI bubble is about to pop. The host highlights Nvidia's continued market success and bullish outlook from CEO Jensen Huang.

"Nvidia continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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466. Bloomberg Daybreak: Europe Edition

Episode: AI Bubble Fears Rejected, Bumper Bank Earnings, Speedy Trading Showdown

Date: 2025-10-29 | Relevance: 80/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive

Listen to Episode

Summary: NVIDIA CEO Jensen Huang dismisses fears of an AI bubble, emphasizing the company's leading role in AI with its latest chips expected to generate half a trillion dollars in revenue and partnerships with major firms to maintain AI leadership. He highlights the shift to accelerated computing and the increasing intelligence of AI as foundational to sustained growth.

"I don't believe we're in an AI bubble. And the reason for that is we're going through a natural transition from an old computing model based on general purpose computing to accelerated computing."

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467. The Last Invention is AI

Episode: Nvidia's $5 Trillion Shockwave Across Tech

Date: 2025-11-05 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's recent milestone of becoming the first $5 trillion public company largely due to GPU sales in AI, market dynamics including geopolitical tensions over chip sales, and its remarkable stock performance over the last five years.

"Nvidia has just become the first public company in the world to be worth $5 trillion thanks to the sale of its GPU chips largely being used for AI."

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468. Acquired AI

Episode: Decoding Nvidia's Stand on Export Controls: Balancing innovation with regulation

Date: 2025-08-25 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses a recent incident involving smuggling of high-performance AI chips, allegedly NVIDIA's, to China, highlighting NVIDIA's role in the AI chip supply chain amid geopolitical tensions and export controls. The discussion touches on the challenges NVIDIA faces with respect to regulation, export control enforcement, and the impact of these issues on the global AI race.

"Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were NVIDIA chips."

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469. Big Technology Podcast

Episode: Dwarkesh Patel: AI Continuous Improvement, Intelligence Explosion, Memory, Frontier Lab Competition
Date: 2025-06-18 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's AI hardware business, its strong profit margins, competition from hyperscalers building their own ASICs, and the dynamics of supply chain management similar to Apple's strategy. It highlights that while NVIDIA produces great hardware, the market might shift towards custom accelerators by large cloud providers.
""Nvidia profit margins are like 70%. Not bad. ... that just sets up a huge incentive for all these hyperscalers to build their own ASICs, their own accelerators that replace the Nvidia ones, which I think will come online over the next few years.""

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470. Machine Learning Guide

Episode: Nvidia Climbs to $57B Revenue in AI Chip Mega-Cycle
Date: 2025-11-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record-breaking quarterly earnings amid widespread AI bubble skepticism, highlighting CEO Jensen Huang's bullish stance and Nvidia's strategic investments in AI companies fueling the market rally.
"The founder and CEO, Jensen Wang, he seems very bullish."

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471. ChatGPT: News on Open AI, MidJourney, NVIDIA, Anthropic, Open Source LLMs, Machine Learning

Episode: Nvidia's $57B Revenue Extends Its AI Dominance
Date: 2025-11-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-setting quarterly earnings which have surprised many and impacted AI market sentiment. It highlights NVIDIA's ongoing investments in AI companies, the bullish outlook of founder Jensen Huang, and the company's continued influence and dominance in AI technology.
"The founder and CEO, Jensen Wang, he seems very bullish... NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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472. The AI Podcast

Episode: Nvidia Warns Competitors With Record Quarter
Date: 2025-11-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record quarterly earnings and how it is impacting perceptions of the AI market bubble; it also highlights Nvidia's ongoing investments in AI companies and the bullish stance of CEO Jensen Huang.
"The founder and CEO, Jensen Wang, he seems very bullish."

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473. Byted Size News

Episode: Nvidia's NVLink Fusion Launch, Anthropic's AI Blackmail Behavior, Foxconn's $3B UTAC Bid, Amazon Zoox's Second Robotaxi Recall, Monarch's $75M Fintech Surge
Date: 2025-05-23 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's CEO Jensen Huang unveiling the NVLink Fusion technology as a strategic move to maintain Nvidia's central role in AI amid customers reducing spending and market challenges. It highlights how NVLink Fusion allows integration of custom-designed chips into Nvidia's AI infrastructure, facilitating innovation while addressing supply chain and trade restriction hurdles.
""Nvidia, the powerhouse behind the AI chips fueling everything from self-driving cars to chatbots, is seeing some of its biggest customers, think cloud giants like Microsoft and Google, pull back on spending. So what's Nvidia's next move?""

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474. The Jon Sanchez Show

Episode: 09/22- What does Nvidia's $100 billion investment mean for you?
Date: 2025-09-22 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's surprising $100 billion investment into OpenAI, highlighting the scale of the project as a 10 gigawatt initiative and its significance for the future use of AI. The hosts explore the implications of this large investment announcement and its impact on the industry and potential users.
"A $100 billion investment by NVIDIA into OpenAI... This investment is going to be a 10 gigawatt project... something, again, no one has ever seen before."

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475. Wharrysson Lacerda e Eduardo Frumento (Tecnologia)

Episode: 14/10/2025 - Opean AI busca parceria para o furar exclusividade dos chips da Nvidia
Date: 2025-10-14 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in AI hardware and the recent strategic partnership between OpenAI and AMD to challenge NVIDIA's exclusive chip supply. The discussion highlights NVIDIA's CEO Jensen Huang's control over the AI chip

market and OpenAI's move to diversify its chip sourcing through AMD's Instinct line.

""A Nvidia, quando a gente pensa em hardware, nos chips, so que isso, de certa maneira, continua a incomodar a OpenAI e outras empresas porque a Nvidia esta nadando sozinha, ne?""

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476. Do Zero ao Topo

Episode: Por que JENSEN HUANG e o padrinho da inteligencia artificial? - Personalidades #6

Date: 2025-02-14 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast episode provides an in-depth narrative about NVIDIA's meteoric growth, linking it closely to its success in AI chips and highlighting the leadership of Jensen Huang. It traces Huang's background and the company's evolution, emphasizing NVIDIA's significant market value increase tied to AI advancements.

""So de 2023 para ca, a empresa foi de um valor de mercado de 300 bilhoes de dolares para mais de 3 trilhoes de dolares.""

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477. Chip Stock Investor Podcast

Episode: Beyond the GPU: Nvidia's Secret Weapon for AI Inference in 2026

Date: 2026-01-08 | Relevance: 85/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's 2026 AI strategy focusing on full stack compute innovation encompassing chip design, system architecture, manufacturing scale-up such as with the Verorubin chip, and software infrastructure. The host highlights NVIDIA as their top stock pick and underscores the complexity of the supply chain and importance of understanding NVIDIA's integrated approach to AI hardware and software solutions.

"In this era of AI, it's not about individual chip innovation anymore. It's about that full stack compute innovation that NVIDIA likes to talk about everything from chip design to system level design to the actual infrastructure and build of the software itself and all points in between."

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478. In the Money

Episode: Market Strength or AI Hype?

Date: 2025-10-31 | Relevance: 78/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's evolution from a chip maker into a platform leader in AI, highlighting the Blackwell chips and increasing adoption across major tech companies investing heavily in AI infrastructure. It also notes NVIDIA's expansion into data center infrastructure with new business lines like Spectrum X networking and recent positive stock performance signaling growth potential.

"The name that really comes to mind here is NVIDIA because they have really evolved themselves here in the last, call it, couple of years from chip maker into just a platform leader with anything related to AI."

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479. Geek Forever's Podcast

Episode: Bumpgate Apple Nvidia | Geek Story EP594

Date: 2026-02-01 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses the historical relationship between Apple and NVIDIA, focusing on their partnership during the early 2000s, especially around graphics performance in Apple products and the collaboration's eventual souring. It highlights NVIDIA's role in powering Apple's graphics during that era but does not delve deeply into current AI strategy, supply chain, or competition.

"The relationship reached its peak around 2006-2008 with Macs equipped with powerful NVIDIA GPUs like the GeForce 8600 MGT, underscoring NVIDIA's position as a key graphics partner for Apple at the time."

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480. Noon Business Hour on WBBM Newsradio

Episode: Nvidia - Ford Recalls & Walgreens

Date: 2025-08-28 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses Nvidia's recent earnings report, noting strong revenue and earnings beats but a slightly disappointing performance relative to high expectations. The conversation highlights Nvidia's role in the AI-driven growth economy while cautioning that growth rates may be moderating from extremely high levels.

"It wasn't a typical just blow away Nvidia quarter, and hence you're seeing the stock tail off just a little bit today. But I think the results were good, maybe a little disappointing from what people have come to expect from the company."

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481. Marketplace

Episode: Nvidia: Boom or bubble?

Date: 2025-10-29 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's market valuation driven by AI growth and its strategy of investing heavily in AI-related companies, resulting in substantial cash reserves and expansion of its AI ecosystem. Analysts note this aggressive investment approach supports the AI industry's development but also raises concerns about a potential market bubble.

"NVIDIA has made dozens of investment deals just this year. $100 billion in open AI, $5 billion in Intel, and reportedly $2 billion in XAI.

It's funded cloud providers and AI application startups."

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482. ChinaTalk

Episode: NVIDIA GPU Black Market Smuggling
Date: 2025-08-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses the alleged smuggling of NVIDIA GPUs into China, featuring an outsider's investigative effort to track the GPU black market and supply chain challenges amid policy changes. It includes perspectives on NVIDIA's denial of smuggling and insight into the realities of GPU availability despite bans.
""NVIDIA kind of, they almost were baiting, I feel like, a response with the whole like, no, smuggling doesn't happen, and it's a non-starter.""

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483. Rabbit Hole AI

Episode: NVIDIA Halts Certain H200 Exports to China
Date: 2026-01-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses NVIDIA's recent policy change requiring full upfront payment for its advanced H200 AI chips in China, highlighting growing demand across industries and concerns about government restrictions affecting sales. The discussion includes implications for NVIDIA's supply chain and market dynamics in China but does not feature direct comments from NVIDIA executives or detailed AI strategy insights.
"Right now, they are tightening their grip on how their most advanced chips are sold in China. There is obviously a lot of demand for their hardware. It's surging across basically every industry from construction to nuclear fusion, but they're now requiring Chinese consumers or customers, basically a lot of these big organizations, to pay the full cost up front for their H200 AI chips."

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484. Apple News Today AI

Episode: Back in Business: Nvidia and China
Date: 2025-07-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent ability to resume shipping AI chips to China after regulatory restrictions, the impact on Nvidia's revenue, and touches on broader industry context including AI models. It highlights the significance of this regulatory development for Nvidia's business in China.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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485. Capital Intereconomia

Episode: Radar Empresarial: NVIDIA se enfrenta a los reguladores antimonopolio chinos
Date: 2025-09-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the Chinese antitrust investigations targeting NVIDIA's 2019 acquisition of Melanox Technologies. It highlights the strategic value of the acquisition, particularly for AI data center connectivity and server presence, but provides limited new details about NVIDIA's AI strategy or supply chain beyond this context.
""Si, esto es un golpe maestro. He estado sonando con esto. El ordenador mas importante hoy en dia es el centro de datos, es el epicentro de la industria informatica y las aplicaciones mas importantes que se ejecutan en los centros de datos hoy en dia son las aplicaciones de inteligencia artificial y las aplicaciones de analisis de Big Data.""

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486. Bloomberg Talks

Episode: Nicholas Burns Talks Nvidia Blackwell Chips and China
Date: 2025-08-29 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's challenges with export controls related to AI chip sales in China, focusing on US-China relations, the impact of tariffs, and potential scaled-down 'Blackwell' chips for the Chinese market amid geopolitical tensions.
"For three years, U.S. policy has been to deny to China those dual-use exports like advanced chips for AI purposes that might then help the People's Liberation Army to outcompete the United States military."

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487. Becker Private Equity & Business Podcast

Episode: NVIDIA Keeps Rocking & Rolling 1-10-26
Date: 2026-01-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's current market cap, recent investments, strategic moves including chip sales to China, and CEO Jensen Huang's decision to remain in California despite wealth tax concerns. It highlights Jim Kramer's positive view of NVIDIA as a stock worth doubling down on amidst AI industry developments.
"Jim Kramer essentially says that NVIDIA at its current price is cheap."

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488. Tech Update | BNR

Episode: Nvidia waarschuwt opnieuw voor gevaren van locatieverificatie in chips
Date: 2025-08-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's opposition to the U.S. government's proposed chip location verification technology, highlighting concerns that backdoors could lead to security risks and harm trust in American technology. Nvidia publicly urges policymakers to abandon these proposals, emphasizing that their chips contain no backdoors and maintaining Chinese and U.S. policy tensions regarding chip supply.

"En dus benadrukt Nvidia nu nogmaals, in onze chips zitten geen achterdeurtjes en die willen we ook niet."

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489. Markets & Money Today | 2 Min News | The Daily News Now!

Episode: Nvidia Halts H20 Chip Production for China
Date: 2025-08-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia halting production of the H20 AI chip designed for China, speculating on regulatory and market factors influencing the decision amid US-China tech tensions.

"The move follows ongoing tensions between the U.S. and China over technology access and trade, putting both companies and suppliers under increased pressure to navigate legal and economic challenges."

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490. AI Today

Episode: AI Chips Flow Again: Nvidia in China
Date: 2025-07-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of shipping H20 AI chips to China after regulatory challenges, highlighting the significant revenue potential and the complex regulatory environment. It also mentions Nvidia's AI models accessible via AIbox.ai, indicating ongoing innovation and market presence.

""Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... we're going to get into the background of where it's been, why they're able to start shipping this again, what changed and how many billions of dollars this is going to add to Nvidia's overall revenue.""

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491. Geek Forever's Podcast

Episode: ! Jensen Huang Donald Trump ? | Geek Story EP549
Date: 2025-12-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses how Jensen Huang, CEO of NVIDIA, managed to strategically navigate complex geopolitical and trade challenges involving the US and China, including creating a modified chip (H20) to comply with export restrictions while retaining Chinese customers. It also explores his lobbying efforts to shift US government perceptions and the significance of his relationships within political circles.

"" H20... Nvidia ""

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492. After Words

Episode: Stephen Witt, "The Thinking Machine - Jensen Huang, Nvidia, and the World's Most Coveted Microchip"
Date: 2025-04-27 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses the history of NVIDIA and the CEO Jensen Huang's role in building the company's AI platform, highlighting the transition from early gaming hardware to the company's pivotal position in AI technology following the advent of systems like ChatGPT.

"Jensen had built this entire platform that made it work. All of this AI technology, it was all running on his repurposed video game hardware."

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493. Generative AI 101

Episode: AI & Jobs: On Amodei, Huang, & Roose
Date: 2025-06-05 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's views on AI's impact on jobs and its role in transforming workforce skills, highlighting his optimistic stance that AI will drive evolution rather than job losses and bring millions into the workforce by changing how skills are evaluated and used.

"You won't lose your job to AI, you'll lose it to someone using AI."

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494. Squawk Box Europe Express

Episode: Nvidia lines up major chip deals with ROK titans
Date: 2025-10-31 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses a significant deal between NVIDIA and South Korean partners involving over 260,000 Blackwell AI chips worth over $7 billion, highlighting the strategic importance of this partnership and its connection to broader geopolitical relationships. There is mention of NVIDIA's market performance and industry impact, as well as the diplomatic backdrop involving the U.S. and South Korea.

"Nvidia announces a host of deals with South Korean heavyweights deploying more than a quarter of a million blackwell AI chips ahead of CEO Jensen Huang's address to the Apex Summers."

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495. Slate Daily Feed

Episode: TBD | Trump Dips into NVIDIA's Chips
Date: 2025-08-15 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's rise in prominence due to the AI boom, highlighting Jensen Huang's role as CEO and his diplomatic efforts to balance U.S.-China export restrictions. It covers a notable deal Huang made with the Trump administration involving chip sales to China and government license agreements, emphasizing his strategic navigation of political challenges.

""After pressing the Trump administration for months to allow NVIDIA to sell chips to China, Huang agreed to an eyebrow-raising deal. NVIDIA will give a sizable chunk of its chip sales to the U.S. government in exchange for the export licenses to sell them.""

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496. Squawk Box Europe Express

Episode: Markets tepid despite Nvidia earnings beat
Date: 2025-02-27 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's earnings beat and the CEO Jensen Huang's comments addressing competition, particularly concerning low-cost rivals and the performance of their AI reasoning model. Despite strong revenue and earnings beats, Nvidia's stock fell somewhat due to forward guidance that did not meet some investors' high expectations.

""Now speaking to this very channel, the CEO Jensen Huang brushes off concerns around low cost rivals. DeepSeek was fantastic. It was fantastic because it open sourced a reasoning model that's absolutely world class.""

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497. AI News Podcast | Latest AI News, Analysis & Events

Episode: Nvidia's $100B OpenAI Deal in Jeopardy, SpaceX Files for 1M Space Data Centers
Date: 2026-02-01 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Jensen Huang's recent statements clarifying NVIDIA's ongoing investment and partnership with OpenAI amidst rumors of friction and a potentially reduced investment figure. It highlights the strategic importance of the NVIDIA-OpenAI relationship as foundational to future AI infrastructure.

"Huang called reports of friction between the chip giant and the ChatGPT maker complete nonsense."

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498. Closing Bell

Episode: Record Closes For Dow, S&P 500; Deere CFO on Autonomous Push 1/6/25
Date: 2026-01-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses recent bullish commentary on NVIDIA from CES, including CEO Jensen Huang's speeches and comments from the CFO about a backlog exceeding $500 billion. Despite this, shares traded flat, suggesting investors may have already priced in growth expectations. The AI-driven demand for memory chips and related stock movements in the semiconductor sector were also highlighted.

"The CFO also adding in a JP Morgan fireside chat that the $500 billion backlog that they provided earlier last or just late last year that they gave in October is actually too low."

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499. Runway AI

Episode: Nvidia's China Comeback
Date: 2025-10-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's recent ability to resume shipping H20 AI chips to China after regulatory restrictions, highlighting the potential billions in added revenue and the background context of US regulatory challenges. The episode also mentions Nvidia's AI model offerings such as Numatron 70b.

"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo, adding billions to Nvidia's overall revenue."

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500. Countdown AI

Episode: Nvidia Gets Green Light for China Sales
Date: 2025-10-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's recent approval to resume shipping H20 AI chips to China after regulatory restrictions, highlighting significant potential revenue impacts and the regulatory background. It also briefly mentions Nvidia's AI model, Numatron 70B, in the context of a platform offering various AI models.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo...and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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501. The Mark Cuban Podcast

Episode: Nvidia's Sales Recovery in China
Date: 2025-07-21 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of H20 AI chip sales to China after regulatory challenges, highlighting significant revenue implications and changes in US policy. It provides background context and the potential financial impact on Nvidia, emphasizing the strategic importance of this development.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo. This is really crazy numbers."

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502. AI News Briefing

Episode: AI Chips Flow Again: Nvidia in China
Date: 2025-10-13 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's recent restart of shipments of its H20 AI chips to China after regulatory restrictions had previously halted sales, highlighting the significant revenue impact and changes enabling the renewed shipments.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... this is really crazy numbers and the reason why they're back on track is also quite a crazy story."

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503. TechCheck

Episode: AI gets caught in trade war crossfire 04/30/25
Date: 2025-04-30 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang discusses the competitive landscape between NVIDIA and Chinese AI development amidst trade tensions, emphasizing a long-term race and significant Chinese technical capabilities.
"China is right behind us. I mean, we're very, very close. But remember, this is a long term. This is an infinite race. We're going to compete for a long time. And just remember that this is a country with great will and they have great technical capabilities. 50 percent of the world's AI researchers are Chinese."

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504. Rich On Tech AI

Episode: Nvidia Hits Record $57B Revenue as AI Demand Skyrockets
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses Nvidia's record quarterly earnings driven by AI demand, highlighting the company's significant investments in AI startups and the CEO Jensen Huang's bullish outlook. While acknowledging skepticism around the AI bubble, the discussion emphasizes Nvidia's ongoing market impact and financial strength.
"Nvidia continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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505. Morning Brief

Episode: Stocks steady before Fed, Nvidia unveils new chips, Magnificent Seven slide
Date: 2025-03-19 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang unveiling new chips including the Blackwell Ultra Processor planned for late 2025 and a more dramatic upgrade called Vera Rubin in 2026. While the event did not reveal any major surprises, it signals ongoing strategic product development for NVIDIA in AI hardware.
"Each one of these phases, each one of these waves opens up new market opportunities for all of us. It brings more and new partners to GTC. As a result, GTC is now jam-packed."

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506. The Building Financial Fitness Podcast with Junus Eu

Episode: NVIDIA's Dominance in AI and Gaming: A Deep Dive (w/ RealMelTan)
Date: 2025-04-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode discusses NVIDIA's prominence in AI and gaming, comparing its GPUs to competitors like Intel and AMD, and touches on market cap volatility related to competitive developments such as DeepSeq.

"Today our topic is actually about NVIDIA and I really wanted to delve into the technicalities of whether their chips are more important for AI than their competitors like Intel."

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507. AI Insights: AI News, Eyewitness Accounts

Episode: Nvidia's Billion-Dollar AI Startup Fortress Strategy
Date: 2026-01-07 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode analyzes Nvidia's extensive AI investment strategy in 2024, highlighting over 67 venture deals and discussing the financial mechanics behind these investments, such as money round-tripping to buy GPUs for AI compute. It provides an overview of Nvidia's positioning as a dominant player riding the AI wave, though it does not include direct quotes from Jensen Huang or details on supply chain and competition.

"Nvidia has seen explosive growth from all their AI products that followed since ChatGPT first came out over three years ago."

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508. The AI News Daily Brief

Episode: China's AI Chips, UK's AI Strategy, and Meta's Scale AI Investment
Date: 2025-06-09 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's involvement in the UK's AI strategy through the UK Sovereign AI Industry Forum, highlighting NVIDIA's role in supplying Blackwell GPUs to bolster AI infrastructure and research capabilities in the UK. This reflects NVIDIA's strategic positioning in Europe's AI market and partnerships supporting AI growth in public services.

"Nscale plans to deploy 10,000 NVIDIA Blackwell graphics processing units by the end of 2026. Meanwhile, Nebius is launching its first AI factory in the UK with 4,000 NVIDIA Blackwell GPUs."

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509. ChatGPT: OpenAI, Sam Altman, AI, Joe Rogan, Artificial Intelligence, Practical AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave, highlighting the significance of the deal for expanding AI compute capacity and detailing CoreWeave's financial situation and growth plans. The host provides a contextual overview but does not include direct statements from NVIDIA executives.

"$2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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510. The AI Engineer Podcast

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses NVIDIA's $2 billion investment in CoreWeave to expand their AI compute capacity. It highlights the strategic importance of this deal for CoreWeave's growth in AI infrastructure and NVIDIA's role as a data center operator partner.

"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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511. Me, Myself, AI

Episode: How Nvidia is Fighting Back Against Export Controls
Date: 2025-11-07 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast episode discusses recent incidents involving smuggling of Nvidia AI chips to China, the broader geopolitical context of the AI race between the US and China, and Nvidia's responses to calls for security measures like kill switches in their chips amid export control tensions.

"Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were Nvidia chips."

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512. Artificial Intelligence: AI News, ChatGPT, OpenAI, LLM, Anthropic, Claude, Google AI

Episode: How Nvidia is Fighting Back Against Export Controls
Date: 2025-08-09 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a recent incident involving the smuggling of Nvidia AI chips to China, regulatory controversies, and geopolitical implications related to Nvidia's AI chip business amid US-China tensions. The discussion touches on export controls and Nvidia's role but lacks direct input from Nvidia executives like Jensen Huang.

"Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were Nvidia chips."

513. Connecting the Dots

Episode: Nvidia's China Strategy, Blackwell GPU Expansion, and Circle's Blockchain Ambitions
Date: 2025-08-12 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's controversial chip deal with China involving export licenses for AI chips, including negotiations led by Jensen Huang with the U.S. government for a revenue-sharing arrangement. This marks a significant policy shift from previous export restrictions, with questions raised about the legality and business implications of the deal.
"Jensen Huang, NVIDIA's CEO, actually went to the White House, showed diagrams, and argued it down to 15%. That negotiation must have been intense."

514. Latent Space AI

Episode: AWS Silicon Milestone: Billions Earned in AI Chip Sales
Date: 2025-12-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: This podcast episode discusses NVIDIA's dominance in AI chips and acknowledges the growing competition from AWS's own AI chips, highlighting potential cracks in NVIDIA's market monopoly. It includes analysis of AWS's business growth in this area and mentions how AWS uses NVIDIA chips in its cloud services.
"Can anybody stop NVIDIA's AI chip dominance? Most would say no because they're so ingrained."

515. The Everything Feed - All Packet Pushers Pods

Episode: HS120: Eight New Year's Resolutions for 2026
Date: 2025-12-09 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's involvement in the AI industry, particularly its investments in companies like OpenAI and CoreWeave, highlighting concerns about market bubbles and supply chain dependencies affecting NVIDIA's ecosystem.
"We see, you know, NVIDIA putting money into OpenAI. So OpenAI buys more NVIDIA chips, which it then, you know, gets profits from and reinvests in companies like OpenAI. So they'll buy more NVIDIA chips."

516. Global Business

Episode: What's next for China's domestic demand in the 15th Five-Year Plan?
Date: 2025-07-18 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses China's stance on semiconductor supply chains and trade relations impacting NVIDIA, including assurances from China's Commerce Minister to NVIDIA CEO Jensen Huang about an open market and NVIDIA's intent to deepen AI partnerships in China. It also touches on U.S. easing of export restrictions allowing NVIDIA to sell chips to China.
"In a key meeting on Wednesday, Commerce Minister Wang Wintou assured NVIDIA CEO Jensen Huang that China's market will stay open, urging global tech firms to bring cutting-edge products to Chinese consumers. For his part, Huang responded by saying NVIDIA sees great potential in China."

517. Inside Taiwan

Episode: Inside Taiwan 2025: The Year That Changed the Physical Economy and What Comes Next in 2026
Date: 2026-01-02 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's significant valuation spike to $5 trillion during 2025 and frames the year as pivotal for AI infrastructure development, highlighting Jensen Huang's perspective on AI as a platform shift and emphasizing the critical challenge of energy supply for tech growth.
"As Jensen Huang starkly put it, there are no new industries you can grow without energy."

518. The John Batchelor Show

Episode: 38: The US-China Tariff Truce and AI's Market Trajectory Guest: Chris Riegel Chris Riegel discusses the temporary US-China tariff truce and Nvidia's potential re-entry into the high-end AI chip market in China. He notes retailers are currently absorbing tarif
Date: 2025-10-31 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast episode discusses a temporary US-China tariff truce and Nvidia's potential re-entry into the Chinese market for high-end AI chips, highlighting the strategic importance of Nvidia's technology to China's AI ambitions and the broader chip supply chain dynamics.
""The Chinese have a dependence on NVIDIA specifically for very high-end AI chips. So maybe there is a peace within this chip war. Ultimately, though, it still becomes a point of great state competition.""

519. Switched On

Episode: How Smart Chips Are Rewiring the Car Market
Date: 2025-11-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's evolving role from just supplying chips to also providing software for self-driving vehicles, highlighting a strategic shift in the automotive chip market. It mentions NVIDIA's partnerships with Uber and automakers where NVIDIA is supplying both computing power and self-driving software, indicating an expansion down the value chain.

"Most notably is NVIDIA who have recently signed a deal with Uber and a number of automakers whereby NVIDIA is not just going to be supplying computing power and putting that in vehicles. They're actually going to be supplying a lot of the software that does make self-driving decisions."

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520. Farzad Podcast

Episode: Tesla's Samsung Partnership Is A Really Big Deal
Date: 2025-08-01 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's leading position in AI hardware, particularly highlighting the superiority of NVIDIA's Blackwell architecture compared to competitors, and notes the lack of comparable alternatives currently in the market. The speaker compares Tesla's vertical integration approach favorably to Apple's model and describes NVIDIA's hardware platform as unbeatable in this generation, with expectations of further advancements in coming years.

""The NVIDIA hardware solution is unbeatable at this point in time. Like there isn't, there isn't a test, there isn't a dojo equivalent to what Blackwell and Blackwell Ultra is today.""

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521. NatSec Matters

Episode: The Race to Control Global Tech: Craig Singleton
Date: 2025-12-31 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses U.S. semiconductor export controls targeted at limiting China's access to advanced chips, including NVIDIA's H20 chip designed for the Chinese market to comply with these controls. It highlights the geopolitical tensions impacting NVIDIA's supply chain and the strategic considerations around maintaining U.S. leverage.

"Ultimately, at the end of the day here, it does seem like we're developing some sort of like a niche and bespoke series of carve outs for certain companies like NVIDIA."

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522. Know Your Risk Podcast

Episode: kyr 11-25
Date: 2025-11-25 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's current market position, noting a shift due to emerging competition, particularly from Google's TPUs, which may force NVIDIA to adjust pricing and face margin pressures. The speaker mentions taking a small short position amid a debate about NVIDIA's future competitiveness and margin sustainability.

"I do think you can argue that something has changed here with NVIDIA... if they really think about it, what all that matters is what's in the price and what's not. And I think what was in the price of NVIDIA was them dominating chip sales and keeping really robust margins for years to come."

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523. Bloomberg Tech

Episode: Super Micro and Snap Warn of Economic Headwinds, Grab Raises Forecast
Date: 2025-04-30 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's demand concerns linked to Supermicro's delayed orders and includes NVIDIA CEO Jensen Huang's comments on AI infrastructure investment and supply chain strategies during a Capitol Hill appearance.

"In order to produce $500 billion worth of AI infrastructure requires enormous amounts of investment from a lot of different partners. And so we've brought on shore many partners to help us do that. And we're going to have to build our own factories in order to do that."

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524. Schwab Network

Episode: AMD & AVGO's Room to Take NVDA Market Share as A.I. Evolves
Date: 2025-10-21 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: Austin Lyons, a senior analyst, discusses Nvidia as a leading player benefiting from accelerating AI demand, highlighting recent partnerships with OpenAI, Intel, Microsoft Azure, and adoption of their Blackwell GPUs and Spectrum X networking technology.

"TSMC CEO CC Wei basically said the numbers are insane, demand is crazy. And in fact, AI demand they saw as accelerating."

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525. Schwab Network

Episode: Huawei's "Shot Across the Bow" & NVDA "Cards" to Win A.I. Game
Date: 2025-04-28 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses the competitive threat posed by Huawei's efforts to develop AI chips that could compete with NVIDIA's products, particularly in the context of US export controls limiting NVIDIA's access to China. While not viewed as an immediate threat, Huawei's moves are seen as a strategic message challenging NVIDIA's market position in China.

"You can't starve an economy like China of high-end AI chips, quote unquote, and hope that they're not going to come up with some kind of solution."

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526. The Information's TITV

Episode: China Halts Nvidia H200 Chips, Discord's Confidential IPO File, AI Developer Platform | Jan 7, 2025
Date: 2026-01-07 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses China's temporary halt on orders for Nvidia's H200 chips, including exclusive reporting on regulatory developments and implications for the supply chain. It also touches on Jensen Huang's appearance at CES and references a related essay on competitiveness in the AI boom.

"This was a big story that our Asia Bureau published. What did we learn about the regulations of China, what the government is saying and how the situation is evolving?"

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527. The Pour Over AI

Episode: Nvidia's $57B Revenue Ignites AI Market Frenzy
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings, investor enthusiasm fueling continued AI market momentum, and NVIDIA's strategic investment in AI companies, highlighting Jensen Huang's bullish stance on the AI market despite bubble concerns.

"Every single AI company, major AI company I feel like I see these days has raised around. NVIDIA has invested into them."

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528. Midjourney

Episode: Nvidia Boasts $57B Revenue as AI Spending Explodes
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record quarterly earnings and the impact on AI market sentiment, highlighting Jensen Huang's bullish outlook and Nvidia's ongoing investments in AI companies. While it questions if the AI bubble is truly over, it emphasizes Nvidia's continued market strength and significant role in supporting AI startups.

"The founder and CEO, Jensen Wang, he seems very bullish."

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529. The Brian Lehrer Show

Episode: Time's 'Person' of the Year: AI Architects
Date: 2025-12-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Jensen Huang's central role in NVIDIA's transformation from a graphics processor company to a key player in the AI revolution, highlighting his influence in AI infrastructure and geopolitical engagements, including his relationship with Trump. It touches on NVIDIA's foundational role in advancing AI technology but does not deeply explore supply chain or competitive strategy details.

"Jensen Huang has turned NVIDIA into a company that was mostly video game graphics processors and made a big bet on the AI revolution that it would transform basically everything about our world."

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530. The Quantum AI Digest

Episode: The Quantum AI Digest: 25 May 2025 Daily Dispatch
Date: 2025-05-25 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic role in AI infrastructure through partnerships like the $40 billion Oracle investment in NVIDIA chips and the UAE's Stargate initiative. It also highlights Jensen Huang's unveiling of the advanced GR00T-N1.5 humanoid reasoning model at Computex, indicating significant AI innovation and company leadership in the space.

"At Computex, CEO Jensen Huang unveiled the GR00T-N1.5 model, an advanced foundation for humanoid reasoning developed in just 36 hours."

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531. China In Focus

Episode: Lutnick: U.S. Swaps Nvidia Chips for Chinese Rare Earths- China in Focus
Date: 2025-07-17 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: NVIDIA CEO Jensen Huang shared his perspective on China's rapid progress in AI technologies and models during a discussion focused on US-China trade, rare earth materials, and the strategic competition in AI. The podcast reflects on geopolitical and industrial aspects impacting NVIDIA's operations and market position.

"China is moving incredibly fast because the model layer with DeepSeq and Alibaba QN and Moonshot, Kimi, Kimi, right? All excellent technologies."

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532. The Straits Times Podcasts

Episode: S2E36: China's leverage on the trade war with US
Date: 2025-07-24 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's AI chip sales to China, particularly the H20 chips which are less advanced than their flagship products, as part of trade negotiations involving rare earth elements between the US and China. Jensen Huang's presence at a supply chain expo is noted, highlighting NVIDIA's role amid these geopolitical trade dynamics.

"Earlier this week, it was reported that Nvidia will be allowed to resume the sale of H20AI chips to China soon."

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533. TechLinked

Episode: Nvidia N1X imminent, AI Bubble Wobbles, Sony Bravia run by TCL + more!
Date: 2026-01-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the imminent release and roadmap of Nvidia's ARM-based N1X laptop CPU, its significance in the competitive laptop CPU market, as well as some historical context on Nvidia's Tegra CPUs and commentary on the AI industry environment.

"Nvidia's N1X ARM-based laptop class CPU was recently spotted in a shipping manifest for an unreleased Dell laptop, reigniting hype for the world's most valuable company to enter a new market."

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534. Digital Dragon Watch: Weekly China Cyber Alert

Episode: Silk Typhoon APT Strikes Again Exploiting Zero-Days While US and China Face Off in Chip Wars
Date: 2025-08-24 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses allegations of China restricting NVIDIA's H20 chip orders amid US-China trade tensions and notes NVIDIA CEO Jensen Huang dismissing security concerns, highlighting broader geopolitical and supply chain implications in the semiconductor sector.

"NVIDIA CEO Jensen Huang is outright dismissing security concerns, but underlying all this is a push for Chinese chip self-sufficiency."

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535. Sinobabble

Episode: Tariffs, Tik Tok, TSMC | China news discussion #1 | 20th April 2025
Date: 2025-04-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's surprise visit to Beijing amidst US restrictions on chip sales to China, touching on the impact of these restrictions on NVIDIA's earnings and stock performance.

"NVIDIA's CEO makes a surprise visit to Beijing after US restricts chip sales to China. Jensen Huang causes a stir on social media and is reported to have met founder of AI company DeepSeek."

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536. Headline News

Episode: Coalition agrees on binding security guarantees for Ukraine
Date: 2026-01-06 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Nvidia CEO Jensen Huang discussed the rapid rise of open-source AI models and announced that the company's Rubin AI computing platform is in full production, highlighting the vital role of Chinese and Chinese-linked partners in Nvidia's supply chain and system-building ecosystem. He framed the next stage of AI development as a period of accelerated deployment across industries and economies.

"Nvidia CEO Jensen Huang has highlighted the rapid rise of open-source AI models such as DeepSeq R1 and revealed that the chipmaker's Rubin AI computing platform is in full production."

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537. 15Mins Today

Episode: Ep. L048: Unprecedented Chip Deal Between US and China
Date: 2025-08-24 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: This podcast episode discusses a new deal whereby NVIDIA and AMD have agreed to pay the US government 15% of their revenues from chip sales to China, a significant shift allowing AI chip exports despite previous bans. It highlights Jensen Huang's lobbying efforts leading to this arrangement and touches on the controversy around monetizing national security decisions.

"NVIDIA and AMD agreed to pay US government 15% of Chinese chip revenues as part of an unprecedented trade arrangement allowing AI chip sales to China despite previous security bans."

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538. AI in Marketing

Episode: AI's Impact: From Writing Styles to Spotify Wrapped and Virtual Influencers' Rise
Date: 2025-12-04 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discussed the uncertain future of AI and its national security implications on The Joe Rogan Experience podcast, emphasizing the unknown trajectory of AI development and the importance of U.S. leadership in the AI race. He also commented on AI's impact on jobs and praised efforts to secure critical technology and jobs in America.

"I don't think anybody really knows."

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539. Schwab Network

Episode: NVDA Bellwether Earnings, AMD "Potential Threat" & MSFT, OpenAI Symbiosis
Date: 2025-11-17 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: Daniel Rubino provides an analyst's perspective that NVIDIA remains strong in AI hardware with significant revenue from AI servers, but faces challenges such as limited access to China and potential impacts from the GAINS Act. Despite current high valuation concerns and geopolitical risks, NVIDIA's momentum and recent deals suggest ongoing strength, though future market shifts are uncertain.

"'NVIDIA is in a very strong position because of their leadership in this space, especially when it comes to hardware and the deals that they often make.'"

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540. Broken Silicon

Episode: 346. Nvidia GPUs Dry Up, Intel Panther Lake Reviews, Nova Lake 2026, AMD R7 9850X3D
Date: 2026-01-27 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses significant supply shortages of NVIDIA GPUs, including the apparent end-of-life status of some models like the 5070 Ti and 5060 Ti 16GB, supported by reports from retailers and hardware reviewers. The hosts also note the mixed reactions within the community and difficulties in NVIDIA's communication about shipment volumes.

"Tim from Hardware Unboxed revealed that NVIDIA has essentially wiped off 5070 Ti from the market, confirmed by Asus PR as end-of-life, and severe shortages affecting the 5060 Ti 16GB as well."

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541. Schwab Network

Episode: AI "Accountability Phase:" Fundamentals Stay Strong Despite Soured Sentiment
Date: 2026-01-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's current AI chip shipments facing tighter US export restrictions to China but maintains that NVIDIA's primary growth comes from US hyperscalers and allied markets investing heavily in AI infrastructure, indicating the AI demand story remains strong despite geopolitical challenges.

"I don't think it changes the bigger picture because China isn't NVIDIA's primary growth engine. The real demand that we're still seeing, it's coming from U.S. hyperscalers, it's coming from allied markets that are spending aggressively on AI infrastructure."

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542. Tech&Co, la quotidienne

Episode: Puces d'IA : AMD signe avec OpenAI - 06/10
Date: 2025-10-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the AI chip race highlighting NVIDIA's role in training AI models with powerful GPUs, contrasting it with AMD and Intel's focus on inference processors. It notes NVIDIA's strength in compute power but also mentions that OpenAI's demand exceeds NVIDIA alone, implying supply constraints and differentiation in AI chip applications.

"NVIDIA, c'est vraiment pour la partie entrainement. Donc, avec puissance de calcul demultipliee, un bus ultra rapide entre toutes les puces, enfin, tout ce qu'on peut imaginer de ces puces ultra puissantes."

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543. Tech Updates

Episode: Episode 255 - Cyera's $9B, Anthropic's mega-round, Wenrix acquired, plus meme stocks & GPUs.
Date: 2026-01-08 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's absence of new hardware announcements at CES, Jensen Huang's focus on AI business during his keynote, and the introduction of software upgrades like DLSS 4.5 improving upscaling technology. No new GeForce 50 series GPUs were revealed, highlighting a strategic shift towards software enhancements rather than hardware launches.

"Jensen Huang, NVIDIA's CEO, gave this 90-minute keynote, which, by the way, felt a bit under-rehearsed compared to his usual rockstar performances. He usually has that leather jacket energy. Exactly! But this time, he spent the entire keynote talking about their dominant AI business."

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544. Notas con audio

Episode: La guerra silenciosa de los microchips: geopolitica y poder en la era de la IA
Date: 2025-09-01 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's position as a market leader in AI chips, its sales to China permitted under the U.S. government's oversight, and the impact of U.S. government policies on the semiconductor industry, highlighting NVIDIA's strategic role in the AI chip race and its competitive landscape with Intel and AMD.

"A principios de agosto, Trump permitio que NVIDIA pueda vender chips a China. La compania liderada por Jensen Huang hoy es la lider del mercado y supo aprovechar la oleada de la IA para posicionar sus chips mas poderosos, superando a Apple y Microsoft para convertirse en la empresa tecnologica mas valiosa del mundo."

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545. Better Offline

Episode: The Enshittifinancial Crisis: Part Two
Date: 2026-01-21 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast segment discusses NVIDIA's announced $100 billion strategic partnership with OpenAI to build data centers, the skepticism around the feasibility and financial mechanics of the deal, and analyst reactions regarding NVIDIA's role as backbone for AI infrastructure and its stock response.

"NVIDIA announced what they called a strategic partnership to invest up to $100 billion and build 10 gigawatts of data centers with OpenAI, with the first gigawatt to be deployed in the second half of 2026."

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546. Gardez une tendance d'avance sur les marches avec Swissquote

Episode: Le KRACH n'aura pas lieu, Nvidia atomise TOUT ! (mais) | Morningbull : le reveil marches
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The speaker discusses Nvidia's strong quarterly results, dismissing fears of an AI bubble and highlighting Nvidia's continued market leadership and optimistic outlook as conveyed by their CFO.

"Nvidia a mis tout le monde d'accord en quelques points. Premier point, il n'y a pas de bulle, juste une transformation massive et generalisee."

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547. Closing Bell

Episode: Closing Bell Overtime: NVIDIA's OpenAI Bet; Chinese Retail Rally; and Global Market Drivers 9/22/25
Date: 2025-09-22 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's significant investment of up to $100 billion in OpenAI for AI infrastructure, highlighting the positive market reaction with NVIDIA's shares hitting an all-time high. Jensen Huang describes this as the biggest AI infrastructure project ever, reinforcing strong AI demand as a market driver.

"CEO Jensen Huang calls the deal the biggest AI infrastructure project ever and says it should be all additive, meaning the deal wasn't priced into estimates."

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548. Redefining Society and Technology Podcast

Episode: CES 2026: Why NVIDIA's Jensen Huang Won IEEE Medal of Honor | A Conversation with Mary Ellen Randall, IEEE's 2026 President and CEO | Redefining Society and Technology with Marco Ciappelli
Date: 2026-01-08 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast highlights NVIDIA's CEO Jensen Huang receiving the IEEE Medal of Honor for his influential work in AI hardware and ecosystem development. It acknowledges NVIDIA's transition from a gaming graphics card company to a critical contributor in AI across different sectors such as healthcare.

"This year's Medal of Honor winner... is Jensen Huang. He has a beautiful career of innovation and is very influential in AI, not just the hardware... but also the ecosystem that NVIDIA is providing to enable AI advancement."

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549. The Times Tech Podcast

Episode: Who holds the power in the age of AI?
Date: 2025-11-07 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features an interview with Jensen Huang, Nvidia CEO, discussing the company's pivotal role in the AI computing boom and the incredible value growth due to its chip technology powering AI developments. It highlights Nvidia's market dominance and financial success amid the AI race.
""That's, of course, Jensen Wang, the CEO of NVIDIA, the company making the chips that power this whole boom... the company's stock prize, which has gone up so much that last week, the company became the first company on planet Earth worth $5 trillion.""

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550. Runway AI

Episode: Nvidia's Chip Demand Hits All-Time High
Date: 2025-11-20 | Relevance: 80/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings and its impact on AI bubble concerns, highlighting NVIDIA's strategic investments in AI companies and the ongoing market rally. The host portrays NVIDIA and its CEO Jensen Huang as bullish and influential in the AI sector's growth.
"NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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551. Tech Brew Ride Home

Episode: Nvidia And Intel Get Together
Date: 2025-09-18 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the newly announced partnership between NVIDIA and Intel to co-develop multiple generations of x86 CPUs integrated with NVIDIA RTX graphics, along with NVIDIA's $5 billion investment in Intel, highlighting collaborative efforts targeting consumer gaming PCs and AI data centers. While detailed product timelines or strategic insights from Jensen Huang are not provided, the segment offers substantive information on NVIDIA's strategic alliance with Intel.
"NVIDIA and Intel this morning announced a partnership to develop multiple generations of x86 products, including CPUs fused with NVIDIA RTX graphics chiplets, and NVIDIA will buy $5 billion of Intel stock to seal the deal."

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552. Wirtschaftsnews

Episode: Grafikkarten-Hersteller NVIDIA legt Zahlen vor
Date: 2025-08-28 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong quarterly financial results, highlighting significant revenue and profit growth driven by high demand for AI-related chips, though noting a slight underperformance in the data center segment leading to a minor stock dip. Overall, it portrays NVIDIA as a leading player in the AI chip market with positive future outlooks.
"Das Unternehmen liefert genau die Hochleistungschips, die es fur Anwendungen mit kunstlicher Intelligenz braucht und gilt als Seismograph fur Zustand und Aussichten der Chip-Branche."

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553. Becker Private Equity & Business Podcast

Episode: Is NVIDIA Undervalued? 12-16-25
Date: 2025-12-16 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's high market valuation, impressive free cash flow, and strong growth rates compared to other leading tech companies, suggesting it may be undervalued despite a high market cap.
"NVIDIA is valued at about $4.5 trillion with a free cash flow of $85 billion a year, and although it has a high P/E ratio of 45, its forward P/E is about 25, reflecting tremendous revenue and profit growth."

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554. Becker Business

Episode: Is NVIDIA Undervalued? 12-16-25
Date: 2025-12-16 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's high market valuation, comparing its growth and free cash flow to other major tech companies. The host reflects on articles suggesting NVIDIA may be undervalued despite its already massive market cap and strong financial metrics.
""NVIDIA is valued at about $4.5 trillion... $85 billion a year in free cash flow, which is a remarkable number... its growth rates are still incredibly fast, at least at this point.""

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555. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: NVIDIA Restricts China H200 Chip Sales
Date: 2026-01-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's new policy requiring upfront full payment for their advanced H200 AI chips in China, highlighting their tightening grip on this market amidst surging demand across various industries.
"NVIDIA is tightening their grip on how their most advanced chips are sold in China, requiring customers to pay the full cost up front for their H200 AI chips."

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556. AI Investing: for the AI Investor

Episode: $20B Nvidia Power Play: Groq LPUs + Top Brass
Date: 2026-01-06 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic $20B non-exclusive licensing deal with Groq, highlighting industry perspectives that suggest NVIDIA is adapting its AI hardware strategy amid competition from TPUs. The episode also touches on the valuation controversy surrounding the deal and NVIDIA's decision not to acquire Groq despite hiring its founder.
"Basically, people are saying this is Nvidia admitting that there's no way their GPUs could keep up with TPUs."

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557. Rob Black Show

Episode: Nvidia Information You Should Know
Date: 2025-09-19 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's stock performance in the context of the AI boom and compares it to other AI and infrastructure-related stocks. It highlights that NVIDIA's stock gains have slowed relative to peers, touches on the declining costs of GPU rentals, and emphasizes the broader ecosystem supporting AI workloads.
"Since ChatGPT was introduced back in November, of 2022, Nvidia has gone up 982%. Not too shabby. Nvidia's footing has already looked increasingly shaky, though, in recent weeks compared to other AI-linked stocks."

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558. The Jaeden Schafer Podcast: Inspired by Joe Rogan, Lex Fridman, Tucker Carlson

Episode: Nvidia Gets Green Light for China Sales
Date: 2025-07-21 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's regulatory challenges with U.S. restrictions on chip sales to China and its recent announcement allowing Nvidia to resume shipments, which is expected to add significant revenue. It highlights the impact on Nvidia's business and provides background on the regulatory environment.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

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559. Taiwan This Week

Episode: A president's first year office and a CEO's big announcements
Date: 2025-05-23 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's announcement of the company's new regional headquarters in Taipei, highlighting significant investment and expansion in Taiwan due to growing engineering teams. It reflects NVIDIA's strategic growth in the region but does not deeply cover AI strategy, supply chain, or competition.
"NVIDIA CEO, Jensen Huang, announced that his company has selected Beito Sherlin in Taipei for its new overseas headquarters, named the NVIDIA Constellation."

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560. Headline News

Episode: Chinese chips are advancing quickly: Nvidia CEO
Date: 2025-07-16 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Nvidia CEO Jensen Huang discusses the advanced AI models in China and how Nvidia's H20 hopper architecture is well-suited to meet the high processing demands, while acknowledging strong competition. He also announces the U.S. government lifting the export ban on Nvidia's H20 chips.
"The AI models recently has advanced very greatly. DeepSeq R1, Alibaba's QN, Moonshot, and these models are very advanced and the inference requirement, the processing requirement is very high. And Nvidia's H20 hopper architecture is really ideal for that. And the demand is so great across all of the services. Of course, we have a lot of competition, so we have to work hard."

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561. Moyu-nomics

Episode: Danieli's Four Groundbreaking Green Technologies Empower Steel Industry's Low-Carbon Transition
Date: 2025-08-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses a report that Nvidia has agreed to share 15% of its semiconductor sales revenue in China in exchange for export licenses, particularly for its H20 AI chips, highlighting regulatory and geopolitical challenges. Concerns are noted from US officials about the military implications of these chips, while Nvidia denies such claims and emphasizes compliance.

"Nvidia accused of trading 15% H20 revenue for export licenses to China."

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562. Your Money Briefing AI

Episode: Nvidia's Sales Recovery in China
Date: 2025-10-13 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's resumption of shipping AI chips to China after regulatory hurdles, highlighting the potential for significant revenue gains and the background of the situation.

"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo."

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563. FDD's Foreign Podicy

Episode: Nvidia Games: China v. the US in AI Arms Race
Date: 2025-08-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses U.S. national security concerns related to the lifting of the export ban on Nvidia's H20 chips to China, emphasizing the AI arms race between the U.S. and China and the strategic implications of Nvidia's technology potentially aiding China's military AI development.

"Our experts are worried about President Trump's recent decision to lift a ban on the export of Nvidia's H20 chips to Beijing."

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564. Practical: AI & Business News

Episode: The Truth Behind Nvidia's Export Control Strategy
Date: 2025-08-09 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent incidents involving smuggling of NVIDIA AI chips to China, the political and regulatory drama around export controls, and the company's stance amid concerns over chip security and international trade tensions. It touches on the broader context of the US-China AI race and NVIDIA's role in the chip supply chain.

"Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were NVIDIA chips."

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565. This Week in Machine Learning

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI computing infrastructure, highlighting the strategic significance of this deal for NVIDIA's AI capabilities and data center partnerships.

"$2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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566. AI Insights: AI News, Eyewitness Accounts

Episode: OpenAI Invests Billions in CoreWeave, Microsoft Didn't See It Coming
Date: 2025-04-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's involvement with CoreWeave, highlighting NVIDIA's 6% ownership and the extensive use of NVIDIA GPUs (250,000+) by CoreWeave for AI model training. The episode touches on NVIDIA's GPU supply growth and the introduction of their new AI product, Blackwell, in the context of AI cloud infrastructure and competition.

""This isn't a company that is just kind of come out of obscurity. They're backed by NVIDIA. NVIDIA owns about 6% of CoreWeave.""

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567. @HPCpodcast with Shahin Khan and Doug Black

Episode: HPC News Bytes - 20250428
Date: 2025-04-28 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's chip manufacturing and packaging strategies, including their use of TSMC's advanced 4NP process for Blackwell chips and collaboration with packaging companies in Arizona. It highlights NVIDIA's shift from a single large chip to multi-chip modules requiring advanced packaging technology.

"NVIDIA mentioned working with Amcor and SPELL for Blackwell chip packaging and testing in Arizona, using TSMC's 4NP process, an advanced version of their N5 5nm process, expected to be about 10% faster."

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568. The Last Invention is AI

Episode: CoreWeave Gets $12B from OpenAI - Microsoft in Disbelief
Date: 2025-04-19 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses CoreWeave's significant GPU resources, its financial growth, and NVIDIA's 6% ownership stake in CoreWeave, highlighting NVIDIA's role in AI cloud services and GPU supply but without direct comments from Jensen Huang or detailed NVIDIA strategy.
"This isn't a company that has just kind of come out of obscurity. They're backed by NVIDIA. NVIDIA owns about 6% of CoreWeave."

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569. Latent Space AI

Episode: Exploring Nvidia's Stand on Export Controls: Walking the fine line between profit and policy
Date: 2025-08-18 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the arrest of individuals smuggling Nvidia AI chips to China, the surrounding controversy over export controls, calls for security measures in Nvidia chips, and Nvidia's response amidst US-China competition narrative.
"People are asking NVIDIA to put kill switches and backdoors in their chips. NVIDIA has responded, the White House is weighing in."

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570. Members Podcast

Episode: Members Podcast - Wednesday 19 February
Date: 2025-02-19 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses upcoming NVIDIA results and highlights analysts' positive outlook on NVIDIA's AI strategy, R&D spending, and growth in earnings from its CUDA software platform. It also mentions new product launches and competitive advantages in GPU deployment costs.
"Bank of America call it their top pick for long-term exposure to AI. Morgan Stanley is also writing them up ahead of results, talking about their dominance in the long term thanks to cost efficiency, solid R&D, $16 billion per annum more than anyone else they're spending on R&D."

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571. The Everything Feed - All Packet Pushers Pods

Episode: HS120: Eight New Year's Resolutions for 2026
Date: 2025-12-09 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's involvement in the AI industry, highlighting its investments in companies like OpenAI and CoreWeave, the circular investment loops in AI ecosystems, and potential risks stemming from supply chain and deployment delays. It provides insight into how these factors could impact NVIDIA and its invested companies' stock performance, though without direct quotes from NVIDIA executives.
"So we see, you know, Nvidia putting money into OpenAI. So OpenAI buys more Nvidia chips, which it then, you know, gets profits from and reinvests in companies like OpenAI. So they'll buy more Nvidia chips."

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572. The Quantum AI Digest

Episode: The Quantum AI Digest: 15 August 2025 Daily Dispatch
Date: 2025-08-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast touches on NVIDIA's use in AI training and their emphasis on physical AI at SIGGRAPH 2025, highlighting updates to their Metropolis platform and RTX Pro 6000 Blackwell Server Edition graphics cards. It also mentions competitors like Huawei's Ascend chips facing challenges and NVIDIA's role in training AI models.
"NVIDIA used SIGGRAPH 2025 to emphasize physical AI, highlighting neural rendering, world simulation, synthetic data, and reasoning agents that bridge digital and physical environments."

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573. Switched On

Episode: Beyond the Chip: Rewiring Data Center Supply Chains
Date: 2026-02-04 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses data center cooling technologies, specifically liquid cooling, highlighting its importance for dense GPU racks like those used by NVIDIA in AI data centers and its benefits in terms of energy and water savings. There is a mention of NVIDIA GPUs as part of the transition to higher-density racks.
"It's like when you talk about a rack, it's kind of that big metal shelf where like it used to be a HPE server. Now it's an NVIDIA GPU that costs millions of dollars."

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574. Shared Everything

Episode: Beating the Flash Crunch With Efficiency, Not Supply
Date: 2026-01-03 | Relevance: 70/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The discussion centers on AI-driven demand for GPUs and data infrastructure, emphasizing NVIDIA's role in addressing increased demand through supply constraints and cost efficiencies, highlighting a positive outlook on AI growth and data generation.
"People talk about it a lot with AI. Like, you know, the assumption is there's like a fixed amount of kind of demand for AI in the world. And what a lot of the AI companies and organizations like NVIDIA have theorized is that, and have kind of shown, you can kind of chart it out now, that as the cost of AI decreases, people use it more."

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575. Bloomberg Talks

Episode: Fastenal CEO Dan Florness Talks Earnings
Date: 2025-10-13 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's position in the AI semiconductor market, highlighting how OpenAI currently relies heavily on NVIDIA GPUs for compute but is diversifying its supplier base by also procuring custom silicon from Broadcom. It compares NVIDIA's generic AI chips to custom silicon like Google's TPUs, emphasizing NVIDIA's leadership but acknowledging competitors.
"OpenAI is not looking to sell its own chips to compete with NVIDIA. It's looking to use its chips for its own ChatGPT app or any other custom app that it has developed in-house."

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576. Investing Experts

Episode: Tech stocks - focus on what management isn't talking about
Date: 2025-05-14 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses the market perception of NVIDIA stock and highlights potential risks related to upcoming ASIC competition and supply chain impacts from tariff policies. It also references NVIDIA's financial write-offs linked to licensing agreements and supply chain issues under political trade tensions.
"Nvidia isn't what Nvidia was a year ago or two years ago even. The ASIC coming in next year, that could be kind of a threat to that market share because you'll see more inferencing workloads move over there."

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577. Good Revenue News

Episode: Autos, AI, and Trade Are Colliding at Once
Date: 2025-12-23 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the impact of U.S. tariffs and geopolitical tensions on the supply chain for automotive chips, with specific mention of NVIDIA's AI chips being accessed by China despite sanctions. It highlights concerns about indirect access to NVIDIA's high-end Blackwell chip and U.S. government investigations into companies circumventing export controls.
"China continues to do everything it can to access AI chips that are very high end in contravention of U.S. sanctions... Tencent is gaining indirect access to NVIDIA's most powerful chip, the Blackwell chip, through a Japan-based cloud provider."

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578. Riskgaming

Episode: How compute and AI will create next-gen superapps
Date: 2025-09-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the interplay of hardware and software efficiency in AI systems, highlighting NVIDIA's role with its Blackwell chip and the broader challenges in system-level efficiency and utilization in AI infrastructure. It notes NVIDIA's achievements and ongoing opportunities for improvement, referencing the company's position within the evolving AI compute landscape.
"NVIDIA has done a great job with Blackwell, but I think there's greater improvements to be made."

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579. World Insight with Tian Wei

Episode: Decoding China's foreign trade and U.S. tariffs
Date: 2025-08-08 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's role in the semiconductor industry, emphasizing its high profit margins and the misunderstanding of trade statistics relating to chip manufacturing and design. It highlights NVIDIA as a leader in AI chip design with significant intellectual property value despite manufacturing being located in East Asia.
"For each $100 sales of NVIDIA, it pocketed $72. That basically means it earns 72% gross profit from each $100 sales."

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580. CNA Talks: A National Security Podcast

Episode: Competition Between the US and China Enters a New Phase
Date: 2025-09-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses U.S. export restrictions on NVIDIA's AI chips, particularly the H20 and H100 models, the implications of these licensing requirements on the supply chain and AI developments, and mentions comments from NVIDIA's CEO Jensen Huang regarding past approvals and China's national security reviews.

"NVIDIA's CEO, Jensen Huang, reported that the Trump administration had given the company approval to sell the H20 chip to China."

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581. The Age of Transitions

Episode: Not So Fab CHIPS Acts on the World Stage, AoT#458
Date: 2025-04-27 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the impact of U.S.-China trade tensions on the AI chip market, focusing on Huawei's new AI chip as a potential alternative to NVIDIA's GPUs in China. It highlights NVIDIA's critical role in AI hardware but notes the challenges posed by geopolitical factors and supply chain constraints.

"NVIDIA is not available in China anymore, if America, the U.S. would like everybody to believe that China needs NVIDIA and that there's no way that they can do"

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582. AI News Daily

Episode: Anthropic Launches New AI Plan, Congress Introduces NO FAKES Act, Google Launches Firebase Studio, Milestone Acquires Brighter AI, and more...
Date: 2025-04-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's collaboration with Milestone Systems on Project Hafnia, highlighting the integration of Brighter AI's technology to enhance privacy and traceability in video training data, and mentions NVIDIA's partnership with Google Cloud to deploy agentic AI capabilities using Gemini models and NVIDIA's infrastructure. The developments underscore advancements in responsible AI and enterprise security.

"Milestone Systems, part of the Canon Group since 2014, is collaborating with NVIDIA on Project Hafnia, aiming to enhance the traceability of video training data by incorporating Brighter AI's technology."

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583. The a16z Show

Episode: H20s to China + 15% with Chris Miller and Lennart Heim
Date: 2025-08-14 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the NVIDIA-designed H20 chip as a strategic response to export controls, detailing its technical specs, regulatory challenges, and recent US export bans implemented via informal letters during the Trump administration.

"The H20 is this chip which NVIDIA designed as a response to export controls in 2023... it maxed out the specifications which are not controlled, memory bandwidth, so putting on the best high bandwidth memory the world currently has on this chip and created an export control compliant chip."

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584. Silicon Siege: China's Tech Offensive

Episode: Silicon Siege: China's Tech Moves Make Sun Tzu Blush
Date: 2025-08-08 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses allegations of industrial espionage involving NVIDIA's AI chips being trafficked to China, supply chain concerns, and accusations from China against NVIDIA for including surveillance features in their chips, with CEO Jensen Huang denying the claims.

"NVIDIA's CEO Jensen Huang gave it the side-eye, denying everything and declaring that"

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585. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses U.S. efforts to boost AI manufacturing and mentions NVIDIA CEO Jensen Huang praising President Trump's initiatives to make American technology dominant globally, highlighting the importance of resilient supply chains and domestic manufacturing. It ties NVIDIA to broader national AI strategy and manufacturing goals.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States, he said at a May 24th Swedish event. Manufacturing in the United States, securing our supply chain, having real resilience, redundancy, and diversity in our manufacturing supply chain, all of that is excellent."

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586. Bloomberg Tech

Episode: Nvidia Puts Another $2B Into CoreWeave, Offers New Chips
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand their partnership and accelerate AI infrastructure build-out, highlighting the strategic move to boost AI factory capacity. The mention includes details of the share purchase price for CoreWeave stock and technology sharing aspects.
"NVIDIA is investing an additional $2 billion into CoreWeave to accelerate the build-out of AI factories, including purchasing CoreWeave's common stock at $87.20 a share."

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587. The Peak Daily

Episode: Zombie Zellers - Nvidia inaugurates the $5 trillion club, Zellers returns from the dead (again).
Date: 2025-10-30 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA reaching a $5 trillion valuation fueled by strong sales and significant AI chip orders, highlighting the company's rapid growth and market dominance in AI technology. It mentions CEO Jensen Huang's securing of half a trillion dollars in AI chip orders and the potential geopolitical relevance of NVIDIA's technology amid US-China relations.
"CEO Jensen Huang said NVIDIA has secured half a trillion dollars in AI chip orders for the next five quarters."

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588. Headline News

Episode: Israel bombs entrance to Syrian military headquarters in Damascus
Date: 2025-07-16 | Relevance: 65/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: In the podcast, NVIDIA CEO Jensen Huang discussed the rapid growth of the AI industry in China, emphasizing the high processing requirements of advanced AI models and highlighting NVIDIA's H20 hopper architecture as ideal for meeting such demands. He acknowledged strong competition but conveyed optimism about NVIDIA's position, mentioning the lifting of the U.S. export ban on the chips.
"The AI models recently has advanced very greatly. DeepSeq R1, Alibaba's QN, Moonshot. And these models are very advanced and the inference requirement, the processing requirement is very high. And NVIDIA's H20 hopper architecture is really ideal for that. And the demand is so great across all of the services. Of course, we have a lot of competition, so we have to work hard."

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589. Tech Industry Daily: Breaking News & Analysis

Episode: Tesla's Trillion-Dollar Trillionaire? Nvidia's China Chill Shakes Tech
Date: 2025-11-07 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia in the context of its stock performance amid broader market volatility and investor concern over AI growth sustainability. It highlights Nvidia's decision to halt AI chip shipments to China following U.S. export restrictions, with CEO Jensen Huang confirming no plans for further exports to China, a move expected to impact the semiconductor supply chain.
"CEO Jensen Huang confirmed that the company, central to the AI hardware race, has no plans for further China exports."

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590. Mark Leonard's World in 30 Minutes

Episode: Live from the Aspen Security Forum: America's inward turn
Date: 2025-07-21 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent U.S. policy changes on AI chip exports, highlighting a meeting between President Trump and NVIDIA CEO Jensen Huang, who subsequently visited China expressing hopes to export more advanced chips. The conversation centers on the geopolitical and strategic implications for NVIDIA rather than detailed company strategy.
"Last week, he reversed the H20 chip restriction after a meeting with Jensen Huang, the head of NVIDIA. And Huang then went to China and said he hoped to be able to bring more advanced chips than the H20 to China."

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591. The Year of the Cow - A Ryan Fair Podcast

Episode: EPISODE 1 - The 15% Payoff: Chips, China, and Cold War 2.0
Date: 2025-08-12 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses a deal involving NVIDIA and AMD paying a 15% export tax on AI chips to the U.S. government, highlighting concerns about lifting restrictions on high-end AI processors being exported to China amid geopolitical tensions.
"The deal that nobody saw coming was NVIDIA and AMD agreeing to give 15% of all of its AI chip export revenue to the U.S. government."

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592. The DigitalEkho Channel

Episode: #29 - AI12 - Mary Meeker's 340 page AI Trends Report taken apart
Date: 2025-06-08 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's significant role in the rapid growth of AI developer ecosystems, highlighting the increase from 1 million to 6 million developers in seven years, reflecting its critical position in powering AI applications. It also notes the massive capital expenditures on AI infrastructure by NVIDIA alongside other major tech companies, indicating a major industry investment in AI technology and computing power.

"The source material uses the example of a leading chip maker, NVIDIA, kind of as a proxy for this trend. Their developer ecosystem has grown from 1 million developers to a massive 6 million in just seven years."

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593. Logically Answered

Episode: Nvidia's $500 Billion Gamble (& The AI Bubble) | Logically Answered
Date: 2025-10-12 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's significant investment in building AI-focused data centers, termed 'AI factories,' which differ from traditional data centers and are specialized for generating AI tokens using Nvidia GPUs. It explains the concept of AI token generation and the role such data centers play in supporting large language models like ChatGPT.

"These data centers are not storing our files. It has one job and one job only to produce intelligent tokens, the generation of AI. Tokens are the lifeblood or language of large language models or LLMs."

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594. The Sams Report

Episode: First Party Hardware-Ish
Date: 2025-09-19 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a significant development where NVIDIA plans to invest $5 billion into Intel to co-develop x86 chips with RTX GPUs, marking a notable move into the x86 market and suggesting strategic collaboration impacting supply chain and product development.

"NVIDIA is going to be investing $5 billion into Intel to help co-develop x86 chips with RTX GPUs. This is fascinating for like a trillion dollar reasons because one, we all know what's going on with Intel NVIDIA is really deep in bed with ARM and so then here you have NVIDIA being like Hey, you know what? We're going to dabble in x86 as well."

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595. NPI Tech Guys

Episode: Robinhood's Gold Push, Google's Project Aluminum, and Big Tech Breaches
Date: 2025-10-04 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent joint venture with Intel to develop x86 RTX chips that integrate NVIDIA's graphics and AI technologies into Intel CPUs, highlighting NVIDIA's dominant position in the desktop graphics market and its $5 billion investment in Intel stock. The hosts consider the partnership a strategic move against competitors like AMD and emphasize NVIDIA's ongoing strong market trajectory.

""The partnership was detailed in a press release by NVIDIA CEO Jensen Hong, describing it as a fusion of NVIDIA's AI and accelerated computing with Intel CPU.""

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596. Data Skeptic AI

Episode: Top AI News: Devices, Chips, and GPUs
Date: 2025-10-05 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic $5 billion investment in Intel, highlighting their collaboration to co-develop AI infrastructure and chips combining Intel CPUs and NVIDIA GPUs. It frames this partnership as a significant move to maintain NVIDIA's dominance in the AI hardware market ahead of competitors like AMD.

"NVIDIA just pulled off a $5 billion power move, and they bought their biggest rival or huge stake in it. 4% of Intel instantly becoming one of Intel's largest shareholders. But it's not just about the money. This is about survival in the AI chip board."

597.

Episode: No11: ASML Mistral
Date: 2025-09-14 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the reduction in NVIDIA's revenue share from China due to Alibaba and Baidu training AI on their own chips, highlighting competition and NVIDIA's dependence in China. It also references Google's early TPU developments and the trend of large companies making their own chips for AI training.

"Alibaba and Baidu began training AI on their own chips, reducing dependence on NVIDIA."

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598. FT News Briefing

Episode: A crunchy week for chipmakers
Date: 2026-02-06 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's challenges and developments regarding the export approval of its H200 AI chips to China, the CEO Jensen Huang's lobbying efforts with the U.S. government, and the company's recent market performance amidst competition and geopolitical issues.
"In December, there was this huge breakthrough. The NVIDIA CEO, Jensen Huang, had intensively lobbied the White House to turn around its stance on export controls on these chips."

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599. Intelligenza Artificiale Spiegata Semplice

Episode: FOCUS ON | Geopolitica dell'AI: Chi ha il potere?
Date: 2025-09-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the geopolitical significance of Nvidia in the AI industry, focusing on Jensen Huang as a key figure and Nvidia's central role in AI infrastructure amid US-China tensions. It situates Nvidia within the broader context of semiconductor companies and the strategic competition between these two countries.
"E stato proprio nel contesto di quel libro che ho deciso di occuparmi maggiormente di Nvidia nel 2022 che poi e diventata l'azienda al centro della narrazione di geopolitica dell'intelligenza artificiale."

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600. Tech Brew Ride Home

Episode: Mon. 08/11 - Nvidia To Pay The Government To Sell In China
Date: 2025-08-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia paying the US government 15% of revenues from AI chip sales in China to obtain export licenses, highlighting a unique quid pro quo arrangement during the Trump administration involving Jensen Huang's meeting with the President.
"Sources are telling various places that Nvidia and AMD have agreed to pay the US government 15% of revenues from H20 and MI308 chip sales in China to obtain the export licenses granted to those companies last week."

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601. Tech News Daily

Episode: Australia Implements AI Abuse Laws, SAP Launches 20B Cloud Initiative, Tesla Reveals Master Plan, Jabra and Lenovo Unveil AI Meeting Solution, and more...
Date: 2025-09-03 | Relevance: 70/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's involvement in a major AI infrastructure project in the UAE, highlighting the use of NVIDIA's advanced Grace Blackwell GB300 systems in the Stargate data center and the company's ongoing chip supply to Saudi Arabia despite geopolitical tensions. It also touches on efforts by the UAE and other regional players to diversify their AI supply chains and build global AI data centers.
"This phase will utilize NVIDIA's advanced Grace Blackwell GB300 systems and cover 1 gigawatt of capacity."

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602. The Amazing AI News

Episode: AI Surge. Nvidia Analytics. Encouraged Suicide.
Date: 2025-08-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia CEO Jensen Huang's optimistic outlook on the ongoing AI surge despite lower sales predictions, emphasizing Nvidia's global influence and strategic positioning, particularly regarding US tech standards and earnings of Q2. Additionally, there is mention of Nvidia's positive impact on associated companies like Palantir.
"Nvidia CEO Jensen Huang has injected a new sense of optimism in the tech sector, particularly in AI and Palantir, despite a lukewarm sales forecast."

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603. Tech Brew Ride Home

Episode: Nvidia Kindacquires Groq
Date: 2025-12-29 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent licensing deal and quasi-acquisition of Groq, highlighting the integration of Groq's CEO and most employees into NVIDIA, while noting that Groq continues to operate independently. It provides insight into NVIDIA's AI strategy through this partnership and hints at strategic moves ahead of CES.
""NVIDIA has agreed to a licensing deal, in quotes, with Grok. Grok CEO Jonathan Ross and other top executives will join NVIDIA. In fact, sources say around 90% of Grok's employees will be joining NVIDIA.""

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604. Zacks Market Edge

Episode: The Case for Buying NVIDIA Right Now
Date: 2025-05-15 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the investment case for NVIDIA in 2025, highlighting steady earnings and revenue growth despite stock sell-offs, and the continuing strength of NVIDIA's AI and chip business outlook. The host revisits a previous episode analysis and comments on the stock price becoming cheaper after recent market volatility.

"If I can make the case for buying NVIDIA last year, based on what we knew then about the earnings and the revenue and the outlook for AI and for their chips, then I definitely can make the case for it here in 2025."

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605. Bloomberg Talks

Episode: BONUS: Nvidia GTC Quantum Day Special
Date: 2025-03-20 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: NVIDIA's CEO Jensen Huang discusses the convergence of quantum computing and AI supercomputing, provides a clarification on his previous comments about quantum computing timelines, and outlines NVIDIA's involvement in both fields during the GTC conference.

"In the world of technology, historically, at least, these have been two distinct fields, quantum computing and accelerated computing or supercomputers for AI. But increasingly, those worlds are coming together."

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606. Opening Bid Unfiltered

Episode: Why Nvidia is unstoppable
Date: 2025-02-24 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features an interview with Louis Navalier discussing NVIDIA's earnings and emphasizing their dominance in generative AI chips, recommending holding the stock for the long term due to their competitive edge.

"I have to stay on tech. I mean, I've seen, you've written about NVIDIA in the past. This is a week where NVIDIA could either send the market to new highs or send it right down to the toilet. Let's say you want NVIDIA. Do you still like the company? And, you know, how important is this one single earnings release from this company? Well, it's important, but their guidance is even more important. And I'm on the record saying that you should hold NVIDIA at the end of the decade because no one can compete with them in the regenerative AI chips."

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607. Bloomberg Tech

Episode: All Eyes on Nvidia Ahead of Earnings
Date: 2025-11-19 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The Bloomberg Tech podcast discusses NVIDIA ahead of its earnings report, focusing on investor expectations for significant revenue and net income growth driven by AI spending. The discussion highlights NVIDIA's strong stock performance and the company's role in a new global AI infrastructure program.

"NVIDIA is up more than 2.5 percent, but off its session high. It is a stock that's up almost 40 percent year to date, outperforming double the performance of what we've seen of the NASDAQ 100 and S&P 500."

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608. Up First AI

Episode: Nvidia Bets $20B on Groq Tech + Executive Raid
Date: 2026-01-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast analyzes Nvidia's $20 billion non-exclusive licensing deal with TPU company Groq, highlighting the strategic implications and market reactions without direct insider commentary from Jensen Huang.

"Nvidia has just signed a $20 billion deal to license technology from Groq, a TPU company."

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609. Chip Stock Investor Podcast

Episode: Nvidia And Intel Deal: What Investors Need To Know
Date: 2025-09-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses a recent deal where Nvidia invested $5 billion into Intel stock, touching on the implications for Nvidia's financials and positioning in the chip industry. It offers a cautious analysis of the news following public excitement and media hot takes.

"The most obvious one is that if you own Nvidia stock... you also own some Intel by extension because Intel stock is now going on to Nvidia's balance sheet."

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610. World Business Report

Episode: Nvidia investing $100 billion in OpenAI
Date: 2025-09-23 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's announcement of a $100 billion investment into OpenAI to build next-generation AI infrastructure, highlighting Nvidia's pivotal role in AI hardware and its strategic collaborations to lead the AI race.
"The world's most valuable company, the US tech firm and chipmaker Nvidia, has announced it's investing up to $100 billion in another tech giant, OpenAI, the creator of ChatGPT, to build database infrastructure for what it calls the next generation of artificial intelligence."

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611. ChatGPT: News on Open AI, MidJourney, NVIDIA, Anthropic, Open Source LLMs, Machine Learning

Episode: Back in Business: Nvidia and China
Date: 2025-07-21 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent ability to resume shipping H20 AI chips to China after regulatory challenges, highlighting the significant revenue impact and the unique story behind this development.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo... we're going to get into the background of where it's been in the past, why they're able to start shipping this again, what changed and also how many billions of dollars this is going to add to Nvidia's overall revenue."

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612. The John Batchelor Show

Episode: Nvidia: Huawei fails to match. #ScalaReport: Chris Riegel CEO, Scala.com @Stratacache
Date: 2025-08-15 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's rise from a gaming chip maker to a strategic leader in AI hardware and software, highlighting Jensen Huang's leadership and the company's integral role in global supply chains and national security considerations. There's emphasis on NVIDIA's success and its importance beyond just a chip maker, including competition with China and collaboration with major manufacturing partners.
"NVIDIA has become the gem of gems in the Wall Street and in global investors' portfolios. Everybody has NVIDIA in their portfolio."

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613. Becker Private Equity & Business

Episode: NVIDIA Keeps Rocking & Rolling 1-10-26
Date: 2026-01-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses NVIDIA's current market position, recent investments, and CEO Jensen Huang's stance on remaining in California despite potential tax changes. It also highlights Jim Cramer's bullish view on NVIDIA's stock value.
"Jim Cramer... essentially says that NVIDIA at its current price is cheap. He says the two stocks that he would double down on right now are NVIDIA and Intel."

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614. Tech Update | BNR

Episode: Nvidia-baas Jensen Huang trapt grootste computerbeurs ter wereld af
Date: 2025-05-19 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's recent activities around promoting Nvidia's AI capabilities at Computex, highlighting the company's efforts to convince the world of AI's importance and their new technology to link AI chips for improved development globally.
"Nvidia-baas Jensen Huang is alweer druk bezig met de wereld te overtuigen van AI."

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615. AI Education

Episode: Nvidia Gets Green Light for China Sales
Date: 2025-07-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent ability to resume shipping AI chips, specifically the H20 AI chips, to China after navigating US regulatory restrictions, highlighting the significant revenue impact for Nvidia. The episode explores the background of the restrictions and the implications of the new sales permissions.
"Nvidia made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China, which is going to add billions of dollars to Nvidia's overall revenue."

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616. Aus dem Cafesatz, aktuelle Kapitalmarkt Themen verstandlich erklart mit Zsolt Janos

Episode: NVIDIA hat das Erwartete gezaubert
Date: 2025-02-27 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent earnings presentation by CEO Jensen Huang (referred to as Jason Horn), highlighting the significant investor interest and the impact of AI advancements like ChatGPT on system performance demands, emphasizing the need for much faster chips.

"Jason Hohan hat daruber gesprochen, dass seit der Einfuhrung von JetGPT die Systeme deutlich schneller werden mussten. ... in etwa 100-fach schneller mussen die Chips mittlerweile sein."

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617. Becker Business Minute Podcast

Episode: NVIDIA Keeps Rocking & Rolling 1-10-26
Date: 2026-01-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's current market position, recent investment in Intel, resuming sales to China, and CEO Jensen Huang's decision to remain in California despite potential wealth tax. It also highlights Jim Kramer's positive outlook on NVIDIA's stock value.
"Jim Kramer essentially says that NVIDIA at its current price is cheap and that he would double down on NVIDIA."

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618. Jensen Huang - Biography Flash

Episode: Biography Flash: Jensen Huang Ignites CES 2026 with AI Revolution Keynote at Fontainebleau Las Vegas
Date: 2026-01-03 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's upcoming keynote at CES 2026 where he is expected to highlight NVIDIA's advancements in AI, robotics, and data center solutions, reinforcing the company's dominance in the AI chip market. The segment previews Huang's role in shaping industry narratives and mentions anticipation from analysts and traders ahead of the event.
"NVIDIA Live at CES 2026 hits the Fontainebleau Las Vegas stage on January 5th at 1pm, promising 90 minutes of breakthroughs in AI, robotics, simulation, and industry-shaking solutions."

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619. Elon Musk Podcast

Episode: Elon Musk and Jensen Huang Make Future Predictions At U.S.-Saudi Arabia Forum
Date: 2025-11-24 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang and Elon Musk discuss the impact of AI on productivity and future work paradigms, highlighting NVIDIA's role in advancing AI technologies that will transform industries and productivity. Jensen emphasizes how AI simplifies complex and arduous tasks, enabling more innovation and busier schedules.
"One of the things that I will say is that for most people or company, if your life becomes more productive, and if the things that you're doing with great difficulty become simpler, it is very likely, because you have so many ideas, you'll have more time to go pursue things."

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620. Elon Musk Thinking

Episode: Elon Musk And Jensen Huang Talk AI And Furture Of Technology at U.S. - Saudi Investment Forum!!!
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang discusses how AI will transform work and productivity, expressing an optimistic outlook on AI's impact on NVIDIA's growth and innovation pipeline. He highlights that AI will simplify complex tasks, enable greater productivity, and generate many new opportunities and ideas within NVIDIA.
"For most people or company, if your life becomes more productive, and if the things that you're doing with great difficulty become simpler, it is very likely because you have so many ideas, you'll have more time to go pursue things."

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621. The Atlantic Out Loud

Episode: The New King of Tech
Date: 2025-04-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses NVIDIA's evolution from a graphics card company to a dominant player supplying chips for AI large language models, highlighting its lucrative position amidst fierce AI competition. It references the AI landscape and NVIDIA's role in the AI hardware sector but doesn't contain direct quotes from Jensen Huang on strategy or supply chain.
"NVIDIA, the company that designs the computer chips or graphics processing units, GPUs, that many of these large language models have been trained on, it's also enormously lucrative."

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622. China Insider

Episode: China Insider | Jensen Huang in Beijing, PLA Navy's CNS Fujian, Taiwan VP Hsiao Bi-khim at IPAC
Date: 2025-11-11 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast episode discusses NVIDIA CEO Jensen Huang's recent visit to Beijing amid a U.S. government investigation into export controls related to sales to China, highlighting NVIDIA's $500 billion investment in AI infrastructure in the U.S. and concerns about licensing restrictions affecting China sales.
""NVIDIA CEO Jensen Huang visited Beijing last Thursday, a day after the U.S. government announced an investigation into the company and whether it violated export control and other trade rules with sales to China.""

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623. Hudson Institute Events Podcast

Episode: China Insider | Jensen Huang in Beijing, PLA Navy's CNS Fujian, Taiwan VP Hsiao Bi-khim at IPAC
Date: 2025-11-11 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's recent visit to Beijing amid a U.S. investigation into possible export control violations related to sales to China. It also covers NVIDIA's announcement of a $500 billion investment in AI infrastructure in the U.S. and the geopolitical tensions influencing the company's activities between the U.S. and China.

"NVIDIA CEO Jensen Huang visited Beijing a day after the U.S. government announced an investigation into the company and whether it violated export control and other trade rules with sales to China."

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624. The Future Of Work With Jacob Morgan

Episode: Job Predictions Collide, RTO Tightens, Workweeks Shift, and Consulting Gets Rebuilt
Date: 2025-12-04 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's optimistic views on AI's impact on jobs and industries, highlighting his perspective that AI will augment rather than eliminate jobs, and predicting new roles and industries driven by AI and robotics. Huang also shares insights into NVIDIA's AI strategy and the evolving role of consultants in AI workflows.

"While AI will automate many tasks, it won't eliminate most jobs. Radiology has grown as radiologists use AI to assist them rather than replace their roles."

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625. jawbreaker.io

Episode: The Great AI Debate: Job Loss or New Opportunities?
Date: 2025-06-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang of NVIDIA refutes a prediction that AI will cause significant job losses, arguing instead that AI will create new opportunities and enhance businesses when developed responsibly. This highlights NVIDIA's optimistic stance on AI's impact compared to a more cautious competitor.

"I pretty much disagree with almost everything."

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626. CTSS Academy

Episode: From a Diner Napkin to $3 Trillion - The Nvidia Story
Date: 2026-01-05 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode provides a historical overview of NVIDIA's origin and growth, highlighting the audacity of CEO Jensen Huang and the company's strategic pivots. It frames NVIDIA as a core infrastructure company for the 21st century, emphasizing its journey from a small startup to a $3 trillion market cap leader.

"The source material you have focuses so well on the near-death experiences, these huge pivots, and just the sheer audacity of the CEO, Jensen Huang."

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627. Revise and Resubmit - The Mayukh Show

Episode: The Nvidia Way (Kim 2024) - Weekend Book Review
Date: 2025-03-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's unique organizational culture known as 'The NVIDIA Way', emphasizing Jensen Huang's long-term leadership and the company's balance of autonomy and high standards driving its success amid fierce competition and technological disruption.

"And that's why when you look at a story like NVIDIA and Jensen Huang, who's been at the helm for three decades. Right. That's almost unheard of."

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628. Worldwide Exchange

Episode: China chips, Nvidia's moment, key data ahead 11/20/25
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's strong market performance following its earnings report, highlighting CEO Jensen Huang's dismissal of an AI bubble and the positive impact on the tech sector and global markets. It also notes the rise in NVIDIA shares and beating expectations for data center revenue, though no definitive agreements with OpenAI are confirmed.

"From our vantage point, we see something very different. U.S. chips are rising along with global tech names, all of them riding NVIDIA's wave."

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629. The Future of Everything News

Episode: Nvidia's Sales Recovery in China
Date: 2025-07-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's ability to resume shipments of its H20 AI chips to China after navigating US regulatory restrictions and the significant revenue impact expected from this development. The host also highlights NVIDIA's AI model Numatron 70B among other AI offerings.
"NVIDIA made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China."

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630. The Elon Musk Update

Episode: Nvidia's China Comeback
Date: 2025-07-21 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's resumption of shipping AI chips to China after regulatory hurdles, emphasizing the potential impact on Nvidia's revenue and the regulatory background.
"Nvidia is set to start shipping chips back to China again after months of this thing being in limbo."

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631. reforma.com - Benchmark con Jorge A. Melendez

Episode: La formula de Nvidia
Date: 2025-04-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses NVIDIA's history, Jensen Huang's leadership style, and the company's impact on AI chip development, highlighting both the challenges and successes of NVIDIA's journey.
"Chicos, les dijo, es hora de dejar de pulir el mojon, o sea la caca. Esta claro que lo estamos haciendo de la manera incorrecta y nadie va a apoyar nuestra arquitectura."

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632. Artificial Intelligence: AI News, ChatGPT, OpenAI, LLM, Anthropic, Claude, Google AI

Episode: Nvidia's AI Boom Stuns Economists
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings amidst AI market skepticism, highlighting the company's impactful investments in AI startups and its ongoing market rally. The host notes NVIDIA's bullish stance through CEO Jensen Huang and evaluates whether the AI bubble concerns are justified.
"The founder and CEO, Jensen Huang, he seems very bullish."

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633. The Dig AI

Episode: Nvidia Hits $57B Revenue as Investors Debate Overvaluation
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record quarterly earnings and investor reactions, emphasizing the company's ongoing impact on the AI market and investments in AI startups. The host notes Jensen Huang's bullish stance amid AI bubble concerns and Nvidia's role in sustaining market excitement.
""Nvidia just came out with their quarterly earnings and it shocked a lot of people. They set a record and a lot of people are saying that this is quieting the AI bubble talk.""

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634. Monde Numerique (Actu Tech)

Episode: Davos 2026 : l'IA au cur du pouvoir mondial (Zoom Tech)
Date: 2026-01-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's perspective on AI as a fundamental infrastructure comparable to electricity or telecom, emphasizing massive investments needed globally for AI data centers and infrastructure. It highlights the importance Huang places on national commitment to AI development, framing Nvidia's role within this AI industrial and geopolitical context.
"'L'IA est une infrastructure et il n'y a pas'"

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635. (Audio)NEWS/VIEWS/NOVELS

Episode: Business Matters
Date: 2025-05-30 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses U.S.-China trade tensions impacting Nvidia, including concerns from U.S. senators about Nvidia's plans for a research office in China and CEO Jensen Huang's criticism of U.S. export controls affecting the company's market share in China.
"CEO Jensen Huang has long criticized the U.S. export controls of semiconductors, saying it threatens America's AI leadership and has caused Nvidia to lose significant market share."

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636. Cyber Wire AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic partnership and growth in AI infrastructure. The host provides context on CoreWeave's situation and the significance of the deal without direct commentary from NVIDIA executives.

"$2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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637. Latent Space AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave, a data center operator, to expand AI compute capacity by 5 gigawatts. It emphasizes the scale of the deal and hints at NVIDIA's strategic move to enhance AI infrastructure through this partnership.

"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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638. Daily Tech News

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI computing capacity, highlighting the scale and strategic importance of this deal in AI infrastructure growth.

"$2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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639. This Week in News

Episode: Nvidia's Bold Stance on Global Tech Restrictions
Date: 2025-09-05 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the arrest of individuals smuggling NVIDIA AI chips to China, debates about embedding kill switches or backdoors in NVIDIA chips, and the implications for the AI

"Two people were just arrested for smuggling AI chips to China, and the rumors basically point to the fact that these were NVIDIA chips."

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640. Market Research Webinars

Episode: NVIDIA's Failed ARM Bid_ Strategy and Semiconductor Shift.
Date: 2025-04-01 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses NVIDIA's failed bid to acquire ARM Holdings, explaining ARM's critical role in chip design and NVIDIA's core business in GPUs, especially their growing importance in AI and high-performance computing. It explores the strategic reasons behind NVIDIA's interest in ARM and its implications for the semiconductor industry.

"So NVIDIA. Yeah. For a lot of people, it's graphics cards, right? It is graphics processing units. GPUs. The things gamers love. But also increasingly, you know, they're very important in artificial intelligence."

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641. AI Education

Episode: Exploring Nvidia's Stand on Export Controls: Navigating the politics of technology
Date: 2025-08-29 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses a recent incident involving the smuggling of high-performance AI chips, believed to be NVIDIA's, to China amid ongoing export control and geopolitical tensions. It touches on NVIDIA's response and the broader context of the US-China AI technology race but does not include direct commentary from NVIDIA executives.

"People are asking NVIDIA to put kill switches and backdoors in their chips. NVIDIA has responded, the White House is weighing in."

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642. The Last Invention is AI

Episode: Nvidia's Growth Shakes Confidence in Competitors
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent record-setting quarterly earnings and the CEO Jensen Huang's bullish outlook. It highlights NVIDIA's pivotal role in the AI sector, especially through its investments in major AI companies, contributing to ongoing market confidence despite talk of an AI bubble.

"NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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643. Bloomberg Intelligence

Episode: Trump Nvidia Deal Reshapes US's China Strategy
Date: 2025-12-09 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the recent U.S. policy allowing NVIDIA to sell H200 chips to China, noting the technical specifications of these chips and highlighting China's potential response to limit their use. It also touches on the complexities of trade policy negotiation related to NVIDIA's products in the current political climate.

"I'm hearing time and time again from some of the most powerful people in the technology space that we are underestimating how sophisticated China is using the NVIDIA chips, the small amount they already have, and some of those homegrown ones."

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644. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: Ep 491 Agentic and Physical AI in Medtech How NVIDIA is Changing the Space EDAI.
Date: 2025-03-27 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features an interview with Prerna Dobra, NVIDIA's director of product management for healthcare AI, discussing how NVIDIA is advancing AI in the medtech space, focusing on agentic and physical AI applications. The conversation highlights NVIDIA's role at GTC and their impact on healthcare AI innovation.

""At NVIDIA, I head our product management and..." (indicating direct insight from a company insider in healthcare AI)."

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645. Artificial Intelligence: AI News, ChatGPT, OpenAI, LLM, Anthropic, Claude, Google AI

Episode: AWS Chip Rival to Nvidia Generates Multibillion Revenue
Date: 2025-12-07 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's dominant position in the AI chip market and highlights the emerging competition from AWS's AI chips, emphasizing that while Nvidia currently holds a strong monopoly, AWS's multi-billion dollar business and cloud infrastructure pose a growing challenge.

"A lot of attention is given to Nvidia's chip dominance in the current AI landscape. They are making insane amounts of money and it seems like they are one of these unstoppable forces for training AI models, but it feels like cracks are appearing in their monopoly on the chip market."

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646. ChatGPT: OpenAI, Sam Altman, AI, Joe Rogan, Artificial Intelligence, Practical AI

Episode: AWS Chip Revenue Breakthrough Marks New Era in Cloud AI
Date: 2025-12-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's dominance in the AI chip market and highlights emerging competition from AWS's multi-billion dollar chip business. It outlines how AWS leverages NVIDIA chips within its cloud infrastructure, indicating cracks in NVIDIA's monopoly but acknowledging its entrenched market position.

"A lot of attention is given to NVIDIA's chip dominance in the current AI landscape. They're making insane amounts of money and it seems like they're one of these unstoppable forces for training AI models and, you know, becoming the most valuable company in the world just further pushed that narrative. But it feels like cracks are appearing in their monopoly on the chip market."

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647. The AI XR Podcast

Episode: Special From CES 2026: AI Strategy, Tariffs, and the Future of Consumer Tech - Gary Shapiro, CEO
Date: 2026-01-03 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent $20 billion acquisition/licensing deal with Grok, highlighting skepticism about the nature of the deal as a 'fake M&A' or acqui-hire to circumvent regulations. There is also mention of NVIDIA's strategic moves related to competition and supply chain with references to Intel and implications for AI inference technology.

"You would think over the Christmas holiday there wouldn't be any. There's a chip designer out of Singapore called Grok... So NVIDIA presumably or supposedly has a weak spot here. So they sort of not bought Grok for $20 billion... this fake M&A... It's kind of ridiculous. Like we're not buying you, but we are buying you."

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648. The Zero100 Podcast

Episode: "Bigger Than ChatGPT": What Agentic AI Means for Supply Chain
Date: 2025-05-19 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's role in deploying AI agents in the quick-service restaurant industry, particularly highlighting a partnership with Yum Brands to improve drive-thru and call center operations, resulting in measurable efficiency gains.

"They partnered with NVIDIA to deploy AI agents across their drive-thrus and call centers. And these agents are trained to take orders with natural voice interaction... that's led to a 29-second reduction in average drive-thru time and round-the-clock service for customers."

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649. Chip Stock Investor Podcast

Episode: Nvidia Picks the Next Big Winner In Enterprise Software and Quantum Computing?
Date: 2025-12-02 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic investment in Synopsys, a key upstream player in the semiconductor supply chain, highlighting potential growth and integration benefits within the semiconductor industry and enterprise/cloud markets. The discussion focuses on how this investment relates to NVIDIA's broader business strategy rather than direct commentary from Jensen Huang.

"If you've been worried about Nvidia having a circular relationship with some of the companies that they sell their equipment to, we're just going to add fuel to the flames here with a new announcement from yesterday, Nvidia investing in Synopsys, which would be an upstream company for Nvidia."

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650. Marketplace All-in-One

Episode: Bytes: Week in Review - Saudi Arabia bets billions on AI
Date: 2025-05-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses U.S. government export controls affecting NVIDIA's advanced AI semiconductor chips and how these policies influence NVIDIA's supply chain dynamics and competition with China. It also highlights China's efforts to develop homegrown AI chip technology in response to these restrictions.

"The big question is really where China and the U.S. stand when it comes to getting access to those very coveted NVIDIA chips."

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651. theCUBE Podcast

Episode: 96. NVIDIA GTC - The Super Bowl for AI and Ethereum Under Pressure
Date: 2025-03-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses NVIDIA's GTC event, highlighting Jensen Huang's framing of GTC as the 'Super Bowl of AI' and emphasizing NVIDIA's central role in the computer science revolution and AI technology advancements. There is also mention of technical topics such as homogeneous stacks and a new Ethernet initiative called Super Ethernet and Spectrum X, reflecting ongoing developments and announcements at the event.

"He said on stage. Because think about it, because the Woodstock was like this cultural event, right? And that's what GTC was last year and then the Super Bowl, like after the first one it was like, okay, another one, another one, and another one. And then they're great every year, they're big spectacles and that's what GTC is now."

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652. The Silicon Insider

Episode: Ai Competition Heats Up & $500 Billion Apple Investment in USA
Date: 2025-02-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's perspective on AI competition, highlighting his belief that having more competitors with open source products benefits the AI industry and NVIDIA by increasing chip usage. The discussion reflects that NVIDIA thrives amid AI competitors pushing innovation and spending more, rather than focusing on any single competitor like OpenAI.

""NVIDIA doesn't live or die by the deep seeks or the open AI winning. NVIDIA lives or dies by AI competitors competing with each other.""

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653. The AI Podcast

Episode: NVIDIA Restricts China's Access to H200 Chips
Date: 2026-01-10 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent policy changes tightening sales terms for its H200 AI chips in China, including requiring full upfront payment and restricting refunds or order changes. It also mentions NVIDIA's expanding use of AI across industries like construction and nuclear fusion.

""Right now, they are tightening their grip on how their most advanced chips are sold in China... requiring Chinese customers to pay the full cost up front for their H200 AI chips.""

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654. Schwab Network

Episode: Patience: PLTR Not a "Game Changer," Faces Steep A.I. Competition
Date: 2025-08-21 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in the AI hardware and software ecosystem, highlighting its role as the primary supplier of AI chips and an important provider of the software stack, amidst stiff competition from tech giants like Google and Microsoft. The speaker notes that NVIDIA is currently the ultimate winner in the AI chip supply chain, working closely with hardware suppliers such as TSMC and ASML.

"Obviously, NVIDIA is the at the moment the ultimate winner of all of this, because not only does it supply the chips, but increasingly supplies the software stack."

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655. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: Nvidia to pay $20B to License Groq Tech, Hire CEO and President
Date: 2025-12-25 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $20 billion non-exclusive licensing deal with Groq, focusing on its implications and valuations. There is analysis about NVIDIA's GPU competitiveness compared to TPUs, and the deal's strategic significance, but no direct commentary from Jensen Huang.

"Basically, people are saying this is Nvidia admitting that there's no way their GPUs could keep up with TPUs."

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656. RiskReversal Pod

Episode: Gene Munster: Nvidia Earnings Key Takeaways
Date: 2025-02-27 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The discussion centers on Nvidia's recent earnings results where the revenue guide was slightly below expectations and the margin guidance was also lower than street estimates. There is mention of Jensen Huang's positive long-term outlook, but immediate guidance is considered mixed to disappointing given high market expectations.

"I was largely mixed to disappointed in what the guidance was."

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657. CISO Insights: Voices in Cybersecurity

Episode: Germany AI Trends 2025: Navigating the Global Race
Date: 2025-03-26 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's leadership in AI, highlighting CEO Jensen Huang's impactful announcement of the AIPC at CES, which suggests a decentralized future for AI processing power. It also touches on NVIDIA's stock market performance and the competitive landscape influenced by international advancements.

"And arguably leading the charge is NVIDIA. Oh, yeah. NVIDIA. They've been on a roll. They have. And their CEO, Jensen Huang, well, he really stole the show at CES this year with the AIPC announcement."

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658. Squawk Pod

Episode: China's Chip Supply & POTUS vs. Powell 4/17/25
Date: 2025-04-17 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang being in Beijing amidst U.S. government scrutiny of NVIDIA's chip supply to Asian AI competitors, highlighting the intersection of competition and national security concerns.

"NVIDIA. CEO Jensen Huang is in Beijing just as the US government is eyeing the company's supply of chips to AI competitors in Asia. We take a look at just how thin the line is between competition and national security."

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659. Now You Know Podcasts

Episode: Tesla Robotaxi Competition? | Tesla Time News 568
Date: 2026-01-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's announcement of Alpamayo, a new AI system for autonomous vehicles, comparing it to Tesla's approach and perceiving the competition positively. The conversation highlights NVIDIA's role in advancing autonomous driving technology and its potential impact on the industry.

"So Jensen Wang, the CEO and founder of NVIDIA announced yesterday that they have new hardware and software to tackle autonomous driving. Today we're announcing Alpamayo, the world's first thinking, reasoning, autonomous vehicle AI."

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660. Schwab Network

Episode: Semiconductor Trend is Strong, NVDA Valuation Not 'Stretched'
Date: 2025-02-26 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The discussion focuses on NVIDIA's role as a key tech and AI player, its strong quarterly performance supported by reports from major customers like Amazon and Alphabet, and valuation considerations reflecting a maturing growth cycle. The analyst highlights NVIDIA's importance in tech portfolios despite challenges in maintaining previous high magnitude earnings beats.

"For any investor who has any sort of index exposure, any sort of tech exposure, it's very important. NVIDIA is an interesting company... it's just going to be very hard for investors to get the magnitude of beats that they have gotten in the past 18 months."

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661. Schwab Network

Episode: SMCI Success Tied to NVDA, INTC 18A Tests & "Biggest Competitor" for OKTA
Date: 2025-03-03 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's involvement in testing Intel's 18A manufacturing process as part of its chip production strategy and highlights NVIDIA's strong position in AI infrastructure as reflected in its latest earnings. It also touches on the competitive foundry

landscape and NVIDIA's potential influence on related companies like Supermicro.

"It was interesting to see Intel up big early this morning... customers like NVIDIA and Broadcom are testing Intel's 18A Foundry process... these companies are making billions and billions in bets on process technologies."

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662. AI Investing: for the AI Investor

Episode: Nvidia Announces $57B Revenue, Raising AI Bubble Debates
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record-setting quarterly earnings amidst AI bubble fears and highlights Nvidia's continued influence in the AI sector through investments in major AI companies, reflecting bullish sentiment about the company's ongoing market strength.

"The founder and CEO, Jensen Wang, he seems very bullish."

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663. Serial AI

Episode: Markets Roar After Nvidia's Mega Earnings
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings and its significant investments in AI companies, emphasizing the company's continuing positive impact on the AI market and investor confidence despite skepticism about an AI bubble.

"NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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664. AI Insights: AI News, Eyewitness Accounts

Episode: Nvidia's $57B Revenue Drives Debate on AI Sustainability
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record quarterly earnings, its ongoing influence in the AI market, and the company's investments in AI startups, highlighting Jensen Huang's bullish stance on NVIDIA's future amidst AI bubble concerns.

"NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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665. Perplexity AI

Episode: Nvidia's AI Dominance Shakes Markets
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings, highlighting Jensen Huang's bullish outlook amidst AI bubble concerns and NVIDIA's significant investments in AI companies. The discussion underlines NVIDIA's dominant market position and its influence in the AI space, though with some caution about the sustainability of the AI market hype.

"NVIDIA continues to just shock people. And keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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666. Reply AI

Episode: Nvidia's Performance Sets New Tech Standard
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent strong quarterly earnings that have surprised many and suggests the company's continued strong influence on the AI market through investments in various AI startups, indicating sustained bullish sentiment on their performance.

"NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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667. The Run-Up AI

Episode: Nvidia Posts $57B Revenue as AI Market Heats Up
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's impressive quarterly earnings that challenge the notion of an AI bubble burst, highlighting Nvidia's investments in AI companies and Jensen Huang's bullish stance on Nvidia's continued market momentum.

"Nvidia continues to just shock people and keeps the market rally going forever. Partly because they keep giving money to AI companies who turn around and give it back to them."

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668. AI Breakdown

Episode: Nvidia Achieves Record $57B Revenue, Raising Stability Questions
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record quarterly earnings and their significant role in the AI industry, highlighting investments into AI companies and the sustained market rally driven by Nvidia. The founder and CEO, Jensen Huang, is characterized as bullish despite concerns about an AI bubble.
"The founder and CEO, Jensen Wang, he seems very bullish."

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669. Me, Myself, AI

Episode: Nvidia Revenue Explosion Reshapes AI Race
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record quarterly earnings and investor optimism about its role in the AI market, highlighting the company's ongoing investments in AI startups and its positive effect on the market rally. The host expresses skepticism about the AI bubble bursting soon and notes Jensen Huang is bullish on Nvidia's prospects.
"Nvidia continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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670. AI HR

Episode: Nvidia's $57B Revenue Sparks Debate Over AI Market Stability
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings amidst AI bubble concerns and highlights CEO Jensen Huang's bullish stance. It also covers NVIDIA's investments in numerous AI companies contributing to the ongoing market rally.
"And NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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671. The Journal AI

Episode: Nvidia Records $57B Revenue Milestone in AI Chip Surge
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record-breaking quarterly earnings driven by AI chip demand, noting its strong market performance and investments into major AI companies. The host reflects on the skepticism around the AI bubble while highlighting Nvidia's continuing positive momentum and bullish stance by CEO Jensen Huang.
"The founder and CEO, Jensen Wang, he seems very bullish. People are talking in these... oh my gosh, the AI bubble is about to pop and the stock market is going to crash."

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672. Tech Brew Ride Home

Episode: The AI Concern Committee Is Back
Date: 2025-10-08 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses concerns around the AI industry bubble with a focus on NVIDIA's significant investments and interconnected deals, including its investment in OpenAI and a potential new deal involving a $20 billion raise tied to NVIDIA GPUs. Analysts express worries about circular relationships and the sustainability of AI spending despite tangible products and customers.
"Brian Colello, an analyst with Morningstar, said about NVIDIA's investment in OpenAI, "If things go bad, circular relationships might be at play.""

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673. Building AI: News on OpenAI's ChatGPT, Anthropic's Claude, Google Gemini and xAI's Grok

Episode: Nvidia Achieves $57B Revenue as AI Spending Reaches Fever Pitch
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record quarterly earnings amid AI market speculation and highlights Nvidia's significant investments in AI companies, portraying a bullish outlook on its market position. It questions whether the AI bubble concerns are warranted and underscores Nvidia's role in fueling AI industry growth.
"The founder and CEO, Jensen Wang, he seems very bullish. People are talking in these, you know, like, oh my gosh, the AI bubble is about to pop and the stock market is going to crash."

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674. China In Focus

Episode: Key U.S. Asia Defense Partners Favor Budget Rise - China in Focus
Date: 2025-08-23 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast segment discusses NVIDIA CEO Jensen Huang's visit to Taiwan and TSMC, touching on NVIDIA's chip production strategy contingent on Chinese demand and the potential introduction of a new AI chip pending U.S. government approval.
"Offering a new product to China for the data center, AI data centers, the follow-on to H20, that's not our decision to make. It's up to, of course, the United States government."

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675. Global Business

Episode: Chinese President Xi Jinping meets Australian PM Anthony Albanese
Date: 2025-07-16 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang discusses the return of the H20 chip to China, competition from Chinese chip makers, the demand for GPU technology in AI applications, and uncertainties around export controls.
"The Chinese chips are advancing very quickly. And so we will have to do our best."

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676. Breakfast with Ryan Huang, Emaad Akhtar and Audrey Siek

Episode: US Markets Wrap: AI Boom, Human Cost? Markets Rally to Record Highs
Date: 2025-10-29 | Relevance: 75/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's role as a leader in the AI boom, highlighting CEO Jensen Huang's influence on AI advancements and recent positive market reactions to Nvidia's announcements and collaborations across various industries.
"Jensen Huang himself is also, you know, one of the key masterminds behind what we've seen from AI, not just in recent years, but over the last decade, he's really driven AI to sort of where it is today."

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677. Intelligence Squared

Episode: Is Nvidia the most important company in the world? With Stephen Witt
Date: 2025-06-11 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode features author Stephen Witt discussing his book 'The Thinking Machine,' which includes insights into Nvidia's pivotal role in AI hardware, highlighting Nvidia's transformation from a disappointing stock to a key supplier for AI technology like ChatGPT. The conversation sheds light on Nvidia's impact on the AI industry through its hardware contributions.
"I quickly learned is almost all of the hardware For ChatGPT was made by a single company Called NVIDIA."

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678. Here & Now Anytime

Episode: Why Trump is letting Nvidia sell powerful AI chips to China
Date: 2025-12-09 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the U.S. government's decision under President Trump to allow NVIDIA to sell advanced AI chips to China, highlighting CEO Jensen Huang's lobbying efforts and the implications for the AI race and U.S.-China tech policy. It covers NVIDIA's H200 chip line and the strategic trade-offs involved.
"Mr. Huang told the president limiting access only encouraged China to make its own chips."

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679. SleepWise: Learn Softly, Sleep Deeply

Episode: NVIDIA: From 1993 to the AI Age | A SleepWise Story
Date: 2025-12-28 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode provides a narrative on NVIDIA's origins, highlighting the foundational idea behind its creation and the early challenges faced by its founders, including Jensen Huang. It emphasizes NVIDIA's innovative approach in developing a dedicated graphics chip to alleviate CPU workload, setting the stage for its impact on 3D graphics and gaming.
"In 1993, Jensen Huang, Chris Malachowski, and Curtis Prem started a new company with that question tucked inside it and they gave it a name that sounded like a bright place beyond the horizon. NVIDIA."

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680. The AI News Daily Brief

Episode: AI's Spatial Computing, Humanoid Robots, and Nvidia's Market Moves
Date: 2025-04-22 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's CEO Jensen Huang's emphasis on the shift from generative AI to 'physical AI,' highlighting Nvidia's role in advancing AI agents embedded in hardware like smart glasses and humanoid robots, marking a significant evolution in AI integration with the physical world.
"NVIDIA's CEO, Jensen Huang, recently emphasized the shift from generative AI to agentic AI, marking a turning point toward what he calls physical AI."

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681. The RAIZOR Report: Daily AI News in 5 Minutes

Episode: AI Gadgets at CES, Emotional AI Companions, Smarter Appliances, Nvidia's Growth, Musk vs OpenAI Trial
Date: 2026-01-12 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's rapid growth in AI computing technologies, highlighting the increasing reliance on NVIDIA chips for AI development and the CEO Jensen Huang's emphasis on innovation in hardware and software for sustainable AI growth. It also notes NVIDIA's dominant market share in AI chip production.

"In a recent interview, NVIDIA's Chief Executive Officer Jensen Huang discussed the rapid growth in AI computing technologies and their implications for multiple industries."

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682. Briefly Informed

Episode: Episode: Tue, 06 Jan 2026 06:04:15 PST
Date: 2026-01-06 | Relevance: 75/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA's CEO Jensen Huang announces new AI chips and the Vera Rubin computing platform at CES 2026, highlighting the company's advancements in AI and autonomous vehicle technologies, including partnerships and open-source AI tools for vehicle development.

"NVIDIA CEO Jensen Huang announces a new AI chip."

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683. AI Unraveled: Latest AI News & Trends, ChatGPT, Gemini, DeepSeek, Gen AI, LLMs, Agents, Ethics, Bias

Episode: AI Business and Development Daily News Rundown: Nvidia's "Rubin" Shock, The Venezuela Deepfake Crisis, & Amazon's Alexa+ Web Expansion
Date: 2026-01-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang unveiling the next generation Rubin chips ahead of schedule at CES, highlighting the accelerating AI hardware competition and NVIDIA's pivotal role in meeting growing compute demands.

"Jensen Huang just broke his own rules at CES, unveiling NVIDIA's next generation Rubin chips months ahead of schedule to feed an industry that simply cannot get enough compute."

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684. CNBC's "Fast Money"

Episode: Tech, Software Sell Off... And The Impact On Private Credit 2/3/26
Date: 2026-02-03 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: This podcast mention covers NVIDIA in the context of a market sell-off affecting tech and AI stocks. It includes comments from NVIDIA CEO Jensen Huang defending the company's investment in OpenAI and addressing concerns about the AI trade, though the stock price fell despite his remarks.

"No, there's no controversy at all. It's complete nonsense. We love working with OpenAI. We are incredibly honored and delighted to be able to invest in their next round."

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685. Bloomberg Tech

Episode: Nvidia, AMD Set to Resume Some AI Chip Sales to China
Date: 2025-07-15 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of some AI chip sales to China following U.S. government approvals, highlighting Jensen Huang's recent involvement in meetings with U.S. officials regarding export controls impacting the company.

"Jensen Huang has been clear in his message that U.S. export controls that have hit his company particularly hard have been..."

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686. Plotzlich Geld! ...?

Episode: DeepSeek und NVIDIA
Date: 2025-02-09 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses a significant one-day drop in NVIDIA's stock price, emphasizing the massive market capitalization loss and comparing it to major German companies, while questioning the implications for AI and technology sectors. It provides background on a competitor, DeepSeek, and sets context for understanding NVIDIA's market challenges but does not include direct statements from Jensen Huang.

"An einem einzigen Tag ist NVIDIA um uber 17% abgesturzt, was einem Verlust von fast 600 Milliarden US-Dollar entspricht."

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687. Here & Now Anytime

Episode: How Nvidia became a $4 trillion company
Date: 2025-08-01 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's market valuation and its critical role in the AI industry, highlighting its significant revenue growth driven by AI demand and its position alongside other tech giants in the $4 trillion market cap club. It touches on NVIDIA's

importance in the AI investment curve and the broader impact of AI on the stock market.

"Nvidia, the computer chip designer, recently became the first publicly traded company to be worth more than $4 trillion."

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688. Morning Report

Episode: AI tech giant Nvidia set to report earnings

Date: 2025-02-26 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Nvidia's upcoming fourth quarter earnings report in the context of its role as a leader in the AI revolution and market expectations for AI spending growth. The analyst highlights Nvidia as a critical barometer for AI sector performance and investor sentiment, acknowledging the competitive threat from DeepSeq.

"Nvidia is the face, the sort of golden child of the AI revolution. And the market, so much of the growth hinges around AI spending. There is no better barometer in the world than Nvidia."

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689. AI News Daily - Your Daily AI Briefing in 5 Minutes

Episode: Nvidia Export. AI Copyright. Small Models. AI Life Coach.

Date: 2025-08-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses recent developments related to NVIDIA, including the U.S. granting export licenses for NVIDIA's H20 GPUs to China, potential revenue impact due to restrictions, and security concerns raised by Chinese authorities. It briefly mentions NVIDIA's position regarding export restrictions and GPU technology specifics.

"Nvidia had expressed concerns over significant revenue losses due to these restrictions."

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690. The Last Invention is AI

Episode: $20 Billion Nvidia Power Strike: Groq Tech Duo

Date: 2026-01-06 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses NVIDIA's $20 billion non-exclusive licensing deal with Groq, highlighting the deal's valuation and implications for NVIDIA's GPU competitiveness against TPUs. It notes that NVIDIA is not acquiring Groq, indicating strategic partnership dynamics.

"Basically people are saying this is Nvidia admitting that there's no way their GPUs could keep up with TPUs."

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691. Tech Update | BNR

Episode: TSMC heeft de nieuwjaarswensen van Nvidia al binnen

Date: 2025-12-31 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses the impact of US-China tensions on Nvidia's chip supply chain, highlighting the restrictions on chip exports to China and the strategic choices Nvidia must make regarding market allocations for high-end and lower-quality chips. It addresses concerns over delivery delays to major customers and the resulting market challenges.

"Nu zal Nvidia dus moeten kiezen, gaan wij nou de hoogwaardige chips voor de Verenigde Staten of de Europese markt maken? Of laten we wat ruimte over voor die wat mindere Chinese variant?"

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692. Corporate Crime Reporter Morning Minute

Episode: Tuesday September 23, 2025 China: NVIDIA Violated Antitrtust Law

Date: 2025-09-23 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative

Listen to Episode

Summary: The podcast discusses China's initial probe finding that NVIDIA violated the country's anti-monopoly law related to its acquisition of an Israeli company and the implications for its AI chip supply to China amid U.S. restrictions.

"China said an initial probe found NVIDIA violated the country's anti-monopoly law."

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693. Beursnerd | BNR

Episode: Beurs in afwachting van Nvidia cijfers

Date: 2025-05-28 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses the anticipation of Nvidia's quarterly earnings, highlighting expected significant revenue growth of 66% driven by major AI investments from companies like Microsoft, Google, and Amazon. Nvidia is portrayed as a central figure in the AI hype, with strong interest from investors.

"De chipreuse is niet alleen een techbedrijf meer, maar het gezicht van de hele AI-hype kunnen we eigenlijk wel zeggen."

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694. BNR Headlines

Episode: Nvidia haalt Microsoft in als meest waardevolle bedrijf ter wereld
Date: 2025-06-04 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia regaining the position as the most valuable company globally, highlighting strong demand for AI chips and recent positive quarterly results. It also mentions Jensen Huang's brief video message congratulating Nintendo, a long-time partner, but does not deeply delve into Nvidia's AI strategy, supply chain, or competition.

"En dan waren er onlangs ook nog weer ronkende kwartaalcijfers. Die nog altijd illustreren hoezeer de vraag naar AI-chips blijft aantrekken."

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695. Up First AI

Episode: Nvidia Returns to China's AI Market
Date: 2025-07-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's resumption of shipping its H20 AI chips to China after regulatory issues, highlighting the significant revenue impact and the background of these developments amid US restrictions.

"Nvidia made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China."

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696. The Amazing AI News

Episode: "AI Controversy. Nvidia Triumph. Bubble Anatomy. "
Date: 2025-12-16 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent strategic moves including the acquisition of ShedMD and the launch of the NemoTron 3 AI model, highlighting Nvidia's expansion into the open-source AI field and its leadership within the AI industry.

"Nvidia emerges as a leading model creator with the launch of NemoTron 3."

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697. The John Batchelor Show

Episode: Nvidia: And the smuggling PRC. #ScalaReport: Chris Riegel CEO, Scala.com @Stratacache
Date: 2025-08-22 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Chinese regulatory actions that limit the purchase of Nvidia's AI chips by Chinese tech groups, reflecting geopolitical tensions and supply chain challenges. It includes interpretation of how these developments impact Nvidia's business dealings in China.

"We're not selling NVIDIA's highest end to China. It's not happening yet. It might, but it hasn't happened yet."

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698. Becker Business

Episode: NVIDIA Keeps Rocking & Rolling 1-10-26
Date: 2026-01-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's market position, recent investment in Intel, chip sales to China, and CEO Jensen Huang's commitment to staying in California amidst potential tax changes. It also highlights Jim Kramer's bullish stance on NVIDIA as a good investment choice.

"Jim Kramer essentially says that NVIDIA at its current price is cheap and is one of the two stocks he would double down on right now."

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699. Tech Update | BNR

Episode: Nvidia verweert zich tegen Google's AI-chips als concurrentie
Date: 2025-11-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses how Nvidia is responding to Google's entry into the AI chip market, emphasizing Nvidia's claim of technological leadership and market dominance, while noting competitors like Meta and Apple using Google's chips. The discussion highlights Nvidia's position on supply chain and competitive pressure from major tech companies developing alternatives.

"Wij als Nvidia liggen een generatie voor op de industrie. Als het enige platform dat elk AI-model kan draaien."

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700. Nvidia Stock News Tracker - Daily

Episode: NVIDIA Stock Analysis: Navigating Market Fluctuations and Future Prospects
Date: 2025-05-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent stock price movements and trading volume for NVIDIA, touching on its performance over various time frames and analysts' mixed price targets. It highlights NVIDIA's dominance in AI and strong financial performance but notes a lack of major recent announcements.

"The company's continued dominance in the field of artificial intelligence and its strong financial performance have contributed to its steady growth."

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701. Software Engineering Daily

Episode: NVIDIA RAPIDS and Open Source ML Acceleration with Chris Deotte and Jean-Francois Puget
Date: 2025-03-04 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode features two senior NVIDIA data scientists discussing GPU acceleration, the NVIDIA RAPIDS open-source AI library, and their experiences with Kaggle competitions, providing insights into practical machine learning applications at NVIDIA. The conversation does not include Jensen Huang or direct commentary on NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA RAPIDS is an open-source suite of GPU-accelerated data science and AI libraries. It leverages CUDA and significantly enhances the performance of core Python frameworks, including Polars, Pandas, Scikit-Learn, and NetworkX."

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702. FEAR & GREED | Business News

Episode: Afternoon Report | Nvidia smashes expectations
Date: 2025-08-28 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast reports on NVIDIA's recent financial results, noting strong revenue and profit exceeding expectations, but also highlights concerns over slowing growth and missed data center revenue estimates. CEO Jensen Huang's comments on AI spending potential position NVIDIA as central to the AI boom, despite mixed investor reactions.

"CEO of NVIDIA, Yensen Huang, did brush off concerns. He said AI spending could hit US$4 trillion by 2030 and that NVIDIA will remain at the centre of the boom."

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703. The Real Investment Show (Full Show)

Episode: 8-28-25 Nvidia Falls Short
Date: 2025-08-28 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent earnings report, highlighting strong revenue growth, capital expenditure expectations related to large data center buildouts by 2030, and a generally strong outlook despite the stock's slight pullback. The discussion touches on market reactions and contrasts stellar earnings with slightly underwhelming whisper numbers.

"Nvidia expects that 3-4 trillion dollars will be spent on data center build outs by 2030. That's huge, right? Because that all requires a lot of chips and a lot of CapEx being spent by companies... So it's a very strong outlook for Nvidia going forward."

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704. The Big Tech Show

Episode: Who is Jensen Huang and why has Nvidia become so powerful?
Date: 2025-11-07 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast provides a biographical and character insight into Jensen Huang, Nvidia's CEO, highlighting his background, leadership traits, and how his unique experiences contribute to Nvidia's rise as a leading AI chip company. It discusses Huang's blend of technical expertise and daring personality, which has propelled Nvidia's growth to become the world's most valuable company.

"Nvidia's 61-year-old co-founder and CEO, Jensen Huang, who has no doubt AI is about to change everything."

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705. Meet The Leader

Episode: Davos 2026: Conversation with Jensen Huang, President and CEO of NVIDIA
Date: 2026-01-23 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode features NVIDIA CEO Jensen Huang discussing the company's strong historical performance and leadership in technology and AI, highlighting NVIDIA's significant shareholder returns compared to BlackRock since their IPOs in 1999. The conversation emphasizes NVIDIA's positioning and future prospects under Huang's leadership.

""Since NVIDIA has been public, which was in 1999, same year as BlackRock... NVIDIA's total return for its shareholders has been a compounded 37%.""

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706. Schwab Network

Episode: "Cautious" Markets Follow Historic Challenger Jobs Cuts, Jensen Huang Comments
Date: 2025-11-06 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: Jensen Huang spoke about the competitive landscape of AI, acknowledging China's advantages in regulation, subsidies, and talent pool, which could impact NVIDIA's position in the AI race. The commentary reflects market reactions to his statements and their implications for NVIDIA's strategy and competitive environment.

"When he said that China is going to win the AI race, that surprised markets and shocked markets. Now, you're right. He did soften that stance a little bit, and he gave some color on why he said that."

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707. Power Lunch

Episode: Jensen Huang on Capitol Hill; Dow leads averages 12/3/25
Date: 2025-12-03 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang discusses U.S. export controls on NVIDIA chips and their implications for competition with China, emphasizing the need for competitive offerings in China without degrading chip quality. The conversation touches on national security and the impact of legislation on chip sales to China.

"I think that the current situation ensures that China and the United States agree on one thing. That no American AI chips can go to China. And I think that that's the worst case condition and is deeply unwise."

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708. AI CODZIENNIE - czyli co sychac w sztucznej inteligencji

Episode: Gates i Huang o AI, Blokady dla crawlerow AI, Mikroskop dla Claude'a
Date: 2025-03-28 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang, the CEO of NVIDIA, is discussing the future of programming, emphasizing that coding will become unnecessary as people will be able to program using natural language. He advises youth to focus on natural sciences, education, manufacturing, and agriculture, reflecting on NVIDIA's AI strategy and vision. The discussion touches on AI's impact on various professional fields but does not deeply analyze supply chain or competition.

"He stated that eventually, everyone will be able to program in plain language without knowing technical commands."

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709. Face-Off: The U.S. vs China

Episode: The Chip Whisperer
Date: 2026-01-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA, focusing on CEO Jensen Huang's role and the U.S. government's shifting policies on exporting advanced Nvidia chips to China, highlighting internal administration debates and strategic considerations regarding AI and geopolitical competition.

"David Sachs... was very supportive of allowing Nvidia to sell more powerful chips to China because he championed this idea that Jensen favored, which is persuading the Chinese to use American AI systems from Nvidia rather than choosing to develop and deploy their own systems from Huawei."

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710. San Francisco News Today | 2 Min News | The Daily News Now!

Episode: Nvidia CEO Influences Trump on Immigration, AI Bubble
Date: 2025-11-21 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang influenced political decisions regarding immigration enforcement and discussed the AI industry's transformative impact, asserting that the AI investment surge represents a fundamental change rather than a bubble. Huang also expressed pragmatic views on dealing with political figures to advance positive outcomes for San Francisco.

"He argued that the current investment surge in AI is not just hype, but a fundamental shift in computing, with accelerated computing replacing older models and generative AI transforming machine learning."

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711. The Atlantic Out Loud

Episode: The New King of Tech
Date: 2025-04-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast excerpt discusses NVIDIA's significant role in the AI industry, particularly its GPUs being foundational for large language model training. It highlights NVIDIA's evolution from a graphics card maker to a major player in the AI 'gold rush' and notes its position as the third most valuable company globally.

"For NVIDIA, the company that designs the computer chips or graphics processing units, GPUs, that many of these large language models have been trained on, it's also enormously lucrative."

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712. TechCheck

Episode: Why Trump is backing Nvidia, Plus the tech earnings mirage 04/15/25
Date: 2025-04-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses President Trump's support of Nvidia's plan to build AI supercomputers in the U.S., highlighting the expedited permit process as part of a broader favoring of Nvidia over Meta. The discussion contrasts Nvidia's effective strategy under CEO Jensen Huang with Meta's challenges and political struggles.

"President Trump writes, 'Nvidia's commitment to build AI supercomputers here in America is very big and exciting. All necessary permits will be expedited and quickly delivered.'"

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713. WSJ Tech News Briefing

Episode: TNB Tech Minute: Google to Build Data Center in Arkansas
Date: 2025-10-03 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast mentions NVIDIA CEO Jensen Huang's frustration over a delayed multi-billion-dollar deal to send NVIDIA chips to the USA, highlighting the importance of such agreements in the US maintaining leadership over China in AI. There is also reference to internal discussions involving the White House AI czar and Commerce Secretary potentially slowing the deal due to investment conditions.
"NVIDIA CEO Jensen Huang and some Trump-administration officials are frustrated by the delays on a multi-billion-dollar deal to send NVIDIA chips to the USA."

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714. No Priors: Artificial Intelligence | Technology | Startups

Episode: NVIDIA's Jensen Huang on Reasoning Models, Robotics, and Refuting the "AI Bubble" Narrative
Date: 2026-01-08 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses how AI and robotics increase productivity at NVIDIA, emphasizing that greater productivity leads to growth, profitability, and more innovation rather than layoffs. He touches on workforce challenges affecting industry sectors like factory work and trucking, indirectly linking to NVIDIA's role in automation technology.
""If NVIDIA was more productive, it doesn't result in layoffs. It results in us doing more things.""

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715. Morgans AM

Episode: Thursday, 9 October 2025: US Equity Markets Rebound
Date: 2025-10-08 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang mentions increased demand for computing over the past six months and confirms NVIDIA's involvement in funding Elon Musk's AI startup XAI, expressing excitement about the financing opportunity.
"This year, particularly the last six months, demand of computing has gone up substantially."

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716. Morgans Financial Limited (Imports from Soundcloud)

Episode: Morgans AM - Thursday, 9 October 2025
Date: 2025-10-08 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's stock rise linked to CEO Jensen Huang's comments on rising demand for computing and NVIDIA's involvement in funding Elon Musk's AI startup XAI. It also highlights the broader tech sector's strong performance but focuses primarily on NVIDIA's market momentum and CEO statements rather than detailed AI strategy or supply chain specifics.
"CEO Jensen Huang said that demand had risen in recent months, telling CNBC that this year, particularly the last six months, demand of computing has gone up substantially."

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717. Trends-Tendances

Episode: Le prix du petrole face a l'instabilite mondiale et les reformes des pensions dans Z sur 7
Date: 2025-06-17 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang, CEO of Nvidia, delivered a prominent keynote at VivaTech emphasizing Nvidia's strategic pivot towards Europe and the critical role of AI as an industrial revolution, underlining Europe's importance in Nvidia's future growth. The discussion also touches on Nvidia's alliance with Mistral AI, highlighting strategic growth initiatives in Europe.
"Jensen Huang, le patron, est vraiment devenu une rockstar dans la tech mondiale. Il avait choisi Paris et VivaTech pour marquer un grand tournant. Afficher que l'Europe devient un pilier strategique de sa croissance."

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718. Closing Bell

Episode: Closing Bell Overtime: Rally Off, Fed Focus & Nvidia takes center stage 3/18/25
Date: 2025-03-18 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent market performance following Jensen Huang's keynote at the company's developer conference, highlighting investor reactions and broader market implications. While NVIDIA's announcements were noted, the stock behavior shows selling into strength, indicating muted enthusiasm despite positive news.
"'NVIDIA, you know, could be the greatest thing since sliced bread. Jensen can say whatever he wants. But the most important thing... is the reaction to the news.'"

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719. The Rundown

Episode: Discord Confidentially Files for IPO, Elon Musk's xAI Raises $20 Billion
Date: 2026-01-07 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast highlights comments from NVIDIA CEO Jensen Huang emphasizing the growing importance of memory and storage in AI beyond just GPUs. These remarks influenced a significant rally in memory and storage stocks, signaling NVIDIA's broader

AI hardware strategy impact on the market.

"At NVIDIA's keynote at CES on Monday, Jensen stressed that AI isn't just about GPUs anymore. It's also about memory and storage. He said the storage market is largely unserved and could become one of the biggest hardware markets on the planet as AI usage expands."

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720. WSJ Tech News Briefing

Episode: Why the Next Generation of Robots Might Be Soft and Squishy
Date: 2025-05-27 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's CEO Jensen Huang's concept of sovereign AI, emphasizing how countries are investing directly in AI infrastructure rather than relying solely on companies. It covers NVIDIA's major deals with countries like Saudi Arabia, India, and the UAE and touches upon challenges from geopolitics and trade tensions affecting chip availability.

"We realize now we are an AI infrastructure company. An infrastructure company that's essential all around the world. Every region, every industry, every company will build these infrastructures."

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721. Morgans AM

Episode: Wednesday, 4 February 2026: Market Jitters: Tech Sell-Off vs Walmart's TrillionDollar Breakthrough
Date: 2026-02-03 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast reports CEO Jensen Huang's statement on NVIDIA's plan to invest in Open AI's next fundraising round, reinforcing their ongoing partnership despite market tensions, amidst a general tech sector downturn. NVIDIA's stock price fell by 2.9% following these developments.

"CEO Jensen Huang saying in an interview with CNBC that the chipmakers plan to invest in open AI remains on track following recent reports suggesting brewing tension between the two sides."

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722. The Financial Exchange Show

Episode: Google won't back down to those challenging its search dominance
Date: 2025-05-21 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's criticism of U.S. export controls restricting China's access to AI chips and the resulting acceleration of Chinese chip development. It highlights strategic implications of U.S. policies on technology transfer and competition with China.

"NVIDIA Chief Jensen Huang has condemned U.S. export controls designed to limit China's access to artificial intelligence chips as a failure."

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723. Markets & Money Today | 2 Min News | The Daily News Now!

Episode: Beijing Halts Nvidia H200 Chip Orders, Favors Domestic AI Chips
Date: 2026-01-07 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent developments involving Nvidia's H200 chips in China, including Beijing's directive to pause orders favoring domestic AI chips and remarks by Nvidia CEO Jensen Huang highlighting strong demand for these chips in China. It also mentions the U.S. government's conditions on exports of advanced chips to China, reflecting ongoing geopolitical tensions in the chip industry.

"Nvidia's chief executive Jensen Huang spoke at the Consumer Electronics Show earlier this week. He highlighted strong demand for the H200 chips in China."

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724. TBPN

Episode: Week in Review | Neuralink Raises $600M at $9B Valuation, Judge Considers Curbs for Google in AI, Jensen Huang Shifts Approach to U.S. Politics & More
Date: 2025-05-30 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's increasing involvement in political lobbying, particularly his engagements at Mar-a-Lago with former President Donald Trump to navigate challenges related to operating in China amid geopolitical tensions.

"Indeed, these, I don't even know how to say that. But the next line is interesting. NVIDIA executive, to remark on Wong's absence from the company, we see a lot less of Jensen. He's been traveling to Florida a lot."

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725. Morning Brief

Episode: CES 2026: What to expect from Nvidia CEO Jensen Huang's keynote
Date: 2026-01-02 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's upcoming keynote at CES 2026, highlighting their recent AI chip releases, push into physical AI and robotics, and expectations for announcements, while noting no high-end chip details or major product launches until the March GTC conference.

"Last year, they showed off some new gaming chips as well as a new smaller desktop size AI processing unit. They called that Digits at that

point. They since released it with various partners."

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726. China Unscripted

Episode: Why Are Billionaires So Stupid on China?
Date: 2025-11-03 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Jensen Huang's statements on US-China cooperation, emphasizing NVIDIA's advanced semiconductor chips sought by China for military use, and raises concerns about his perceived alignment with CCP interests. It touches on AI export controls and the strategic importance of NVIDIA's technology amid geopolitical tensions.
"China hawks are wrong because they they don't want us to cooperate. They don't want the U.S. and China to cooperate and they want to keep, you know, that. It specifically said, like being a China hawk should be a badge of shame."

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727. This Week in Machine Learning

Episode: Nvidia's H20 Chips Head Back to China
Date: 2025-07-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of shipping its H20 AI chips to China after regulatory restrictions, the impact on revenue, and the regulatory background. It also briefly mentions NVIDIA's AI models available on the AIbox.ai platform.
"Nvidia's is set to start shipping chips back to China again after months of this thing being in limbo. And really for the last few years, Nvidia's has been trying to figure out all the regulatory restrictions that the United States is putting on it."

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728. LLM

Episode: Nvidia's Sales Recovery in China
Date: 2025-07-21 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's renewed ability to ship AI chips to China after navigating US regulatory restrictions, highlighting the significant revenue impact this development is expected to have. It also references NVIDIA's AI models available on a third-party platform and touches on the company's recent announcements regarding their chip sales in China.
"NVIDIA is set to start shipping chips back to China again after months of this thing being in limbo, which will add billions of dollars to NVIDIA's overall revenue."

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729. Me, Myself, AI

Episode: Nvidia's China Comeback
Date: 2025-09-17 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's resumed ability to ship AI chips to China after regulatory hurdles, the impact on revenue, and provides background on the situation. It also mentions Nvidia's AI model offerings within a broader AI model platform context.
"Nvidia made this big announcement, and essentially they're able to restart the sale of their H20 AI chips to China, which is a significant development after a period of regulatory restrictions."

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730. Digital Voices: AI News, ChatGPT, OpenAI, Gemini, Claude

Episode: Tech World Reacts to Nvidia's Massive Quarter
Date: 2025-11-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings and its impact on perceptions of the AI bubble, highlighting NVIDIA's ongoing investments in major AI companies and market enthusiasm. The speaker notes CEO Jensen Huang's bullish outlook despite concerns about an AI market bubble.
"And NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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731. Na Radarze

Episode: Czy boom AI bedzie trwa? Co oznacza umowa OpenAI-AMD dla rozwoju sztucznej inteligencji w USA? | Jamal Szpalerski
Date: 2025-11-22 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the competitive landscape between AMD and NVIDIA in AI computing power. It covers OpenAI's contract with AMD and compares AMD's MI450 chip to NVIDIA's upcoming Vera Rubin chip, including technology nodes and compute power, highlighting substantial future investments in AI infrastructure.
"Z NVIDIOM mowimy tu o mocy 10 gigawatow. Czy to do tego dojdzie i kiedy do tego dojdzie, to tak jak mowie, to tez jest cos innego, inna historia piesni przyszosci."

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732. FDD's Foreign Podicy

Episode: Nvidia Games: China v. the US in AI Arms Race
Date: 2025-08-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses national security concerns regarding the US lifting export restrictions on Nvidia's H20 chips to China, emphasizing the potential impact on the AI arms race and military competition between the US and China. It includes commentary on China's capabilities and practices in AI development and data acquisition, indirectly relating to NVIDIA's strategic role.

"our experts are worried about President Trump's recent decision to lift a ban on the export of Nvidia's H20 chips to Beijing. Why might that be inadvisable? Because those chips could help the People's Liberation Army catch up in the race for military dominance and help the Chinese Communist Party beat the US in the overall artificial intelligence race."

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733. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: Nvidia Posts Record $57B Revenue, Amid AI Bubble Fears
Date: 2025-11-19 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record quarterly earnings that challenge the AI bubble fears, highlighting Nvidia's continued strong market performance and strategic investments in AI companies. The CEO, Jensen Huang, is described as bullish about the company's prospects amid market concerns.

"The founder and CEO, Jensen Huang, he seems very bullish."

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734. (Audio)NEWS/VIEWS/NOVELS

Episode: US Resumes AI Chip Sales After China Eases Rare Earth Controls - EpochTV
Date: 2025-07-17 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the resumption of Nvidia chip sales to China amid US-China trade negotiations and rare earth supply chain initiatives, including insights from Nvidia CEO Jensen Huang on China's rapid AI technology advancements.

"NVIDIA CEO Jensen Huang shared his thoughts on China. China is moving incredibly fast because the model layer with DeepSeq and Alibaba QN and Moonshot, Kimi, right? All excellent technologies."

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735. The Future of Everything News

Episode: Billion-Dollar AI Power Plays: Nvidia's Startup Strategy
Date: 2026-01-07 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's extensive AI venture investments during 2024, highlighting its strategy of funding startups that in turn purchase GPUs from Nvidia, emphasizing Nvidia's significant role and growth in the AI sector since the launch of ChatGPT.

"Nvidia has made over 67 venture deals, with over 54 of them across all of 2024, involving investments in companies that effectively circle money back to Nvidia to buy GPUs for AI compute."

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736. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity by 5 gigawatts, highlighting the partnership and its significance for AI infrastructure growth. The conversation includes context on CoreWeave's situation and NVIDIA's role in accelerating AI infrastructure expansion.

""$2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute. This is an absolutely massive deal.""

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737. AI Breakdown

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity by 5 gigawatts, highlighting the significance of the deal and NVIDIA's close relationship with CoreWeave as a data center operator.

"NVIDIA just made a massive $2 billion investment in CoreWeave to add 5 gigawatts of AI compute, which is a huge deal and shows their commitment to expanding AI infrastructure."

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738. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic partnership and expansion of AI infrastructure.

"NVIDIA has just made a $2 billion investment deal towards CoreWeave, who has a ton of debt, to add 5 gigawatts of AI compute, which is an absolutely massive deal."

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739. The Elon Musk Update

Episode: The Truth Behind Nvidia's Export Control Strategy
Date: 2025-08-09 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses allegations of smuggling high-performance NVIDIA AI chips to China, focusing on the U.S. government's concerns and the broader implications for NVIDIA's chip export control strategy amid the AI race with China.
"Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were NVIDIA chips."

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740. Strict Scrutiny

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting this as a significant deal that strengthens their relationship with a data center operator involved in AI infrastructure growth.
"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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741. Runway AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand their AI compute capabilities, highlighting the significance of the deal in the AI infrastructure space and indicating a close relationship between NVIDIA and CoreWeave.
"So what was really impressive to me is my NVIDIA, of course, just like the price tag on this is $2 billion for CoreWeave."

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742. The Twenty Minute VC (20VC): Venture Capital | Startup Funding | The Pitch

Episode: 20VC: Why Google Will Win the AI Arms Race & OpenAI Will Not | NVIDIA vs AMD: Who Wins and Why | The Future of Inference vs Training | The Economics of Compute & Why To Win You Must Have Product, Data & Compute with Steeve Morin @ ZML
Date: 2025-02-24 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's focus on CUDA and compute ownership in the context of AI, contrasting its position with Google and OpenAI, and explores infrastructure strategies relating to AI inference and training. The conversation touches on NVIDIA's role in AI compute but is broader than just NVIDIA itself, including other players and technology.
"The thing with NVIDIA is that they spend a lot of energy making you care about stuff you shouldn't care about."

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743. AI Fire Daily

Episode: EP 197: Claude Drove on Mars, GPT4o Fans Revolted, and AI Is Hitting a Wall
Date: 2026-02-03 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses generally about AI hardware limitations, particularly focusing on memory constraints in AI agents rather than compute power, referencing NVIDIA chips as part of the broader infrastructure but without direct detailed commentary on NVIDIA's AI strategy, supply chain, or competition from Jensen Huang or insiders.
"The misconception is that we just need more power, faster GPUs, more NVIDIA chips. Yeah. Bigger numbers. Exactly. Everyone thinks throw more compute at it, but the source material is very clear. We are hitting a memory wall."

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744. Anthropic

Episode: Microsoft Blindsided by OpenAI's $12B CoreWeave Deal
Date: 2025-04-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses CoreWeave's significant growth in GPU provisioning, its relationship with NVIDIA (who holds a 6% stake), and the use of NVIDIA GPUs by CoreWeave as a cloud service provider focused on AI. It highlights NVIDIA's role as a strategic investor and supplier within the AI compute infrastructure ecosystem but doesn't cover Jensen Huang's statements or detailed NVIDIA strategy.
"This isn't a company that is just kind of come out of obscurity. They're backed by NVIDIA. NVIDIA owns about 6% of CoreWeave. And essentially, this is an AI specific cloud service provider operating over 250,000 NVIDIA GPUs."

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745. Bloomberg Intelligence

Episode: Trump Nvidia Deal Reshapes US's China Strategy
Date: 2025-12-09 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the evolving US policy under President Trump allowing Nvidia to sell certain H200 chips to China, highlighting that these chips are less advanced than Nvidia's latest models and that China may impose limits on their usage.
"President Trump has now opened the door to Nvidia selling some of its high end chips to China."

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746. GoodNightCoffee

Episode: ():,OpenAI,xAISpaceX
Date: 2026-01-30 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's potential involvement in a major financing round for OpenAI, highlighting its dominant position in the AI computing chip market and the competitive landscape of AI investments. It emphasizes NVIDIA's strategic role but lacks detailed commentary from company insiders or Jensen Huang specifically.
"The possible participation of chipmaker NVIDIA is particularly noteworthy, given its dominant position in the AI computing chip market."

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747. Mac OS Ken

Episode: Analysts Says Apple No Longer Anchors Supply Chain - MOSK: 01.19.2026
Date: 2026-01-19 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the shift in supply chain dynamics, highlighting NVIDIA's growing importance at TSMC compared to Apple, with NVIDIA reportedly surpassing Apple as a major customer, reflecting strong growth driven by AI processor demand in data centers.
"Apple is fighting for TSMC capacity as NVIDIA takes center stage."

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748. Nvidia Stock News Tracker - Daily

Episode: Nvidia's AI Dominance Fuels Bullish Forecasts Despite Supply Chain Challenges
Date: 2026-01-20 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's current stock performance, its significant market capitalization, bullish forecasts driven by AI and data center revenue, notable partnerships, and supply chain challenges impacting chip sales to China. Analysts remain optimistic with raised price targets despite short-term geopolitical risks and supply issues.
"Nvidia's day-eye dominance drives optimism, despite short-term hurdles like supply issues."

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749. The John Batchelor Show

Episode: PREVIEW HEADLINE: Experts Warn of US Vulnerability Due to Reliance on Taiwan for High-End AI Chips GUEST NAME: Brandon Weichert SUMMARY: Brandon Weichert discussed House Oversight Committee testimony detailing US vulnerability regarding high-end AI chips.
Date: 2025-10-03 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses U.S. vulnerabilities in the supply chain for high-end AI chips, highlighting Taiwan's critical role and the potential risks of disruptions. It mentions NVIDIA in the context of U.S. export controls and trade negotiations with China, emphasizing the need for legislative action to secure the domestic AI chip supply.
"They were saying, hey, we need a new CHIPs Act that's more comprehensive. And we also need to incorporate language into the next round of budgeting bills that basically prevents things like NVIDIA being able to sell their higher end chips to China."

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750. Nvidia Stock News Tracker - Daily

Episode: Nvidia Soars on AI Demand, Operational Improvements Ahead of Q2 Earnings
Date: 2025-08-22 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast provides an overview of recent stock trading activity and analyst upgrades for Nvidia, highlighting expectations of strong sales growth driven by AI demand and improved supply chain execution ahead of quarterly earnings. Increased call option volumes and institutional buying reflect growing confidence in Nvidia's market position.
"KeyBank has lifted its price target from $190 to $215 US dollars, anticipating robust sales growth resulting not just from artificial intelligence demand, but also stronger than expected manufacturing yields and improved supply chain execution."

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751. Marketplace Tech

Episode: Bytes: Week in Review - Saudi Arabia bets billions on AI
Date: 2025-05-16 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The discussion centers on U.S. export controls affecting NVIDIA's advanced AI semiconductor chips and the impact on China-U.S. tech competition, including China's push for developing domestic chips. It touches on market responses and geopolitical trade

tensions influencing NVIDIA's chip distribution.

"And now the big question is really where China and the U.S. stand when it comes to getting access to those very coveted NVIDIA chips."

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752. The AI Cookbook: AI Tools | Enterprise AI | Leadership

Episode: E78: Chip Wars 2.0: US-China AI Supply Chain Crisis, Gemini & Microsoft Talent | Weekly AI
Date: 2025-10-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the impact of geopolitical tensions and tariffs on NVIDIA and other semiconductor companies, including specific measures like NVIDIA and AMD striking a deal to pay 15% of their China AI chip sales revenue to the U.S. government as a form of insurance amid export restrictions.

""NVIDIA and AMD even went ahead and struck a deal to pay 15% of their China AI chip sales directly to the U.S. government. That is a sort of insurance.""

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753. World Business Report

Episode: Nvidia and AMD to give 15% of China chip sales to US
Date: 2025-08-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a new deal whereby Nvidia and AMD will pay 15% of their China sales revenues to the US government in order to continue selling chips, including Nvidia's advanced H20 chips, to China despite previous export bans. This reflects ongoing trade and supply chain challenges related to geopolitical tensions.

"Both Nvidia and AMD will indeed be paying 15% of the revenues that they make from selling chips to China to the US government."

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754. Connecting the Dots

Episode: Connecting the Dots - 3-20-2025
Date: 2025-03-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA as one of the four dominant companies controlling the AI supply chain, highlighting its role in designing processors critical for modern AI applications like ChatGPT, alongside SK Hynix, TSMC, and ASML. It notes the market concentration and potential influence these companies have on pricing and technology in the AI hardware sector.

"Bloomberg reports they control anywhere from 80% to 100% of the market for like the key parts of AI chip development. So NVIDIA, they design the processors."

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755. THE MORNING BRIEF

Episode: Latest business news with Ntaoleng Lechela - Business Reporter
Date: 2025-10-29 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses a collaboration between Palantir and NVIDIA that combines NVIDIA's AI chips and software with Palantir's data platforms to help businesses make faster, smarter decisions, particularly in addressing supply chain disruptions.

"Palantir mentioned that one of the challenges it would resolve in supply chain disruptions would be something like when there's a storm delay affecting shipments. NVIDIA's AI can instantly suggest new routes, compare costs and adjust for customer demand allowing companies to re-optimize logistics every hour or so."

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756. Invest Like the Best with Patrick O'Shaughnessy

Episode: Dylan Patel - Inside the Trillion-Dollar AI Buildout - [Invest Like the Best, EP.442]
Date: 2025-09-30 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode features Dylan Patel, a semiconductor analyst, discussing NVIDIA's role in the AI infrastructure build-out, including its strategic relationships with OpenAI and Oracle and the broader industrial and supply chain complexities involved in AI development.

"You've got Oracle paying NVIDIA lots of money. You've got NVIDIA paying OpenAI lot"

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757. Schwab Network

Episode: CRWV Earnings Preview & A.I. CapEx Outlook
Date: 2025-11-10 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The mention discusses NVIDIA CEO Jensen Huang's comments about supply constraints from Taiwan Semiconductor, emphasizing supply chain complexities and current bottlenecks, especially around power availability, impacting NVIDIA's AI hardware production capacity plans.

"I'm sure it came across your radar with NVIDIA CEO Jensen Wong saying they need more supplies from Taiwan Semi."

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758. TechCrunch Daily Crunch

Episode: X usage is down and competition is growing
Date: 2025-07-11 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's strategy to sell AI chips in China despite U.S. export restrictions, including plans to launch a modified AI chip based on the Blackwell RTX Pro 6000 processor for the Chinese market. It also mentions the impact of export controls on NVIDIA's revenue forecasts and competition from Chinese firms like Huawei.

"NVIDIA is planning to launch an AI chip specifically for the Chinese market as early as September, based on the Blackwell RTX Pro 6000 processor, modified to meet existing AI chip restrictions."

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759. The John Batchelor Show

Episode: Deepseek's AI Claims, Huawei's Chip Ambitions, and US/China Tech Competition Chris Riegel analyzed the escalating tech competition between the US and China, focusing on Chinese AI firm Deepseek and noting its claims of superiority were potentially mislea
Date: 2025-10-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses a Chinese AI firm Deepseek's claims and how they relate to NVIDIA's technology, suggesting that Deepseek uses NVIDIA's chips and thus the perceived threat may be overstated. It touches on supply chain implications and U.S.-China tech competition involving NVIDIA.

"It's clear that Deepseek was both using tech from NVIDIA in certain points and other points maybe borrowing models from others or doing work based on work done by others."

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760. Digital Voices: AI News, ChatGPT, OpenAI, Gemini, Claude

Episode: NVIDIA Halts H200 Chip Sales to China
Date: 2026-01-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent tightening of sales terms for its advanced H200 AI chips in China, including upfront payment requirements and concerns about government intervention affecting chip orders. It also highlights NVIDIA's expanding presence across industries like construction and nuclear fusion in the AI sector.

"Right now they are tightening their grip on how their most advanced chips are sold in China."

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761. The AI Podcast

Episode: NVIDIA Restricts China's Access to H200 Chips
Date: 2026-01-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's new policy requiring Chinese customers to pay upfront for their advanced H200 AI chips amid high demand across industries. It touches on implications for NVIDIA's sales strategy and supply chain tightening in China, referencing anonymous sources and market dynamics.

"NVIDIA is tightening their grip on how their most advanced chips are sold in China. They're now requiring Chinese consumers or customers... to pay the full cost up front for their H200 AI chips."

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762. The Last Invention is AI

Episode: DeepSeek Threatening Nvidia: US Gov Responds
Date: 2025-02-21 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses the impact of a new AI competitor, DeepSeek, on NVIDIA's stock price, focusing on how DeepSeek's comparatively low training costs have affected market perception of NVIDIA. The discussion includes some analysis of DeepSeek's capabilities, investment comparisons, and implications for NVIDIA's AI strategy and competition.

"This essentially tanked the price of NVIDIA. If you look at..."

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763. AI Applied: Covering AI News, Interviews and Tools - ChatGPT, Midjourney, Gemini, OpenAI, Anthropic

Episode: Apple Eyes AI Acquisitions to Boost Siri
Date: 2025-11-06 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the competitive landscape of AI chip development, highlighting NVIDIA's dominance and the challenges other companies face in catching up despite designing their own chips. It notes that NVIDIA's products are significantly ahead, making it difficult for competitors to displace them in the AI chip market.

"Honestly, NVIDIA is going to be really hard to catch up to because anyone that says they're building their own chips, they have to design their own chips... by the time they finish building out their production, five years later, like no one even thinks about their chips anymore."

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764. Hong Kong Today

Episode: Thursday
Date: 2025-07-17 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang, NVIDIA's CEO, spoke at the China International Supply Chain Expo praising Chinese AI innovation and highlighting NVIDIA's developer ecosystem in China. He discussed the role of Chinese AI in global progress and announced resumption of sales of NVIDIA's H20 AI chips to China following eased U.S. export restrictions.
"China's open-source AI is a catalyst for global progress, giving every country and industry a chance to join the AI revolution."

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765. Limitless Podcast

Episode: Google's New AI Chip Could Actually Dethrone Nvidia (Ironwood v7 TPU)
Date: 2025-12-02 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast episode discusses Nvidia's significant recent market cap loss, suggesting that its monopoly in AI chip technology might be challenged by Google's new TPU v7 chip. The discussion centers on Nvidia's market position and competition, indicating challenges to its dominance.
"One of the most famous investors in the world, Peter Thiel, he wrote a book called Zero to One... it's all about monopolies and how much of an advantage having a monopoly has in the world. Now, what we've seen recently is a company named Nvidia reaching a $5 trillion monopoly... but something is happening. Something is wrong. It appears as if that monopoly is starting to slip out of their hands."

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766. Trappin Tuesday's

Episode: Apple Picked Google Gemini. Bad News for Nvidia?
Date: 2026-01-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's current competitive position in the AI and chip market, noting that while NVIDIA remains a strong player, increasing competition from Google, Apple, Tesla, and others is challenging its dominance. The speaker reflects on market leadership shifts and hints at supply chain and strategic pivots by competitors, implying pressure on NVIDIA's future growth.
"You gotta think about it, bro. I think that Google has positioned itself... Tesla saying, we not about to get your chips... you got so many AVGO saying, we about to make chips that's better than them and we can do it."

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767. Schwab Network

Episode: ORCL's TikTok Connection & NVDA's Uphill Battle in China
Date: 2025-09-16 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's challenges in China related to trade tensions and the fluctuating availability of their specialized GPUs like the RTX 6000D, which has seen low demand potentially leading to a large inventory buildup. The conversation highlights Nvidia's efforts to comply with regulations by producing China-specific GPUs amid shifting US-China trade policies.
"Nvidia may be on track to produce between around one and a half to two million of these GPUs by the end of this year, potentially leaving it sitting on a huge stack of these unwanted cards."

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768. Strategy Simplified

Episode: S18E8: NVIDIA Beats and Avocado Supply Spurs Demand (Market Outsiders: May 29, 2025)
Date: 2025-05-29 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent earnings with a focus on key business segments like data center revenue, mentioning insights from the Wall Street Journal and providing a general perspective on NVIDIA's business performance. However, the discussion does not deeply cover Jensen Huang's comments or detailed AI strategy, supply chain, or competition.
"I just wanted to quickly touch on NVIDIA's earnings that came out yesterday. So I'll start our conversation there, and this is not going to be a deep dive into their earnings."

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769. The John Batchelor Show

Episode: 26: Professor Epstein Slams Trump's Economic Policies as 'State Socialism'. Professor Richard Epstein analyzes four Trump administration economic decisions concerning Intel, Nvidia, US Steel, and MP Mining, labeling them forms of state-owned enterprise or "st
Date: 2025-10-25 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Professor Richard Epstein discusses NVIDIA's strong market position and innovation, noting its expansion into chip production, data centers, and fabs, and mentions a purported deal involving Jensen Huang related to revenue sharing from sales to China, highlighting concerns about government involvement and transparency.
"NVIDIA, the most valued company on Wall Street by far. NVIDIA possessing not only the chips that everybody desires right now, but next and next and next. And it is moving into not only making the chips, but also producing the data centers and the fabs, everything to build the chips."

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770. Fearless AI

Episode: Nvidia Surpasses $57B Revenue as Bubble Worries Rise
Date: 2025-11-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record-setting quarterly earnings amidst AI bubble concerns, highlighting the company's continued market rally and investments in major AI companies. The host mentions Nvidia's CEO Jensen Huang as bullish, contributing to cautious optimism about Nvidia's AI strategy and market position.
"The founder and CEO, Jensen Wang, he seems very bullish."

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771. Geopolitical Economy Report

Episode: China is winning AI race, Nvidia says, as OpenAI begs US gov't for bailout
Date: 2025-11-08 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Jensen Huang's remarks that China is winning the AI race and highlights NVIDIA's rapid market cap growth amid concerns of an AI market bubble. It also notes that while many AI projects are failing, NVIDIA remains highly profitable by supplying crucial AI hardware.
"Now, Nvidia has become the most valuable corporation on earth, at least by market capitalization. Its market cap is now 5 trillion US dollars."

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772. Sip&Talk| Sunny & Joe

Episode: The AI Arms Race: Jensen Huang's Infrastructure Empire Meets Sam Altman's AGI Imperative EP415-2
Date: 2025-10-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's role in the AI infrastructure race, focusing on Jensen Huang's leadership in building AI hardware and its strategic importance in the global competitive landscape. The conversation touches on the broader AI ecosystem, including competition with OpenAI and geopolitical implications, without deep technical or strategic details specifically from Huang.
"We're talking AI, the infrastructure underneath it, national strategies, the works. Right. It's not just about who has the smartest algorithm anymore. It's about who controls the chips, the data centers, the energy, basically the foundations of the future, a fight for dominance."

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773. Squawk Box Europe Express

Episode: Nvidia earnings to show U.S.-China export hit
Date: 2025-05-28 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's upcoming earnings report with a focus on the impact of US government export restrictions to China generating a $5.5 billion write-down. It highlights NVIDIA's role in the AI chip market and its influence on tech stocks, while also mentioning investor concerns around margins and demand.
""Investor tension will be focused on how it swallows a recent $5.5 billion write-down related to US government curbs on chip exports to China, putting one of the world's largest companies by market cap at the centre of President Trump's trade war.""

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774. Headline News

Episode: Military intervention an option to acquire Greenland: White House
Date: 2026-01-07 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the growth of open-source AI models and announces that NVIDIA's Rubin AI computing platform is in full production. He emphasizes the role of Chinese and Chinese-linked partners in the company's supply chain and highlights accelerated AI deployment across industries.
"NVIDIA CEO Jensen Huang has highlighted the rapid rise of open-source AI models such as DeepSeq R1 and revealed that the chipmaker's Rubin AI computing platform is in full production."

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775. Silicon Siege: China's Tech Offensive

Episode: Silicon Siege: US-China Hacker Olympics Heat Up! Spy Games, Shady Deals, and Quantum Fears
Date: 2025-08-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses cybersecurity challenges involving NVIDIA, including US efforts to track shipments of NVIDIA servers to East Asia and Jensen Huang's denial of chip diversions, highlighting supply chain security concerns and espionage risks related to NVIDIA's AI chips.
"NVIDIA CEO Jensen Huang, for his part, is busy denying any advanced chips are slipping past bans."

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776. Squawk Box Europe Express

Episode: Fed Res stays put on rates
Date: 2025-03-20 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the company's significant investment plans in AI infrastructure, highlighting a $150 billion commitment as part of a larger multi-trillion dollar AI infrastructure journey. This indicates strong confidence in the firm's AI strategy and growth prospects.

"We're building AI infrastructure for the world. And it is very clear now that we're about $150 billion of AI infrastructure into a journey of trillions of dollars of infrastructure. We've got a lot of AI to build."

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777. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: Half of Employees Still Hiding AI from Their Bosses (And It's Their Bosses Faults)
Date: 2025-05-02 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's comments on the China-US AI competition, emphasizing that China is not behind NVIDIA but rather closely trailing, and that the AI race is a long-term, ongoing competition. Huang acknowledges China's significant technical capabilities and researcher population, indicating a competitive but realistic view of the AI landscape.

"China is not behind. China is right behind us. I mean, we're very, very close. But remember, this is a long term, this is an infinite race."

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778. Bloomberg News Now

Episode: Nvidia to Resume Chip Sales to China, Bank Earnings Preview, More
Date: 2025-07-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's plan to resume sales of its H20 AI chips in China, following a recent reversal in US export restrictions. It highlights the impact on NVIDIA's stock price and mentions CEO Jensen Huang's attendance at a supply chain conference in China.

"NVIDIA put out a blog post saying they will, in short order, be able to resupply these H20 chips into the Chinese market, where the CEO, Jensen Huang, currently is for a supply chain conference."

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779. AI in Flow

Episode: Apple Reboots Siri and Bets on Wearables
Date: 2026-01-22 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's CEO Jensen Huang's comments at Davos, emphasizing AI's role in boosting productivity rather than replacing jobs and highlighting infrastructure like power and GPUs as the real constraints in AI development. It notes the growing competition and importance of upskilling in the AI and robotics sectors.

"Huang was super clear. AI boosts productivity across skilled jobs, but the real constraint is infrastructure, not models. Power, GPUs, talent."

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780. MRKT Matrix

Episode: Stocks Rise, Ignoring Government Shutdown
Date: 2025-10-01 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The discussion highlights NVIDIA's challenges due to U.S. export restrictions impacting its long dominance in China, with CEO Jensen Huang lobbying in both Beijing and Washington to preserve market access. It also mentions the risk of Chinese AI chip competitors emerging, potentially threatening NVIDIA's global leadership and revenue.

""CEO Jensen Huang has traveled frequently to both Beijing and Washington, lobbying to preserve NVIDIA's market. But Chinese firms are building capacity and recruiting NVIDIA engineers to build a rival ecosystem.""

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781. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: AI Competition Shifts From Model to App Layer
Date: 2025-05-13 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Jensen Huang's remarks on the rapid advancement of Chinese AI technology and highlights the competitive landscape in AI, emphasizing the need for US innovation and infrastructure to maintain leadership. It references NVIDIA's proprietary CUDA ecosystem indirectly through AMD's comments on open ecosystems.

"NVIDIA CEO Jensen Huang recently said the world of AI fundamentally changed this year due to Chinese technology catching up quickly."

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782. Choses a Savoir TECH

Episode: OpenAI sur le point de sortir sa propre puce avec TSMC ?
Date: 2025-02-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's dominant position in the AI chip market powering major AI models and the emerging competition from companies like OpenAI developing their own AI chips with TSMC, Broadcom, Intel, Google, and Microsoft also entering the space. It highlights NVIDIA's current lead in performance and reliability but notes potential shifts if competitors succeed.

""Nvidia domine le secteur de l'intelligence artificielle, fournissant les puces indispensables aux fermes de serveurs qui alimentent des chatbots comme ChatGPT... Aucun de ses concurrents n'a reussi a egaler Nvidia en termes de performance et de fiabilite.""

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783. The neXt Curve reThink Podcast

Episode: Silicon Futures for May 2025 (Microsoft Build, Humain, Computex and more!
Date: 2025-06-01 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses a partnership announcement between NVIDIA and Cadence, highlighting the integration of NVIDIA's Blockwell platform in Cadence's new silicon and the collaboration on digital twin technology for system design. Jensen Huang's involvement in promoting this partnership is noted, emphasizing NVIDIA's role in AI-driven supercomputing and system design automation.

"This was an announcement that was accompanied by a seemingly omnipresent appearance by Jensen Huang, who joined Anurud, who was the CEO of Cadence, to announce his partnership as well as product."

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784. Breaking News To Trading Moves

Episode: The Arm Architecture: AI Momentum and Chip Market Shifts
Date: 2026-02-05 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the role of NVIDIA in AI data center computing, highlighting how its GPUs paired with ARM-based CPUs (as in the Grace Hopper super chip) position it well to benefit from the growth of ARM-based server architectures. This integration supports NVIDIA's competitiveness in AI infrastructure and data centers.

"NVIDIA is betting that the CPU handling the traffic for their massive graphics cards should be ARM-based. So if the ARM ecosystem grows, NVIDIA's integrated products fit better into more data centers."

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785. TechLinked

Episode: A Very Special TechLinked Christmas (Boxing Day) Special 2025
Date: 2025-12-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA CEO Jensen Huang's CES 2025 keynote where he announced the RTX 50 series GPUs and DLSS 4 with multi-frame generation, highlighting significant performance gains but also mentioning backlash over benchmarks, hardware issues, and price inflation. It also notes NVIDIA's milestone as the world's most valuable company reaching a $5 trillion market cap, while acknowledging mixed consumer reactions and competitive pressures from AMD.

"Overall, a lot of jacket talk. But Jensen did, amid a slew of AI and automotive gunk, announced the RTX 50 series GPUs and DLSS 4 with multi-frame generation. They represented massive performance gains over the 40 series."

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786. All TWiT.tv Shows (Audio)

Episode: Windows Weekly 951: The ODBC of AI
Date: 2025-09-24 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $100 billion investment in OpenAI as a strategic financial move, suggesting it is primarily a 'shell game' to improve balance sheets rather than a substantive technological investment, with some context on competition with other companies like Oracle's Ellison and Microsoft's AI initiatives.

""Nvidia announced a $100 billion investment in open AI... it's just a shell game, and this is just banking shell game for tax purposes and to make your balance sheet look good.""

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787. Wall Street mit Markus Koch - featured by Handelsblatt

Episode: Reaktion auf Ergebnisse uberwiegend flau | Eli Lilly fest. AMD schwach
Date: 2026-02-04 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's recent comments emphasizing Nvidia's substantial investment in OpenAI and the solidity of their partnership, amidst ongoing AI market uncertainties. It highlights the impact of AI developments on Nvidia's stock and infrastructure importance without deep dive into supply chain or competition.

"Einmal diese Unsicherheit zu Nvidia OpenAI. Hier hat sich erneut Jensen Huang zu Wort gemeldet. Er betont, dass man bei der nachsten Finanzierungsrunde uber 20 Milliarden Dollar in OpenAI investieren wird."

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788. The Financial Exchange Show

Episode: Can Nvidia save GM?
Date: 2025-03-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's plan to invest hundreds of billions of dollars in U.S. chip manufacturing to reshape the company's supply chain away from Asia amid tariff threats. The discussion also highlights challenges such as limited U.S. manufacturing capacity and skill sets for semiconductor production.

"NVIDIA will spend hundreds of billions of dollars on chips and other electronics manufactured in the U.S. over the next four years as the company tilts its supply chain back from Asia in the face of Donald Trump's tariff threats."

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789. Hard Fork AI

Episode: Nvidia Announces $57B Revenue and Sparks Market Tension
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record-setting quarterly earnings and the CEO Jensen Huang's optimistic stance on AI, highlighting Nvidia's influential investments in major AI companies which continue to drive market confidence. The episode addresses market skepticism about an AI bubble and Nvidia's role in sustaining the rally.

"The founder and CEO, Jensen Wang, he seems very bullish."

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790. Club de lectura de MPF

Episode: The NVIDIA Way | Tae Kim
Date: 2025-03-28 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast provides an introductory discussion about NVIDIA and its CEO Jensen Huang, highlighting the company's recent significant growth and status as the most valuable company globally as of mid-2024. It focuses on explaining why NVIDIA and Huang have gained notable attention in recent years.

"Por que NVIDIA anda tan de moda por estos ultimos meses? Incluso en el ultimo ano."

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791. The Financial Exchange Show

Episode: Is China getting close to finding its own Nvidia?
Date: 2025-08-28 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent earnings report, highlighting revenue and net income figures, market reactions, and analyst expectations. It notes that while earnings met expectations and showed growth, the stock price did not significantly rise, reflecting market pricing of anticipated growth.

"Nvidia reported earnings a little bit after the bell yesterday... sales during the most recent quarter hit $46.7 billion, basically in line with analyst estimates... net income rose to $26.4 billion, a 59% growth rate compared to the prior year."

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792. Rob Black Show

Episode: Nvidia Information You Should Know
Date: 2025-09-19 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's stock performance relative to other AI and semiconductor companies, noting a recent slowdown in stock gains and falling GPU rental prices. It provides a sector overview rather than direct insights from Jensen Huang or detailed strategy commentary.

"Since JetGPT was introduced back in November of 2022, Nvidia has gone up 982%. Not too shabby. Nvidia's footing has already looked increasingly shaky though in recent weeks compared to other AI-linked stocks."

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793. Squawk Box Europe Express

Episode: Geopolitics, Oil, Nvidia
Date: 2026-01-07 | Relevance: 65/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang, NVIDIA's CEO, reveals CNBC that export licensing for the H-200 AI chip with the White House is nearly finalized, highlighting NVIDIA's focus on production and expansion towards China. The discussion points to strong Chinese demand and the company's strategic positioning amidst geopolitical considerations.

"Nvidia fires up production of its H-200 ships with its sights set on China. As CEO Jensen Huang tells a Las Vegas audience its export licensing agreement with the White House is almost done."

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794. Morgans Financial Limited

Episode: Morgans AM - Wednesday, 4 February 2026
Date: 2026-02-03 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's stock performance amid broader market declines and includes statements from CEO Jensen Huang about NVIDIA's ongoing investment plans in OpenAI, emphasizing the scale of OpenAI's fundraising. It briefly touches on NVIDIA's market capitalization relative to other companies but does not delve deeply into AI strategy, supply chain, or competitive analysis.

"CEO Jensen Huang saying in an interview with CNBC that the chipmaker's plan to invest in open AI remains on track following recent reports suggesting brewing tension between the two sides."

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795. Sur le fil

Episode: Nvidia, ce geant mondial de la tech si discret
Date: 2025-07-17 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode provides a detailed profile of Nvidia's growth and market dominance, highlighting its breakthrough valuation and key role in AI-driven graphics processing. It mentions Jensen Huang's early vision and the company's strategic significance in the global tech ecosystem.

"Le 9 juillet, le fabricant americain de cartes graphiques Nvidia a battu un record historique en franchissant le seuil des 4000 milliards de dollars de valorisation boursiere."

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796. The Last Invention is AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, providing context on CoreWeave's situation and their close relationship with NVIDIA. The mention focuses on the scale and implications of this investment for AI infrastructure growth over the next decade.

"NVIDIA just like the price tag on this is $2 billion for CoreWeave and I think they already had quite a close relationship because CoreWeave is you know a data center operator and they're trying to very quickly grow a lot of their AI infrastructure footprint over the next 10 years."

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797. Acquired AI

Episode: Tesla's In-House Chips vs. NVIDIA
Date: 2025-08-02 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Tesla's shift from NVIDIA's Drive platform to their own custom chips since 2019 and highlights the significance of AI chips in Tesla's vehicles and robotics efforts, noting NVIDIA's earlier role but focusing more on Tesla's internal developments and partnerships with Samsung.

"Tesla actually switched from NVIDIA's drive platform to their own custom chip back in 2019."

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798. The Tech Strategy Podcast

Episode: Understanding AI Infrastructure Part 1: Apps + AI, Saas + AI and AI Data Centers (265)
Date: 2025-10-27 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the core components of AI data centers, emphasizing the critical role of NVIDIA GPUs in high-performance AI supercomputers and data centers, alongside considerations about energy, cooling, and networking requirements. It references NVIDIA's importance in compute power without specific details on strategy or competition.

""Everything, everyone's talking about how many NVIDIA GPUs is in this one versus that one. Okay, the compute is obviously the biggest thing.""

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799. CyberHub Podcast

Episode: Nvidia Riva Vulnerability, GitHub Supply Chain Attack, Telecom Cyber Espionage, Superblack Ransomware
Date: 2025-03-17 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions recently discovered vulnerabilities in NVIDIA's RIVA AI services and the importance of patching these security issues, highlighting potential risks in their AI technology infrastructure.

"NVIDIA patching a couple of RIVA vulnerabilities that could allow attackers to abuse AI services."

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800. Supply Chain Connect

Episode: Tariffs and the Semiconductor Supply Chain
Date: 2025-02-17 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion focuses on the impact of tariffs and trade policies on the semiconductor supply chain, highlighting how technology limiting strategies affect companies like NVIDIA, particularly in AI and custom silicon markets, and how supply chain strategies are adjusting accordingly.

"And the ones that everybody follows really closely are AI and AI-related. So NVIDIA chips, custom silicon, those types of things."

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801. Innovation in Compliance with Tom Fox

Episode: Navigating the Future of Supply Chain Compliance with Travis Miller
Date: 2025-11-18 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The speaker discusses NVIDIA as a key infrastructure partner supplying critical AI chips and GPUs, emphasizing the strategic importance of supply chain compliance and acquisition of finite resources, highlighting NVIDIA's pivotal role in the AI industry's supply chain strategy.

"Take, for example, NVIDIA, the most valuable company in the world. They are not making the AI a lot of the time. They're the infrastructure partner that's supplying that commodity, those critical chips, those critical GPUs."

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802. Thailand Explained

Episode: Thailand in Crosshairs of New U.S. AI Chip Ban
Date: 2025-07-06 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses U.S. AI chip export restrictions targeting Malaysia and Thailand, specifically affecting advanced NVIDIA AI chips like the H100, highlighting geopolitical and supply chain challenges for the company.

"Under that earlier framework, Malaysia and Thailand were classified as tier two countries, which meant they were subject to pretty stringent controls requiring specific export licenses for the really advanced AI cheeks, like NVIDIA's H100 or AMD's MI300X."

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803. AI News Tracker

Episode: Navigating the Shifting AI Landscape: Resilience, Partnerships, and the Pursuit of Practical Gains
Date: 2025-11-06 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's role as a key hardware provider in major AI infrastructure deals, notably its partnership with OpenAI alongside other chip manufacturers, highlighting its importance in AI supply chains and competitive positioning.

"OpenAI has emerged as the central player, signing a 7-year $38 billion cloud partnership with Amazon Web Services to secure hundreds of thousands of advanced NVIDIA GPUs for frontier model training."

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804. The Ominous CCP Factor and the Destructive CCP Model(Audio) + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry landscape, mentioning NVIDIA as one of the fabless manufacturers specializing in chip design but not fabrication. It touches on the supply chain dynamics and US export controls affecting advanced semiconductor manufacturing relevant to NVIDIA's operational context.

"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabless manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

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805. Know Your Risk Podcast

Episode: Nvidia Is Dominating
Date: 2025-11-25 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses concerns about NVIDIA facing legitimate competition affecting its market share and margins, leading to a short position. It highlights potential margin pressure due to pricing competition but acknowledges NVIDIA's historical dominance in chip sales.

"I think what was in the price of NVIDIA was them dominating chip sales and keeping really robust margins for years to come. So if all of a sudden they don't just have competition, but kind of legit competition... it might take enough market share to at least force them to cut their prices, which just means that their very, very robust margins might decrease."

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806. Let Freedom: Political News, Un-Biased, Lex Fridman, Joe Rogan, CNN, Fox News

Episode: America's Semiconductor Future: Hurdles and Hope
Date: 2025-07-29 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast covers recent developments in the semiconductor industry and mentions NVIDIA CEO Jensen Huang's response to export control advocacy, highlighting some industry drama and government regulations affecting chip shipments to China. It touches on NVIDIA's AI chip export challenges but doesn't delve deeply into Huang's AI strategy or competitive positioning.

"In fact, to the point where NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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807. Wall Street Breakfast

Episode: OpenAI and Amazon in $38 billion cloud deal
Date: 2025-11-03 | Relevance: 65/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses OpenAI's large cloud deal with Amazon Web Services that involves provisioning hundreds of thousands of NVIDIA GPUs, signaling strong demand for NVIDIA's AI hardware. An analyst notes a likely surge in NVIDIA GPU shipments driven by new product launches, reflecting optimism about NVIDIA's growth prospects.

"Analyst Ananda Baru said he believes that NVIDIA is about to see a surge in GPU shipments over the next 12 to 15 months, aided by its GB200 and VL72 racks."

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808. RiskReversal Pod

Episode: The Case for "Buying Boring" When Tech Gets Expensive
Date: 2025-09-09 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's stock performance and market competition, highlighting customer moves by companies like Microsoft, Amazon, and Alphabet to develop their own chips, which could pressure NVIDIA's profit margins. The conversation reflects concerns about sustainability of NVIDIA's high profitability amid increasing competition in AI chip development.

"So NVIDIA's stock and NVIDIA's prospects going forward with this competition, are they going to be able to sustain a 75 percent profit margin?"

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809. AI Finance

Episode: Nvidia Hits $57B Revenue as Analysts Warn of AI Hype
Date: 2025-11-20 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record-setting quarterly earnings amid AI market hype concerns, highlighting Nvidia's continued market influence and investments in AI companies. The discussion reflects on whether the AI bubble is deflating, with a bullish tone towards Nvidia's performance and CEO Jensen Huang's outlook.

"Nvidia just came out with their quarterly earnings and it shocked a lot of people... Nvidia continues to just shock people and keeps the market rally going forever."

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810. Audio:Desecrating the Arts + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 65/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses President Trump's AI manufacturing initiatives and highlights NVIDIA CEO Jensen Huang's praise of the administration's efforts to strengthen American technology leadership and supply chain resilience. It notes NVIDIA's role in advancing U.S. AI strategy and supply chain security without deep technical detail.

"The President would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest and build in the United States, he said at a May 24th Swedish event. Manufacturing in the United States, securing our supply chain, having real resilience, redundancy, and diversity in our manufacturing supply chain, all of that is excellent."

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811. Digimasters Shorts

Episode: Digimasters Shorts - UAE Builds US-Managed AI Hub with Nvidia Chips, xAI's Grok Sparks White Genocide Controversy, Microsoft Cuts 40 Percent of US Coders Amid AI Shift, Google's AI Overviews Hit Publisher Traffic, Figma Launches New AI Tools to Revolution
Date: 2025-05-19 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses a new AI hub in Abu Dhabi involving annual imports of 500,000 Nvidia chips and mentions Nvidia CEO Jensen Huang's support for the deal, highlighting its strategic significance in AI technology supply chains amid geopolitical considerations.

"Top industry leaders like Nvidia's Jensen Huang and OpenAI's Sam Altman support the deal, anticipating significant market growth."

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812. China EVs & More

Episode: Episode #216 - NEVs Outsell ICE in China, NIO's Onvo L90, Li Auto i8, Tesla Model Y L & Xiaomi's Big Push
Date: 2025-07-21 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Jensen Huang's efforts in navigating NVIDIA's position in the China market, his role in AI and chip diplomacy amid competition from Chinese EV makers and chip manufacturers, and NVIDIA's strategic positioning against competitors and geopolitical challenges.
"I think he's played the part of diplomacy. Maybe we call it the AI diplomacy or chip diplomacy more so than Elon Musk because we thought Elon Musk would be kind of the guy in the middle, right? Now Jensen has become the guy in the middle."

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813. Tech Industry Daily: Breaking News & Analysis

Episode: Tesla's Trillion-Dollar Trillionaire? Nvidia's China Chill Shakes Tech
Date: 2025-11-07 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's recent decision to halt shipments of AI chips to China in response to US export restrictions, with CEO Jensen Huang confirming no plans for further exports. This move is expected to impact market dynamics and the semiconductor supply chain.
"Meanwhile, Nvidia has drawn industry attention by announcing it will halt shipments of all artificial intelligence chits to China, aligning with new United States export restrictions. CEO Jensen Huang confirmed that the company, central to the AI hardware race, has no plans for further China exports."

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814. The FinanceNow Podcast

Episode: If In Doubt, Maintain Forecasts
Date: 2025-04-21 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses TSMC's financial performance and cautiously optimistic outlook, highlighting its role as a key manufacturer for NVIDIA and the impact of trade restrictions on NVIDIA's supply to China. It mentions Jensen Huang's efforts in engaging with Chinese officials amid these challenges.
"I think Jensen Huang visiting Beijing, you know, talking to the politicians in China. And I think, you know, Jensen Huang, if I'm not wrong, did say that..."

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815. Daily Tech Headlines

Episode: Nvidia Has Invested $5 Billion In Intel, Becoming A Major Shareholder - DTH
Date: 2025-09-18 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $5 billion investment in Intel, making it a major shareholder and partner in developing PC and data center chips. It highlights the strategic collaboration involving NVIDIA's high-speed communication technology and the potential political benefits that may ease chip sale restrictions to China.
"Nvidia has invested $5 billion in Intel, becoming a major shareholder and partnering to develop PC and data center chips."

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816. Investing in Intelligence: AI Stocks and Options

Episode: How AMD Earnings, Clawdbot ft. Claude Legal, and Other Burryesque AI Narratives Can Make You Money
Date: 2026-02-05 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a recent episode involving Michael Burry accusing NVIDIA of financial misstatements, which the speaker refutes, arguing technological advances and operational tactics justify the company's reported figures. There is also mention of market reactions to these accusations and commentary on short sellers targeting NVIDIA.
"The business models of these companies are just far too good for them to get to the point of having exhausted every other operational tactic that then they have to cook the books."

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817. Practical: AI & Business News

Episode: Meta Just Bought a Chip Startup to Take on Nvidia
Date: 2025-10-04 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Meta's acquisition of chip startup Revos as a move to reduce dependence on Nvidia for AI infrastructure; Meta is currently a major Nvidia customer, but this shift could change the competitive landscape. The discussion highlights Nvidia's significant role in providing GPUs to Meta but focuses more on Meta's strategic shift rather than detailed NVIDIA strategy or supply chain.
"Reports say Meta is one of Nvidia's biggest customers, sometimes outspending even Microsoft and Google in their GPU orders."

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818. Las Mananeras

Episode: Aranceles a exportaciones?
Date: 2025-08-11 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses US export controls affecting NVIDIA, including the imposition of 15% tariffs on certain microchip exports to China and the implications of these trade policies on NVIDIA's revenue and operations in China.

"Now, the new move by the Trump administration is to license NVIDIA and AMD to sell their microchips to China, but they will have to pay 15% of all revenue from those sales as a new tax or tariff to obtain that export license."

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819. Las Mananeras

Episode: Intel decepciona al mercado
Date: 2026-01-23 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses challenges NVIDIA faces in selling its H200 microchips in China due to trade tensions and security concerns, noting Jensen Huang's upcoming trip to China to try to close sales. It also mentions the significant market impact of NVIDIA's performance.

"Nvidia, el director general Jensen Huang, esta listo para viajar a China en las siguientes dos semanas para poder estar cerrando todas esas ventas de sus microchips H200."

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820. Chisme Corporativo

Episode: Microsoft estaba hundido... hasta que llego Satya Nadella
Date: 2025-04-22 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA primarily in the context of its continued role as a major supplier for key players and recent strategic announcements by Jensen Huang focusing on robotics and partnerships with companies like General Motors and Disney. There is also commentary on competition from Deep Seek and the broader AI chip market.

"Justo ayer Jensen Huang hizo un anuncio de Como los principales cambios Que va a haber para NVIDIA Se van a enfocar un chingo En robotica Hicieron deals con General Motors Con Disney O sea, con companias Muy grandes Para hacer... La fuerza detras De esas grandes companias."

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821. Tech News Briefing

Episode: TNB Tech Minute: Nvidia, AMD to Give U.S. a Cut of AI Chip Sales to China
Date: 2025-08-11 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's agreement with the Trump administration to share 15% of AI chip sales revenue to China amidst export approvals, following a meeting between CEO Jensen Huang and President Trump. It briefly covers related industry political interactions but provides limited details on Nvidia's AI strategy, supply chain, or competition.

"The administration will receive 15% of sales revenue as part of a deal to approve exports of Nvidia's H20AI chip to China."

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822. Tech Update | BNR

Episode: Nvidia laat Trump onderhandelen met Xi Jinping
Date: 2025-10-29 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses the geopolitical and regulatory challenges facing NVIDIA, including US government negotiations involving Donald Trump and concerns about NVIDIA's operations in China. It highlights the tension between American restrictions on NVIDIA's activities in China and the company's need to engage with the Chinese market for AI chip development.

"De Amerikaanse overheid heeft duidelijk gemaakt dat ze niet willen dat Nvidia actief is in China, zei Wang tegen media die daarbij ook aanwezig waren. Volgens hem is die Chinese markt echter nodig om in Amerika nog betere chips te ontwikkelen."

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823. The Hardware Unboxed Podcast

Episode: Nvidia Buries RTX 5060 Reviews
Date: 2025-05-10 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's unconventional launch strategy for the RTX 5060 GPU, focusing on the timing, lack of review drivers, and apparent attempt to minimize attention on the product. They outline how NVIDIA has confirmed the May 19th launch date but is not providing materials for reviews.

""Nvidia changing their mind about the RTX 5060 launch, maybe changing their mind a few times about this one.""

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824. World Business Report

Episode: Nvidia investing $100 billion in OpenAI
Date: 2025-09-23 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's significant $100 billion investment in OpenAI to support next-generation AI infrastructure, highlighting NVIDIA's role as a leader in AI hardware and its collaboration with AI software leader OpenAI. It also touches upon the scale of investment and power needs involved, noting the impact on NVIDIA's share price and industry prominence.
"The world's most valuable company, the US tech firm and chipmaker NVIDIA, has announced it's investing up to $100 billion in another tech giant, OpenAI, the creator of ChatGPT, to build database infrastructure for what it calls the next generation of artificial intelligence."

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825. Tech Update | BNR

Episode: Nvidia sluit opnieuw handelsdeal in het Midden-Oosten
Date: 2025-05-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA securing a significant deal to supply advanced AI chips annually to the United Arab Emirates and potentially to Saudi Arabia, amid ongoing geopolitical and export restrictions. This is contextualized with references to high-profile figures like Donald Trump and Elon Musk touring the Middle East to advance U.S. tech business interests.
"Ja, en dit keer in de Verenigde Arabische Emiraten, Bas. Daar mag Nvidia jaarlijks een half miljoen van de meest geavanceerde AI-chips gaan leveren."

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826. Newsthink

Episode: The Man Behind NVIDIA: The Company Bigger Than Tesla | Newsthink
Date: 2025-06-07 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's significant growth and market value, highlighting Jensen Huang's background and the company's evolution from a gaming GPU maker to a leading AI system provider. It notes NVIDIA's comparison with other tech giants and its foundational role in powering AI systems beyond gaming.
"NVIDIA is a chip-maker that has gone from powering gaming to powering AI systems. It's the brainchild of Jensen Huang."

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827. Fernando Ulrich

Episode: Nvidia, OpenAI e a pergunta que nao quer calar
Date: 2025-11-21 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent strong quarterly results amidst the AI boom, including CEO Jensen Huang's positive view that the AI ecosystem is scaling without a bubble, juxtaposed with other investors' concerns. It contextualizes Nvidia's performance and valuation in the broader tech investment cycle and market volatility.
"Para o CEO da Nvidia, o Jansen Huang, eles nao veem uma bolha, acham que o ecossistema entrou num circulo virtuoso e que esta escalando rapidamente."

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828. Robotics Industry Insider: AI & Automation News

Episode: Robots Take Over Factory Floors: Humanoids Clock In and Jensen Huang Drops the Mic at CES
Date: 2026-01-31 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA CEO Jensen Huang's announcement at CES about the arrival of the 'chat GPT moment' for robotics, highlighting NVIDIA's role in enabling advanced AI capabilities that allow robots to perceive, reason, and act in real-world environments. The episode places this within the broader context of growth in industrial automation and AI-driven robotics in manufacturing.
"As NVIDIA's Jensen Huang declared at CES, the chat GPT moment for robotics has arrived, enabling robots to perceive, reason, and act in real-world settings."

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829. Slate News

Episode: What Next TBD | Trump Dips into NVIDIA's Chips
Date: 2025-08-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's central role in the AI chip market, highlighting CEO Jensen Huang's strategic navigation of geopolitical tensions between the U.S. and China involving chip exports. It outlines how NVIDIA's GPUs moved from niche gaming products to vital AI components and touches on Huang's influence and diplomatic efforts during trade restrictions.
"People in China have nicknamed him Magic Taylor because he has sort of threaded the needle between export restrictions in the U.S. and everything going on in China. He's sort of found a way to keep everyone happy."

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830. Sur le fil

Episode: Nvidia, ce geant mondial de la tech si discret (REDIFFUSION)
Date: 2025-08-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's historic market valuation milestone and its rise as a global leader in GPU manufacturing, highlighting its critical role in AI computation power. It presents a portrait of Nvidia's growth, its foundational story involving Jensen Huang, and its geopolitical significance.

"Le 9 juillet, le fabricant americain de cartes graphiques Nvidia a battu un record historique en franchissant le seuil des 4000 milliards de dollars de valorisation boursiere."

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831. Infamous AI

Episode: AI Boom Pushes Nvidia to Historic High
Date: 2025-11-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's record quarterly earnings and its ongoing influence in the AI sector, highlighting investments in AI companies and market reactions. Jensen Huang is described as bullish amidst AI bubble concerns, contributing to Nvidia's sustained market rally.

"The founder and CEO, Jensen Wang, he seems very bullish. People are talking in these, you know, like, oh my gosh, the AI bubble is about to pop and the stock market is going to crash."

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832. AI in Business

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI computing capacity, highlighting the significance of the deal and CoreWeave's position in the AI infrastructure space. It provides a general overview but lacks detailed insights on NVIDIA's AI strategy, supply chain, or competition.

"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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833. Machine Learning Street Talk

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic partnership and infrastructure growth. The focus is on the investment impact rather than details of Jensen Huang's statements or NVIDIA's AI strategy, supply chain, or competition.

""NVIDIA has just made a $2 billion investment deal with CoreWeave to add 5 gigawatts of AI compute, which is an absolutely massive deal.""

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834. Hugging Face

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity by 5 gigawatts, highlighting the strategic importance of this deal and CoreWeave's situation. The episode centers on this investment and its implications for NVIDIA's AI infrastructure growth.

"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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835. Reshaping Workflows with Dell Pro Precision and NVIDIA RTX PRO GPUs

Episode: Inside the Dell AI Factory 2.0 with Jeremy Williford
Date: 2025-08-14 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode features Jeremy Williford, an NVIDIA veteran, discussing the Dell AI Factory 2.0 collaboration with NVIDIA, reflecting on NVIDIA's development and growth over nearly three decades.

"My name is Jeremy. I started NVIDIA back in 1998. And so whenever I started, we had probably about 60, 62 people total at the company... we were really on the cusp of going out of business... We signed two large deals. Next thing you know, we took off."

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836. Market Research Webinars

Episode: NVIDIA's Failed ARM Bid_ Strategy and Semiconductor Shift.
Date: 2025-04-01 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's attempted acquisition of ARM Holdings and provides context about ARM's role in the semiconductor industry and NVIDIA's position focusing on GPUs and AI applications. It touches on why NVIDIA might have wanted to acquire ARM but does not delve deeply into NVIDIA's AI strategy, supply chain, or competition.

""So NVIDIA, yeah, for a lot of people, it's graphics cards. Right? It is graphics processing units. GPUs. The things gamers love. But also, increasingly, you know, they're very important in artificial intelligence.""

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837. Chain Reaction

Episode: Supply Chain Pulse
Date: 2025-09-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent $5 billion investment in Intel, highlighting this historic partnership and its potential to strengthen NVIDIA's position in AI and the chip market. It also touches on the integration of NVIDIA's NVLink technology and the collaboration's expected benefits for cloud computing and personal computers.

""It's a historic partnership between these two giant chipmakers.""

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838. The US-China Podcast

Episode: DeepSeek and U.S.-China AI Competition
Date: 2025-02-14 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses U.S.-China competition in AI and references NVIDIA in the context of rumors about DeepSeek having access to over 50K NVIDIA H100 GPUs, highlighting the tech community's welcoming stance on open source versus policymakers' concerns.

"Specifically, you know, there's some rumor or allegation that DeepSeek actually had access to more than 50K NVIDIA H100 GPUs. What do you make of it?"

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839. AI Insights: AI News, Eyewitness Accounts

Episode: The Fight to Revive U.S. Semiconductor Production
Date: 2025-07-29 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses the semiconductor industry's recent developments, focusing on export restrictions and includes a mention of NVIDIA CEO Jensen Huang responding to industry export debates, highlighting his stance on innovation over export restrictions. It touches on NVIDIA in the context of export controls and competition without deep detail on AI strategy or supply chain.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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840. In Machines We Trust AI

Episode: The U.S. Chip Gamble: Winners and Losers
Date: 2025-09-16 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses U.S. semiconductor export control policies affecting NVIDIA, including Jensen Huang's response to restrictions and industry dynamics between American and Chinese competitors.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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841. Uncanny Valley of AI

Episode: Nvidia Pushes Tech Market Into Overdrive
Date: 2025-11-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record-breaking quarterly earnings and its influence on dispelling AI bubble concerns. It highlights Nvidia's strategy of investing in major AI companies, contributing to continued market rally optimism.

"Nvidia continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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842. LLM

Episode: Nvidia Dominates AI Spending Again
Date: 2025-11-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's strong quarterly earnings amidst AI market skepticism, highlighting Nvidia's investments in many major AI companies and the bullish stance of CEO Jensen Huang on the AI sector. However, the discussion questions whether this

performance fully cancels out concerns about an AI bubble.

"The founder and CEO, Jensen Wang, he seems very bullish. People are talking in these, you know, like, oh my gosh, the AI bubble is about to pop and the stock market is going to crash."

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843. In Machines We Trust AI

Episode: Nvidia's $57B Revenue Sparks Investor Frenzy

Date: 2025-11-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA's record quarterly earnings and its ongoing positive impact on the AI market, highlighting Jensen Huang's bullish outlook and NVIDIA's role in funding AI companies. It also touches on the market skepticism about the AI bubble and NVIDIA's continued growth and influence.

"The founder and CEO, Jensen Wang, he seems very bullish."

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844. Bloomberg Tech

Episode: Nvidia Wins US Approval to Sell H200 Chips to China

Date: 2025-12-09 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses the U.S. government's approval for NVIDIA to ship its H200 AI chips to China with a 25% surcharge and the subsequent market reaction impacted by potential Chinese restrictions. The discussion reflects on NVIDIA's stock behavior amid these geopolitical and regulatory developments affecting the AI chip supply chain.

"NVIDIA would be authorized to ship H200 to China under certain circumstances with a 25% surcharge, the stock spiked. But then when reports hit that China would move with its own restrictions on how and why and which companies could have access to that technology, the gains fizzled."

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845. Monde Numerique (Actu Tech)

Episode: L'HEBDO 24/01 - Davos 2026 : comment l'IA redessine le monde

Date: 2026-01-24 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Jensen Huang's perspective on AI as a transformative infrastructure comparable to electricity or telecom, highlighting the significant investment required in data centers, networks, and energy capacity. It underscores AI's shift from promise to reality and its central role in global industrial and geopolitical competition, reflecting NVIDIA's strategic positioning under Huang's leadership.

"Jensen Huang calls AI an infrastructure comparable to electricity or telecom, signifying a new era demanding trillions of dollars in investment for data centers, networks, and necessary energy capacities."

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846. Better Offline

Episode: Part One: NVIDIA Isn't Enron - So What Is It?

Date: 2025-12-17 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses a leaked internal memo from NVIDIA addressing concerns and comparisons to Enron, highlighting the company's efforts to reassure stakeholders. It critiques a Barron's reporter known for bullish coverage of NVIDIA, while also acknowledging worries shared by short sellers.

"'NVIDIA's very secret not to be leaked immediately document spent thousands of words very specifically explaining how NVIDIA was fine, and most importantly, by the way, nothing like Enron.'"

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847. EL CEO

Episode: El origen de Nvidia: un desayuno en Denny's

Date: 2025-07-24 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Nvidia's unconventional founding story by Jensen Huang, highlighting the company's growth from early challenges to becoming a $2.2 trillion technology leader expanding beyond gaming into AI and cloud computing.

"La historia de exito de Nvidia comienza de una manera poco convencional en un restaurante Dennys en California."

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848. Salvador Mingo -Conocimiento Experto-

Episode: 395 -La Maquina que Piensa - Como Jensen Huang y Nvidia Redefinieron el Poder Mundial- Conocimiento Experto

Date: 2025-06-16 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast episode discusses the influential role of Jensen Huang and Nvidia in redefining global power through advances in AI and microchips, portraying Huang as a determined immigrant leader central to Nvidia's success. It provides an overview of Nvidia's impact but does not delve deeply into technical details or specific AI strategies.

""En el centro de ese imperio, no hay un politico ni un visionario espiritual, sino un inmigrante asiatico con mentalidad de acero, obsesion por el detalle y una capacidad sobrehumana para mantenerse firme en medio del caos.""

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849. ThePrint

Episode: CutTheClutter: Behind Nvidia & its CEO Jensen Huang's rise in Trump 2.0, & how he is caught in US-China AI Cold War
Date: 2025-11-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the strategic role of Jensen Huang and NVIDIA in the emerging US-China technological Cold War, highlighting NVIDIA's position as a maker of leading AI and computing chips. The focus is on the geopolitical context and NVIDIA's significance in chip manufacturing rather than detailed specifics of AI strategy or supply chain.

"Jensen Huang, the founder of NVIDIA, caught in the middle of this new cold war over technology computing power? That's because he makes among the world's best, most expensive and most wanted chips."

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850. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: The "AI Super Bowl" Previews the Future
Date: 2025-03-20 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's annual developer conference, GTC, referring to it as the 'AI Super Bowl' in a positive light, highlighting the scale and enthusiasm around the event. It includes mentions of CEO Jensen Huang coining the analogy and notes the large attendance and significant announcements at the event, implying a focus on NVIDIA's AI-related developments.

"That Super Bowl analogy actually came from CEO Jensen Huang."

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851. Becker Private Equity & Business

Episode: Is NVIDIA Undervalued? 12-16-25
Date: 2025-12-16 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses articles analyzing NVIDIA's valuation, highlighting its significant free cash flow, high yet reasonable P/E ratios, and strong growth compared to other top tech companies. The host finds the premise that NVIDIA might be undervalued to be compelling.

""Even though NVIDIA is the highest market cap company in the world... it may still be considered undervalued.""

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852. The Amazing AI News

Episode: "Superintelligence Value. Nvidia Acumen. Dependency Chaos. "
Date: 2025-04-13 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast highlights NVIDIA's significant role and strategic leadership in the AI industry under CEO Jensen Huang, emphasizing the company's business acumen and dominance in AI technology. Mention is also made of NVIDIA's investment in AI startups such as Safe Superintelligence, reflecting its active involvement in advancing AI innovation.

"NVIDIA's success mirrors CEO's unparalleled business acumen. NVIDIA, under the strategic leadership of CEO Jensen Huang, has emerged as a formidable force in the tech landscape, particularly within the realm of artificial intelligence."

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853. Tech Update | BNR

Episode: 'Nvidia-investering van 100 miljard dollar in OpenAI op losse schroeven'
Date: 2026-02-02 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses Nvidia's announced but possibly unconfirmed $100 billion investment in OpenAI, with skepticism about the deal's status and comments about OpenAI's business discipline, referencing statements attributed to Nvidia executive Jensen Huang (called Jensen Wang here) and his subsequent denial of rumors.

"Nvidia-basis Jensen Wang zou intern al een aantal keer benadrukt hebben... dat de deal nog niet rond was, gewoon tegen collega's. En hij zou ook gezegd hebben dat OpenAI... geen discipline op zakelijk gebied heeft."

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854. theCUBE Podcast

Episode: 119: AI Retail Week, More NVIDIA Dominance, AI on the Edge
Date: 2026-01-16 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast highlights NVIDIA's significant role as the AI operating system driving transformation in the retail sector, emphasizing how early adoption of AI agents is giving companies a competitive edge. It reflects on NVIDIA's influence in AI-native retail transformations and the growing impact of AI in various verticals including retail and healthcare.

"But retail, again, the AI operating system of retail is NVIDIA. It's these AI factories. You're starting to see the beginnings of an operating system in these application-rich environments."

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855. GitHub Daily Trend

Episode: GitHub - NVIDIA/cutile-python: cuTile is a programming model for writing parallel kernels for NVI...
Date: 2025-12-10 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's cuTile Python programming model for GPUs, focusing on its niche design, setup complexity, dependencies, and potential barriers for broader usability. The conversation weighs the trade-offs between powerful features and user-friendliness, speculating on NVIDIA's strategy balancing open source collaboration and proprietary interests.
""It makes you wonder about their long-term strategy. For sure. Are they trying to build a community or is it more about showcasing their technology?""

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856. The Financial Exchange Show

Episode: Did Jensen Huang just pop the AI bubble?
Date: 2025-11-06 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Jensen Huang's comments on the AI race, particularly his statement that China might win despite not using NVIDIA chips, which raises questions about the company's competitive positioning. The conversation reflects skepticism about NVIDIA's long-term dominance and the value of their technology if the AI race is won without it.
"Jensen Huang does an interview with the Financial Times. And he says China's going to win the AI race. He then issued a correction, you know, shortly after, like, being like, oh, well, what I meant is, you know, we're running really fast, but we've got to keep it up."

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857. Bloomberg News Now

Episode: Trump Global Tariff Ruling, Nvidia Upbeat Forecast, More
Date: 2025-05-29 | Relevance: 65/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast reports on Nvidia's strong revenue forecast despite export control challenges in China, featuring a brief direct quote from CEO Jensen Huang on the constraints of export limitations. Shares rose over 4% following the positive forecast.
"The limitations are quite stringent, quite limited, if you will. H20 is as far down as we could take a hopper. We don't know how to make it even less, and so that's really the limit. But the limitations are quite stringent, so we have to really think through it. Whatever we make ultimately has to add value to the market."

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858. Monde Numerique (Actu Tech)

Episode: Davos 2026 : l'IA au cur du pouvoir mondial (Zoom Tech)
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's perspective on AI as a new industrial infrastructure akin to electricity or telecommunications, requiring massive investment in data centers and networks globally. It highlights NVIDIA's central role in the growing AI ecosystem amid global competition and technological advancement.
"Jensen Huang. L'IA est une infrastructure et il n'y a pas"

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859. Today, Explained AI

Episode: AI & Chips Policy Shift Under AI Regulation and Chip Strategy
Date: 2025-06-02 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent U.S. government policy changes regarding AI chip export limits, highlighting NVIDIA's concerns that strict export controls could harm its business and potentially lead to increased chip development in China. The focus is on the impact of these regulatory decisions on the AI chip market and geopolitical considerations.
"NVIDIA, I think in particular was like, it's going to be bad for our company, obviously. But also they're like, if you do that, then China is just going to develop their own chips, and they're going to ship it to countries."

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860. The Information's TITV

Episode: AMD-OpenAI Partnership, Crescendo's AI Rollup Strategy, Founders Fund's Big AI Bet | Oct 6, 2025
Date: 2025-10-06 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $100 billion letter of intent with OpenAI as a strategic move to secure OpenAI's compute needs and investments, contrasting it with AMD's approach to remain competitive in AI hardware. It highlights the dynamics between NVIDIA and AMD in the AI chip market, especially in relation to OpenAI's compute partnerships.
""NVIDIA came to the table and said, hey, Sam wants more compute, and we have a lot of free cash flow. So we have the cash to help invest and pull forward his compute needs and help him get the compute he needs.""

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861. AI HR

Episode: Amazon's Homegrown Chips Deliver Massive Revenue Wins
Date: 2025-12-06 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in the AI chip market and highlights emerging competition from Amazon's AWS homegrown chips, noting AWS's competitive advantage due to its large cloud infrastructure. It suggests there may be cracks in NVIDIA's monopoly but acknowledges their strong market position.
""Andy Jassy, who is the CEO of Amazon, said that their competitive chip to NVIDIA is already a multi-billion dollar business and it seems like this is something that is going to continue to grow.""

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862. WHAT THE TRUCK?!?

Episode: Will Tariffs Steal Christmas? AV Safety, Simulation, and Supply Chain Showdowns
Date: 2025-08-06 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the challenges of training autonomous vehicle systems, highlighting NVIDIA's simulation platform, Gatic Arena integrated with NVIDIA Cosmos, as a crucial tool for developing safe self-driving technology through synthetic data and virtual testing environments.
"It's called Gatic Arena, and it's also integrated with NVIDIA Cosmos, which is a world foundational model."

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863. CNBC's "Fast Money"

Episode: Trump Floats China Tariff Cut... And Cargo Theft Threatens The Supply Chain 5/9/25
Date: 2025-05-09 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's plan to release a less sophisticated AI chip, the H20, to comply with export restrictions and maintain presence in the Chinese market, alongside stock performance and competition news.
"NVIDIA reportedly planning to release a less sophisticated version of its H20 AI chip that meets requirements to ship to China."

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864. Money and Me

Episode: Money and Me: The ACE Strategy - Gold, Tech and Emerging Markets
Date: 2025-10-10 | Relevance: 65/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the AI investment ecosystem involving NVIDIA and other tech players, emphasizing their collaborative investments to accelerate AI development and the ongoing strong spending in data center technology linked with NVIDIA's semiconductor involvement. It highlights optimism about AI's potential to enhance productivity and the continuing central role of AI in investment strategies.
"You can see today between the large players like NVIDIA, like AMD, OpenAI, they are investing into each other's future."

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865. Podcasts Archives - Breast Cancer Action

Episode: NVIDIA RAPIDS and Open Source ML Acceleration with Chris Deotte and Jean-Francois Puget
Date: 2025-03-04 | Relevance: 65/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features NVIDIA senior data scientist Chris Deotte and director Jean-Francois Puget discussing NVIDIA RAPIDS, an open-source GPU-accelerated platform for data science and AI. They share insights on Kaggle competitions and the application of these techniques to improve data science performance with NVIDIA technologies.
"NVIDIA RAPIDS is an open-source suite of GPU-accelerated data science and AI libraries that leverages CUDA and significantly enhances the performance of core Python frameworks."

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866. Market News with Rodney Lake

Episode: Episode 38 | Navigating the US-China Tech Race: Apple, Nvidia, and the Future of AI
Date: 2025-04-03 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's market performance, highlighting its significant role in chip sales amid the US-China tech dynamics and supply chain concerns related to chip production outside Taiwan. It mentions market fluctuations and the challenges of chip manufacturing in the US but does not provide detailed insights from Jensen Huang on AI strategy or competition.
"Certainly NVIDIA is the company that's selling all these chips. Now that we tie in China, you do have concerns about can they produce the most advanced chips outside of Taiwan?"

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867. Markets & Money Today | 2 Min News | The Daily News Now!

Episode: Intel's $5 Billion Nvidia Deal: A Semiconductor Shakeup
Date: 2025-09-18 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses a major $5 billion investment and new partnership where Intel will build custom processing chips for Nvidia's AI systems, potentially shifting Nvidia's chip production from TSMC to Intel. It highlights the semiconductor market impact and

Intel's strategic moves, signaling a significant industry shakeup involving Nvidia.
"Intel will now build custom processing chips that Nvidia plans to use in its artificial intelligence systems."

868. AI News by PocketPod

Episode: AI Search Wars Heat Up as Perplexity Seeks Billions, Cancer Detection Gets AI Boost, Lisa Su Reshapes AMD's Future
Date: 2025-03-21 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA unveiling its next generation of AI chips at a key industry conference, highlighting the company's continuing role in AI hardware development. NVIDIA is also noted as an investor in the AI search startup Perplexity, reflecting its involvement in the AI ecosystem.
"NVIDIA unveils its next generation of AI chips at a pivotal industry conference in Silicon Valley."

869. HOT Hot English News

Episode: :IMF!||21!|?|!AI |20260120
Date: 2026-01-19 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's leadership philosophy, emphasizing his approach of retaining even the lowest 5% performers to encourage innovation and risk-taking within the company. It also highlights his views on the importance of programming skills in the AI era to empower creators rather than just users.
"He used the idea of a thick soup philosophy to describe NVIDIA's culture and stressed that diverse teams can inspire creativity."

870. Beijing Bytes: US-China Tech War Updates

Episode: Silicon Smackdown: China's Telecom Plot, AI Chip Flex, and Cyber Chaos!
Date: 2025-10-05 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA CEO Jensen Huang commenting on China's proximity in AI chip development and reflects on the broader context of US-China tech competition and chip supply chain dynamics. It highlights the geopolitical and supply chain challenges impacting the semiconductor industry relevant to NVIDIA's strategy.
"NVIDIA's Jensen Huang drops the mic by saying China's just nanoseconds behind in AI chips."

871. Silicon Siege: China's Tech Offensive

Episode: Silicon Siege: US-China Hacker Olympics Heat Up! Spy Games, Shady Deals, and Quantum Fears
Date: 2025-08-15 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses cybersecurity concerns related to US-China tensions, with specific mention of NVIDIA's AI chips and supply chain issues, including tracking devices in shipments to prevent smuggling and Jensen Huang's denial of advanced chip smuggling.
"NVIDIA CEO Jensen Huang, for his part, is busy denying any advanced chips are slipping past bans."

872. (Audio)NEWS/VIEWS/NOVELS

Episode: Business Matters:Amazon Fights Against US States' Efforts to Ban Chinese Tech- Report - (May 21) - EpochTV
Date: 2025-05-21 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang, NVIDIA's CEO, commented on the impact of U.S. chip export restrictions on his company and the competitive landscape in China, noting a loss of market share due to restrictive regulations. The discussion includes geopolitical tensions influencing NVIDIA's business in China.
"NVIDIA CEO Jensen Huang praised President Trump's move to do away with some of the Biden administration's chip export curbs. Speaking in Taiwan at the yearly Computex conference, he said the Biden rules cost his and other U.S. companies billions of dollars in sales."

873. The Prof G Pod with Scott Galloway

Episode: China Decode: China's Renewable Energy Dominance in the AI Race
Date: 2025-11-11 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the AI competition between the US and China, highlighting Jensen Huang's remarks on China's position in the AI race and NVIDIA's role due to its cutting-edge semiconductor technology used in data centers essential for AI training. It briefly mentions NVIDIA's technological edge but does not delve deeply into the company's AI strategy, supply chain, or competition in detail.
"I think it's really interesting that Jensen Huang, the CEO of NVIDIA, said this month that he thought that China will win the AI race. Then he slightly backpedaled and said, oh, well, China's only nanoseconds behind."

874. AI in Marketing

Episode: AI's Impact: From Chess to Banking, Beauty, Law, and Global Strategies with Jon Edwards
Date: 2025-11-06 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt includes an outsider's report about NVIDIA's CEO Jensen Huang commenting on China's AI strategy, highlighting Beijing's energy subsidies and flexible regulations as competitive advantages in the global AI race. This provides some insight into NVIDIA's perspective on global competition but lacks detailed discussion about NVIDIA's own AI strategy or supply chain.
"NVIDIA's CEO, Jensen Huang, predicts China's triumph in the global AI race, highlighting Beijing's energy subsidies and flexible regulations as key advantages."

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875. Moyu-nomics

Episode: Exoskeleton Robots Transition from Luxury to Affordability
Date: 2025-07-30 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt briefly discusses NVIDIA CEO Jensen Huang's acknowledgment of ongoing purchases of Intel CPUs, highlighting the continued importance of market competition. It offers a general view on Intel's strategic moves without deep focus on NVIDIA's AI strategy, supply chain, or competition specifics.
"NVIDIA CEO Jensen Huang recently revealed his company still purchases significant amounts of Intel CPUs, underscoring the value of market competition."

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876. Inner World Podcast

Episode: 57. Tai Sao Jensen Huang Cam Dung PowerPoint? - Suc Manh Tu Duy Bang Trang | Inner World Podcast
Date: 2026-01-01 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's unique leadership philosophy at NVIDIA, particularly his rejection of PowerPoint presentations in favor of whiteboard thinking to drive faster and more focused innovation. It highlights how this approach supports NVIDIA's rapid yet directed progress in AI chip development.
""Jensen Huang cam thuyet trinh bang PowerPoint. Ong tin rang slide uoc trang tri ep e, thuong uoc dung e che giau nhung y tuong chua hoan thien hoac la nhung tu duy thieu logic.""

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877. The Joe Rogan Experience

Episode: #2422 - Jensen Huang
Date: 2025-12-03 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features a discussion highlighting NVIDIA as a national treasure with significant importance to national security and American manufacturing, reflecting the company's strategic role and strong government support. The speaker emphasizes the critical nature of onshore manufacturing and the company's alignment with national industrial goals.
""Jensen, this is Secretary Lutnik. And I just want to let you know that you're a national treasure. NVIDIA is a national treasure. And whenever you need access to the president, the administration, you call us, we're always going to be available to you.""

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878. ITSPmagazine

Episode: CES 2026: Why NVIDIA's Jensen Huang Won IEEE Medal of Honor | A Conversation with Mary Ellen Randall, IEEE's 2026 President and CEO | Redefining Society and Technology with Marco Ciappelli
Date: 2026-01-08 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions Jensen Huang receiving the IEEE Medal of Honor for his leadership at NVIDIA and contributions to AI hardware and ecosystem development. The discussion touches on NVIDIA's evolution from gaming to enabling AI advancements across sectors like healthcare.
"He has a beautiful career of innovation and is very influential in AI. And not just the hardware that he's been instrumental in developing, but also the ecosystem that NVIDIA is providing to enable AI advancement."

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879. Digital Voices: AI News, ChatGPT, OpenAI, Gemini, Claude

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute infrastructure, highlighting the significance of the deal and CoreWeave's situation. The conversation touches on NVIDIA's commitment to growing AI infrastructure but lacks direct insights from Jensen Huang or detailed strategy discussion.
""NVIDIA has just made a $2 billion investment deal towards CoreWeave, which is going to help them add 5 gigawatts of AI compute.""

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880. The AI Podcast

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic significance of this deal and the existing close relationship between the companies. The episode mainly offers an overview of the investment and CoreWeave's position in the AI data center space, without direct comments from NVIDIA executives such as Jensen Huang.

""...this is an absolutely massive deal... CoreWeave is a data center operator, and they're trying to very quickly grow a lot of their AI infrastructure.""

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881. The Quantum AI Digest

Episode: The Quantum AI Digest: 5 January 2026 Daily Dispatch
Date: 2026-01-05 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast highlights the upcoming NVIDIA CEO Jensen Huang keynote at CES 2026, indicating an anticipated major announcement regarding the next generation of AI, reaffirming NVIDIA's market leadership in AI hardware.

"At CES 2026, NVIDIA is poised for a major announcement. CEO Jensen Huang will deliver a keynote from Las Vegas, expected to reveal the next generation of AI. Industry insiders consider this a milestone, underscoring NVIDIA's ongoing dominance as AI hardware leader."

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882. World Business Report

Episode: Nvidia hits historic $5 trillion valuation
Date: 2025-10-29 | Relevance: 70/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's unprecedented $5 trillion market valuation, placing it alongside economic giants, and touches on factors like U.S.-China trade talks and AI investments driving this success. The conversation highlights Nvidia's significant role in technology and AI sectors, reflecting optimism about its future prospects.

"Nvidia has just done what no company has ever done before. It has hit a market value of 5 trillion dollars."

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883. ChatGPT: OpenAI, Sam Altman, AI, Joe Rogan, Artificial Intelligence, Practical AI

Episode: How the U.S. Plans to Dominate Semiconductor Tech
Date: 2025-07-29 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the U.S. semiconductor industry with a focus on chip export controls, highlighting a conflict where NVIDIA CEO Jensen Huang called out competitor Anthropic's CEO regarding shipping restrictions to China, reflecting on NVIDIA's stance on innovation versus export limitations.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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884. Founder Built: Interviews, News, Startups, Lex Fridman, Joe Rogan, AI

Episode: The Complex Reality of U.S. Semiconductor Growth
Date: 2025-07-29 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses recent developments in the US semiconductor industry including political restrictions on AI chip exports and mentions a conflict where NVIDIA CEO Jensen Huang criticizes a competitor's stance on shipping chips to China. It highlights industry tensions and strategic positioning but with limited detail on NVIDIA's own AI strategy or supply chain specifics.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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885. Digimasters Shorts

Episode: Philip Nitschke's AI Euthanasia Controversy, Apple's Secret AI Pin Leak, YouTube Battles Deepfake AI, Nvidia's Blue-Collar AI Job Boom
Date: 2026-01-23 | Relevance: 70/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA CEO Jensen Huang discusses the upcoming massive AI data center infrastructure buildout and its impact on creating high-paying blue-collar jobs, highlighting a positive outlook on AI's role in the job market and infrastructure expansion.

"The massive global push to build AI data centres, estimated at $7 trillion by the end of the decade, will fuel what he calls the largest infrastructure build-out in human history."

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886. Headline News

Episode: President Xi meets foreign delegation chiefs attending SCO foreign ministers' meeting
Date: 2025-07-15 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA's resumption of H20 chip sales to China, the unveiling of a new GPU for the Chinese market, and Jensen Huang's recent visits to Washington and Beijing, including his planned attendance at a supply chain expo.
"U.S. semiconductor giant NVIDIA says it will resume sales of its H20 chips to China, and the company has unveiled a new graphics processing unit designed for the Chinese market."

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887. The Exchange

Episode: Nvidia CEO Keynote Address, Tariffs Hit Homebuilders, Foreign Policy in Flux? 3/18/25
Date: 2025-03-18 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's stock performance amid market declines and previews CEO Jensen Huang's upcoming keynote at the company's major event, highlighting expectations for new product updates and the Blackwell architecture.
"CEO Jensen Wong was serving pancakes before at a Denny's truck right behind me because he used to work at Denny's and that's where Nvidia was formed. And he told our audience, as well as myself, a few times off camera that it's going to be big and it's not what everybody is going to expect."

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888. TechLinked

Episode: Mid-range GPU cancellation questions, AI chips for China + more!
Date: 2026-01-17 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses rumors and clarifications about the status of NVIDIA's RTX 5070 Ti and 5060 Ti GPUs, including reported cancellations, denials from Asus and NVIDIA, and anticipated supply challenges due to memory availability issues. It also touches on leaked information about overall GPU supply reductions and the timing of new GeForce model releases.
"NVIDIA followed up with its own statement, saying they continue to ship all GeForce SKUs and are working closely with our suppliers to maximize memory availability."

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889. Tech&Co, la quotidienne

Episode: L'integrale du Debrief de la tech du mercredi 4 fevrier
Date: 2026-02-04 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in the GPU market, contrasting it with competitors AMD and Intel who are struggling to gain investor confidence despite some positive news. It highlights NVIDIA's strong competitive advantage and market leadership in GPUs.
"Aujourd'hui Nvidia pour l'instant a plie le jeu en termes de GPU"

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890. CommSec Market Update

Episode: Morning Report 19 Sep 25: US equities hit record highs after Fed's rate cut
Date: 2025-09-18 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $5 billion investment and collaboration with Intel to develop AI systems for data centers, combining Intel's CPUs with NVIDIA's GPUs and networking technology. It notes the positive market reaction to this collaboration amidst broader semiconductor industry dynamics.
"NVIDIA CEO Jensen Huang said the company's $5 billion investment and technology collaboration with Intel comes after the two companies held discussions earlier this year."

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891. Joe Rogan Experience

Episode: Joe Rogan Experience #2422 - Jensen Huang
Date: 2026-01-03 | Relevance: 75/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang discusses the importance of domestic manufacturing for national security and job growth, praising NVIDIA as a national treasure and highlighting alignment with government priorities on manufacturing and energy growth. There's an emphasis on the practical, common sense approach to maintaining critical technology production in the United States for prosperity and competitiveness.
""I just want to let you know that you're a national treasure. NVIDIA is a national treasure. And whenever you need access to the president, the administration, you call us. We're always going to be available to you.""

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892. GitHub Daily Trend

Episode: GitHub - NVIDIA-Omniverse/PhysX: NVIDIA PhysX SDK
Date: 2025-04-07 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode is focused on explaining NVIDIA's PhysX SDK and its role in real-time physics simulation, highlighting its integration within NVIDIA's Omniverse and the open-source nature of the technology.

""Imagine playing your favorite video game, and every explosion or crash you see isn't just a pre-programmed event, but rather a simulation where the physics are handled in real time. That's where PhysX shines.""

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893. mixx.io

Episode: Intel tiene Nvidia
Date: 2025-09-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Nvidia's surprise investment in 5% of Intel and the planned integration of Nvidia's RTX technology into Intel CPUs, speculating on the implications for future Intel graphics products and the strategic alignment with the US government. It highlights a notable shift in industry dynamics between Intel and Nvidia and touches on potential long-term effects.

"Nvidia has bought suddenly 5% of Intel; they will start designing Intel CPUs with RTX graphics technology integrated instead of the current XE one."

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894. Becker Business Minute Podcast

Episode: Is NVIDIA Undervalued? 12-16-25
Date: 2025-12-16 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses articles analyzing NVIDIA's market valuation, highlighting its substantial free cash flow, high but reasonable P/E ratios, and strong growth rates compared to other major tech companies, suggesting it may still be undervalued despite its large market cap.

"NVIDIA is valued at about $4.5 trillion with $85 billion a year in free cash flow, trading at a price-to-earnings ratio of 45, which is high but not insane for a tech stock, and its growth rates remain incredibly fast compared to other major companies."

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895. Squawk Box Europe Express

Episode: U.S. trade court strikes down Trump tariffs
Date: 2025-05-29 | Relevance: 60/100 | Source: SourceSignal.insider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses Nvidia's Q1 revenue surge and CEO Jensen Huang's criticism of U.S. chip export restrictions impacting Nvidia's market share in China. It highlights the impact of trade policies on Nvidia's business but only offers a brief overview rather than an in-depth analysis.

"Nvidia's market share in China was about 95 percent four years ago. It's about 50 percent today because of the limitations on the products that we sell."

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896. Tech Brew Ride Home

Episode: Tue. 08/12 - Elon To Sue Apple To Get At Sam?
Date: 2025-08-12 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent developments related to NVIDIA's chip sales in China, focusing on Beijing's guidance discouraging the use of NVIDIA's H20 processors for government and national security purposes despite the lifting of U.S. export restrictions.

"Beijing has urged local companies to avoid using NVIDIA's H20 processors, particularly for government-related purposes, complicating the chipmaker's attempts to recoup billions in lost China revenue after the Trump administration reversed an effective U.S. ban on such sales."

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897. Let Freedom: Political News, Un-Biased, Lex Fridman, Joe Rogan, CNN, Fox News

Episode: Trump Admin Alters AI Regulation and Chip Strategy
Date: 2025-06-07 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent changes in U.S. AI chip export regulations, highlighting NVIDIA's opposition to Biden's AI diffusion rules due to concerns over supply chain impacts and competition, especially with China.

"NVIDIA, I think in particular was like, it's going to be bad for our company, obviously. But also they're like, if you do that, then China is just going to develop their own chips and they're going to ship it to countries."

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898. Open AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the significance of the deal and CoreWeave's position as a data center operator. The host reflects on the strategic importance of this investment but does not quote Jensen Huang or discuss NVIDIA's AI strategy or competition in depth.

"$2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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899. Breaking News To Trading Moves

Episode: AMD's CES AI Chip Strategy and Market Impact
Date: 2026-01-06 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses AMD's AI chip strategy and its impact on competitors, including NVIDIA. It highlights the competitive pressure AMD's new chips place on NVIDIA's dominant market share in AI GPUs and the broader AI PC market, but does not include direct commentary from NVIDIA or Jensen Huang.

"Even though NVIDIA is the volume leader, just having a credible competitor like this from AMD can pressure expectations around market share and maybe margins down the road."

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900. Strict Scrutiny

Episode: White House Shakes Up AI Regulation and Chip Strategy
Date: 2025-06-10 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent U.S. government actions on AI chip export regulations, mentioning NVIDIA's concern about export limits potentially harming its business and encouraging China to develop its own chips. It provides context on tiered export restrictions affecting countries including China, Russia, Japan, and others.

"NVIDIA, I think in particular, was like, it's going to be bad for our company, obviously. But also they're like, if you do that, then China is just going to develop their own chips and they're going to ship it to countries."

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901. Halftime Report

Episode: Your September Strategy 8/29/25
Date: 2025-08-29 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent stock performance, highlights long-term growth projections in data center CapEx up to 2030, and acknowledges current market uncertainties impacting NVIDIA and the broader semiconductor sector.

"Long term, they see $3 to $4 trillion in CapEx and data center spend between now and 2030. And they did not change that. That means your CAGR long term is 40% to 45%. That's still very, very healthy growth."

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902. The Asia Chessboard

Episode: Washington's New China Tech Strategy
Date: 2026-01-20 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses U.S. export controls and policy changes related to NVIDIA's AI chips, including the export of NVIDIA's H-200 GPUs and the evolving strategy around chip licensing and AI capabilities amid U.S.-China tech competition. However, it does not contain direct statements from Jensen Huang nor deep analysis of NVIDIA's AI strategy or supply chain specifics.

"allowing the NVIDIA H-200 ships to be exported in April, rolling back a lot of the Biden era export controls, then introducing new ones that trigger the Chinese"

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903. Derisky Business

Episode: Bonus: Washington's New China Tech Strategy
Date: 2026-01-23 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses recent U.S. policies impacting NVIDIA, such as changes to export controls on NVIDIA's H200 chips and broader strategic competition with China in AI chip technology. It highlights the complexity and shifts in U.S. export and industrial policies relevant to NVIDIA's AI strategy and supply chain.

"allowing the NVIDIA H200 chips to be exported in April, rolling back a lot of the Biden era export controls, then introducing new ones that trigger the Chinese."

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904. Investing Experts

Episode: AI spending surge, contrarian take on tech stocks
Date: 2025-11-13 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA in the broader context of AI infrastructure spending and market reactions to valuation concerns, referencing large commitments from entities like OpenAI involving NVIDIA. It emphasizes market sensitivity and contrasts spending commitments with speculative revenue figures for AI companies, including NVIDIA-related deals.
""...open AI committing north of 1.4 trillion over the past couple of months. Some of that is with NVIDIA...""

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905. China EVs & More

Episode: Episode #227 - Xiaomi Surges, Tesla Slows, XPeng Flexes, and GM's Supply Chain Shock
Date: 2025-11-25 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the competitive landscape of automotive AI chips in China, mentioning NVIDIA's role alongside other players like Qualcomm, Horizon Robotics, and Chinese startups, highlighting the complex and competitive nature of AI chip supply for vehicles.
"We also have to remember Qualcomm is already in play. NVIDIA is already in play. So we're talking four different pieces of silicon now."

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906. Chip Stock Investor Podcast

Episode: The "No-Regrets" Robotics Investment Portfolio
Date: 2025-12-15 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in Synopsys, highlighting its strategic move to enhance systems design and simulation capabilities related to robotics, particularly through digital twin technology for factory simulations. The conversation situates NVIDIA within a broader ecosystem involving EDA companies and robotics development but lacks direct commentary from NVIDIA executives or detailed AI strategy insights.
"And this is some of the idea behind why NVIDIA took that $2 billion stake in Synopsys just a couple of weeks ago."

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907. Stock Movers

Episode: Deep Dive: $9 Billion AI Deal
Date: 2025-07-12 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses CoreWeed's acquisition of Core Scientific, highlighting CoreWeed's reliance on Nvidia GPUs for AI infrastructure. It touches on Nvidia's role as a supplier but does not deeply analyze Nvidia's AI strategy, supply chain, or competition.
"They are a very big Nvidia shop. They basically buy GPUs from Nvidia. They create a network or an infrastructure and they give it to people to go out and experiment or do whatever they need to do on that infrastructure."

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908. World Today

Episode: Israel-Iran conflict: Is there still a window for diplomacy?
Date: 2025-06-17 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's participation in a major supply chain expo in China amid increasing U.S. export restrictions, highlighting the company's efforts to maintain market presence despite geopolitical challenges.
"NVIDIA is one of the main corporate victims of the increasing U.S. export controls aimed at curbing China's access to advanced American chips."

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909. That Tech Pod

Episode: The Data Movement Crisis in AI - How Baya Is Rethinking AI Infrastructure with Nandan Nayampally
Date: 2025-05-06 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast guest discusses NVIDIA's transformation from a GPU company to a software solutions company innovating in AI compute through advances like NVLink, emphasizing their role in solving compute, software, and communication challenges in AI. The mention is positive but relatively high-level without in-depth details on strategy, supply chain, or competition.
"Everybody thinks that Nvidia is a GPU company. Nvidia is really a software solutions company that uses their expertise in the GPU to kind of bring over whether it was cryptography, whether it's AI, truly creating the next generation of intelligent compute."

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910. Midjourney

Episode: Cracking the Code on U.S. Semiconductor Policy
Date: 2025-09-16 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses semiconductor export controls and includes a notable mention of NVIDIA CEO Jensen Huang's response to competitor strategies regarding chip exports to China, highlighting some industry tensions and regulatory impacts relevant to NVIDIA's supply chain and competitive positioning.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

911. Daily AI, by AI

Episode: Daily AI Summary - September 20, 2025
Date: 2025-09-20 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly discusses China's ban on NVIDIA AI processors, including a specially designed model compliant with US export restrictions, highlighting significant potential revenue losses for NVIDIA amid escalating chip war tensions. There is no mention of Jensen Huang or NVIDIA's AI strategy or competition in detail.

"China escalated the chip war by banning domestic tech companies from purchasing any NVIDIA AI processors, including the specially designed RTX Pro 6000D that was created specifically to comply with US export restrictions. This represents a complete reversal from buyer to ban, potentially costing NVIDIA billions in lost revenue."

912. The Quantum AI Digest

Episode: The Quantum AI Digest: 17 January 2026 Daily Dispatch
Date: 2026-01-17 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA in the context of semiconductor manufacturing and supply chain dynamics, noting that NVIDIA is competing with Apple for TSMC's capacity and is reportedly the foundry's largest customer. It also mentions U.S. tariffs affecting NVIDIA's advanced chips shipped abroad, with some approvals for sales to vetted Chinese firms.

"Apple and Nvidia are now competing for TSMC's capacity, with recent reports suggesting Nvidia has overtaken Apple as the foundry's largest customer."

913. Beijing Bytes: US-China Tech War Updates

Episode: Silicon Smackdown: China's Telecom Plot, AI Chip Flex, and Cyber Chaos!
Date: 2025-10-05 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast covers the US-China chip and AI competition, mentioning NVIDIA's Jensen Huang who states that China is nanoseconds behind in AI chips, highlighting the tech cold war dynamics affecting the industry. The discussion situates NVIDIA within the broader geostrategic and supply chain tensions without deep detail on NVIDIA's specific AI strategy or supply chain.

"NVIDIA's Jensen Huang drops the mic by saying China's just nanoseconds behind in AI chips"

914. Robotics Industry Insider: AI & Automation News

Episode: Robots Are Eating the Factory Floor and Your Boss Is About to Lease One Instead of Buying It
Date: 2026-02-04 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's role in supporting AI-driven robotics through partnerships like ROS2 for Python-based AI on robust hardware, and highlights Jensen Huang's claims about NVIDIA's significant moment at CES related to physical AI. It touches on NVIDIA's involvement in the industrial automation market and the rise of robots as a service amid supply chain shifts.

"NVIDIA's Jensen Huang declaring its ChatGPT moment at CES, alongside Hundu's Atlas Human and Ecosystems."

915. International News

Episode: Saturday, May 24, 2025 (World)
Date: 2025-05-24 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's upcoming earnings report and economic impact, highlighting expected revenue growth driven by AI chip demand and trade tensions with China affecting the company. However, the mention is brief and lacks details on Jensen Huang's AI strategy, supply chain, or competition.

"Analysts expect NVIDIA's first-quarter earnings to jump by around 45%, with revenue projected at $43.2 billion fueled by strong demand for AI chips."

916. Closing Bell

Episode: Closing Bell Overtime: Goldman's AI Software Playbook; Top Picks in Precious Metals and Small Caps 10/8/25
Date: 2025-10-08 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's comments on rising demand for AI computing, which has driven tech stocks higher, including NVIDIA and competitors like Marvell, Broadcom, and AMD. The overall tone highlights the bullish sentiment around NVIDIA's role in AI infrastructure growth.

"NVIDIA CEO Jensen Wong was interviewed on CNBC this morning stating that demand for computing has, quote, gone up substantially with demand for AI growing exponentially."

917. Fox News Hourly Update

Episode: 12PM ET 04/14/2025 Newscast
Date: 2025-04-14 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast excerpt discusses NVIDIA's manufacturing expansion in the U.S., including the production of Blackwell chips in Arizona and AI supercomputers in Texas with partners, highlighting CEO Jensen Huang's remarks on strengthening supply chain and meeting AI demand. This provides insight into NVIDIA's strategic moves related to AI infrastructure and supply chain resilience.
"CEO Jensen Huang says adding American manufacturing helps NVIDIA to better meet the incredible and growing demand for AI chips and supercomputers, strengthens our supply chain, and boosts our resiliency."

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918. GoodNightCoffee

Episode: ():Colossus 2,,SKHBF
Date: 2026-01-18 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses upcoming memory technologies like High Bandwidth Flash (HBF) that may be used in NVIDIA products around 2027-2028, indicating potential improvements in GPU memory capacity relevant for AI workloads.
"Samsung Electronics and its partners plan to apply this technology in actual products from NVIDIA, AMD and Google as soon as late 2027 or early 2028."

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919. The Morning Dose

Episode: Morning Dose: Moody's Downgrades U.S. Credit Market Gap Alert! - Monday 5/19/2025
Date: 2025-05-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's CEO Jensen Huang delivering a keynote at Computex and mentions a collaboration between Foxconn, Taiwan, and NVIDIA to build an AI factory. Huang also comments on the lack of evidence of AI chip diversion to China, highlighting NVIDIA's AI dominance and strategy.
"Huang also commented that he doesn't see evidence of AI chip diversion to China."

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920. Nofinancieros

Episode: MeriendIA de Negros
Date: 2025-10-10 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's role in AI infrastructure compared to OpenAI's software focus, highlighting the growing interconnected investments and collaborations in the AI industry, acknowledging NVIDIA's critical position in chips and cloud technologies.
"OpenAI pues es el software, es la IA, pues el programa, lo no palpable y NVIDIA pues es la infraestructura, no? Todo la parte de chips, cloud, etcetera, no? Pero claro, lo primero que podemos colegir de esto es que esto esta creciendo o creciendo, bueno, creciendo o demandando o va a demandar tal cantidad de energia, datos, procesamiento, chips, tarjetas graficas, vamos, o sea, de todo."

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921. Byted Size News

Episode: Why Is Google Allowed to "Hook" Kids in Schools for Lifelong Brand Loyalty?
Date: 2026-01-24 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's launch of ARM-based Windows laptops with superchip technology capable of delivering petaflop-level AI performance, highlighting its potential to disrupt the PC landscape and signal a future shift in on-device AI and Windows computing.
"NVIDIA is disrupting the PC duopoly, launching ARM-based Windows laptops with superchip tech that could deliver a petaflop of AI performance."

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922. : , ,

Episode: (iXBT Games) , Nvidia.
Date: 2025-11-10 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's rising market capitalization heavily driven by AI demand, refers to the importance of AI in the IT industry, and notes how major companies like Microsoft are integrating AI. While Nvidia is highlighted as a leader in AI with a rapidly growing valuation, details about Jensen Huang's specific statements or Nvidia's AI strategy, supply chain, or competition are not provided.
" Nvidia ? 5 ? 6? 10? , Nvidia - ."

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923. Broken Silicon

Episode: 310. RTX 5060 8GB War on Reviewers, Nvidia APU Delay Leak, AMD Zen 7, Intel B770 MIA
Date: 2025-05-20 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses controversies around the NVIDIA RTX 5060 launch, including restricted driver access for reviewers, perceived favoritism toward certain media, and pressure on reviewers regarding benchmark comparisons. These issues reflect negatively on NVIDIA's product launch and communication strategy.

"NVIDIA has slithered into their DMs to offer samples under specific guidelines. So, yep, another Blackwell launch disaster hits with the 5060 launch."

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924. Top of Mind with Consilio Wealth

Episode: Episode 75 | Nvidia invests $5B in Intel, OpenAI makes $300B commitment to Oracle, TikTok buyers
Date: 2025-09-24 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic partnership with Intel, government involvement in the chip industry, and challenges NVIDIA faces due to export restrictions to China amid the AI race. It highlights concerns about NVIDIA seeking government favor to maintain access to foreign markets.

"It just screams that, hey, NVIDIA is looking to curry favor with the U.S. government to allow them more free reign into other markets that the government has essentially clamped down with tariffs, with these trade deals, with these restrictions, especially for chips, right?"

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925. Words of the future

Episode: Episode 64: Google IO and Claude 4
Date: 2025-05-25 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's strategy around GPU segmentation, particularly how NVIDIA tries to separate gaming consumer GPUs from AI server cards by limiting VRAM in consumer cards, amidst competition from Intel GPUs offering more VRAM at lower prices. It touches on the challenges in NVIDIA's approach to accommodate new gaming demands and AI workloads.

"Ich glaube Nvidia ist keine Ahnung was Nvidia Strategie ist die versuchen ja krampfhaft irgendwie das Gaming Consumer Segment von den KI Server Karten zu trennen indem sie VRAM extrem limitieren bei den Consumer Karten aber das wird dir auch bei ein Problem weil Monitore hohere Auflosung neure Games irgendwann kommst du mit so Nvidia Karten nicht weiter."

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926. kurz informiert by heise online

Episode: Kurz informiert 16.07.2025 - fruh
Date: 2025-07-16 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions that Nvidia and AMD can resume exporting AI chips to China following new U.S. export licenses, with Nvidia's CEO Jensen Huang lobbying for these permissions. The lifting of restrictions is projected to protect Nvidia from a significant revenue loss, leading to a positive market reaction.

"Nvidia-Chef Jensen Huang hatte bei beiden Regierungen lobbyiert. Ohne China hatte Nvidia einen Umsatzausfall von 15 Milliarden Dollar verkraften mussen."

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927. Decouvrir & Investir par eToro

Episode: NVIDIA, est-ce le moment de shorter ?
Date: 2025-03-09 | Relevance: 65/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: This podcast episode analyzes Nvidia's stock performance from a trading and technical analysis perspective, highlighting its significant price increase from 2023 onwards and a historical stock split. It does not delve into Nvidia's AI strategy, supply chain, or competitive positioning.

"L'action a fait x15 en l'espace de 2 ans, 2 ans et demi."

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928. Stock Movers

Episode: Nvidia Drops on SoftBank Sale, RealReal Boosts Revenue Guidance, CoreWeave Tumbles
Date: 2025-11-11 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's stock movements influenced by SoftBank selling its $5.8 billion stake to invest more in OpenAI, raising concerns about an AI bubble and implications for NVIDIA's future. The conversation touches on market reactions and potential shifts in investment focus but lacks direct commentary from NVIDIA executives.

"SoftBank said that it will be selling its entire $5.8 billion stake in the company as it looks to really go all in on the chat GPT maker OpenAI."

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929. Global News Podcast

Episode: Can Nvidia Outsmart the Export Control Game?
Date: 2025-09-05 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses an incident involving the smuggling of AI chips, reportedly Nvidia chips, to China, touching on Nvidia's response and governmental involvement amid the broader US-China AI race.
"People are asking Nvidia to put kill switches and backdoors in their chips. Nvidia has responded, the White House is weighing in."

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930. Sharp China with Bill Bishop

Episode: TikTok in the Clear; Taiwan Questions and Soybean Angst; The K Visa Goes Live; Jensen Huang on China Hawks
Date: 2025-10-01 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast excerpt discusses Jensen Huang's comments on China hawks and his confrontational approach towards US Congress regarding export controls and policies affecting NVIDIA. It highlights internal company efforts to label opponents of export controls as unpatriotic and notes Jensen's outspoken behavior in political contexts, reflecting tensions between NVIDIA, government policies, and public perception.
"I was told Jensen is literally like yelling at congressmen in their offices."

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931. Listen to the Story

Episode: Nvidia's Jensen Huang Likes Talking About Chips, But Not AI
Date: 2025-04-05 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast excerpt discusses Jensen Huang's approach to discussing AI and chips, highlighting his unexpected reception to praise from Mark Zuckerberg about Nvidia's contributions to the AI boom. It underscores Nvidia's role in the AI surge through its GPUs and Huang's vision long before AI buzzwords like LLM became popular.
""After decades in the trenches, Huang has suddenly become one of the most celebrated executives in Silicon Valley. The current AI boom has been built entirely on the graphics processing units that his company makes, leaving NVIDIA to reap the payoff from a long-shot bet Huang made far before the phrase large-language model, LLM, meant anything to anyone.""

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932. The Explanation

Episode: The Media Show: Meet The Tech Bros
Date: 2025-12-25 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's background, his leadership at NVIDIA, and his pivotal role in the AI revolution as the company's chips are central to the industry. It provides a narrative of his early life, education, and career path, emphasizing his technical expertise and influence.
""Jensen Huang's company, NVIDIA, builds the chips that are the engine room of the entire industry.""

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933. Cyber Wire AI

Episode: Nvidia's $57B Revenue Signals Peak AI Acceleration
Date: 2025-11-20 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's record-breaking quarterly earnings, the impact on AI market sentiment, and NVIDIA's active investment in AI companies fueling its growth. It reflects on whether the AI bubble is deflating, with some bullish commentary on NVIDIA's performance.
"NVIDIA continues to just shock people and keeps the market rally going forever, partly because they keep giving money to AI companies who turn around and give it back to them."

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934. Artificial Intelligence: AI News, ChatGPT, OpenAI, LLM, Anthropic, Claude, Google AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute infrastructure, highlighting the scale of the deal and CoreWeave's role as a data center operator. The host provides context on the investment's significance and NVIDIA's strategic move to grow AI infrastructure.
""$2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute. This is an absolutely massive deal.""

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935. Perplexity AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic importance of this deal in scaling AI infrastructure. The conversation focuses on the partnership and growth prospects rather than detailed strategy or competition.

"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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936. Up First AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the significance of the deal and the close existing relationship between NVIDIA and CoreWeave. The episode mainly covers the investment and CoreWeave's situation rather than direct commentary from NVIDIA executives like Jensen Huang.

"What was really impressive to me is NVIDIA, of course, just like the price tag on this is $2 billion for CoreWeave."

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937. AI Education

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the scale and significance of the deal. The host provides some context about CoreWeave's situation but does not include direct insights from Jensen Huang or detailed strategy discussions about NVIDIA's AI approach or supply chain.

"This is an absolutely massive deal, and this is also kind of an interesting story considering the situation that CoreWeave has found themselves in and how they got here."

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938. Let Freedom: Political News, Un-Biased, Lex Fridman, Joe Rogan, CNN, Fox News

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity by adding 5 gigawatts, highlighting the strategic significance of this deal and the relationship between the companies.

"NVIDIA has just made a $2 billion investment deal with CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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939. Uncanny Valley of AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic partnership and CoreWeave's growth in AI infrastructure. The conversation includes context about CoreWeave's situation and the significance of the deal, but lacks direct insights from NVIDIA executives on AI strategy, supply chain, or competition.

"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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940. AI & HR Daily

Episode: AI for Leaders: Edge AI, Learning & Development and Strategy
Date: 2025-12-27 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's strategic move to enhance its AI hardware capabilities by partnering with the startup Grok and recruiting its founder and engineers, highlighting competitive pressures and the importance of technical talent acquisition. The mention also touches on broader industry challenges around reliable AI deployment and strategic planning in AI investments.

"NVIDIA has teamed up with AI hardware startup Grok, hiring its founder and engineers to enhance its capabilities."

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941. At Barron's

Episode: Qualcomm CEO Shares the Company's Disruption Strategy
Date: 2025-07-17 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The Qualcomm CEO discusses the company's partnership with NVIDIA and acknowledges NVIDIA's leadership and innovation in AI, particularly in training infrastructure and AI models. He highlights their collaboration in the data center space,

emphasizing Qualcomm's CPU capabilities and the integration with NVIDIA's NVLink ecosystem.

"You hear a lot about NVIDIA these days... I think we always believe that semiconductor is very important. I think we... feel that a lot of the things that NVIDIA is doing, creating with their training, infrastructure, creating a lot of those AI models, are going to be deployed everywhere and it's going to be a great opportunity for us."

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942. @HPCpodcast with Shahin Khan and Doug Black

Episode: HPC News Bytes - 20250630

Date: 2025-06-30 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses NVIDIA as a leading GPU giant in the context of the AI chip market and competition with hyperscalers developing their own AI ASICs. It frames NVIDIA's role within the broader ecosystem of AI and HPC hardware providers but does not delve into specific details about NVIDIA's AI strategy, supply chain, or Jensen Huang's insights.

"On one side, we have the established GPU giants led by NVIDIA and AMD with Intel mostly in the background, but never to be completely discounted."

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943. Open to Debate

Episode: Is Europe Too Late to Compete in the Chip War?

Date: 2025-11-07 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The discussion covers barriers to entry in the semiconductor and AI chip industry, including mention of NVIDIA's CUDA platform as a competitive advantage, emphasizing the challenges Europe faces to compete in the chip war.

"Open source is winning. Open standards, AI framework are spreading over. And our challenging NVIDIA de facto proprietary standard called CUDA, which has been actually one of the main reasons why NVIDIA is so successful."

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944. The AI Podcast

Episode: U.S. Chipmaking Dreams Confront Global Competition

Date: 2025-07-29 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses recent developments in the US semiconductor industry, including comments by NVIDIA CEO Jensen Huang regarding chip export restrictions and competition, highlighting his stance on innovation over limiting shipments.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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945. AI for Non-Profits

Episode: The Semiconductor Roadmap for U.S. Industry

Date: 2025-09-16 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses recent developments in the semiconductor industry including NVIDIA CEO Jensen Huang's response to chip export restrictions and competition dynamics. It highlights Huang calling out a competitor CEO over export control stances and mentions U.S. government AI chip export policies impacting the industry.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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946. AI HR

Episode: How the U.S. Is Competing in Global Chip Markets

Date: 2025-09-16 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses semiconductor export controls affecting NVIDIA and mentions Jensen Huang's critical response to competitors' positions on exports, highlighting some industry tensions but with limited detail on NVIDIA's AI strategy or supply chain.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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947. The Future of Everything News

Episode: Can U.S. Tech Catch Up in Semiconductor Race?

Date: 2025-09-16 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The podcast discusses recent industry developments including U.S. chip export restrictions and features a mention of NVIDIA CEO Jensen Huang responding to competitor Anthropic's position on export controls, highlighting some industry tensions and NVIDIA's stance on innovation and shipping practices.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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948. Schwab Network

Episode: A.I. Networking & Security Key in CSCO Earnings, Competition from ANET to NVDA
Date: 2025-11-12 | Relevance: 65/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Cisco's competition with NVIDIA in AI networking, mentioning NVIDIA's acquisition to provide an entire technology stack including networking, and the challenges Cisco faces in gaining traction against NVIDIA and Arista. It highlights AI networking revenue growth as a key focus area and examines competitive dynamics.

"NVIDIA's acquisition in 2022 got itself into that networking. So now it's providing that entire, you know, stack, including the networking."

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949. Venture Science Deep Dive

Episode: The Next Big Markets: 2040 Playbook for Investors
Date: 2025-02-19 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's role as a key player in providing GPUs for AI workloads within the competitive cloud services market, highlighting their importance in the AI revolution alongside cloud providers like Google and AWS. It emphasizes the significance of AI hardware and software developments and the competitive landscape investors should watch.

"Companies that provide cloud infrastructure specifically designed for AI workloads, those are going to benefit immensely from the increasing demand for computing power to train and run these complex AI models. So companies like NVIDIA, where they're powerful GPUs? Exactly. NVIDIA is a key player, but don't overlook the cloud providers themselves like Google Cloud and Amazon Web Services."

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950. Data Skeptic AI

Episode: Nvidia Reaches Record $57B Revenue in AI Megatrend
Date: 2025-11-20 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record quarterly earnings amid AI market hype, highlighting how the company continues to fund AI startups and maintain market momentum, with a bullish tone on CEO Jensen Huang's outlook.

"The founder and CEO, Jensen Wang, he seems very bullish. People are talking about the AI bubble popping, but Nvidia keeps shocking people and keeps the market rally going."

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951. Open AI

Episode: Record Nvidia Earnings Trigger Debate
Date: 2025-11-20 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's record-setting quarterly earnings which challenge skepticism around the AI bubble, highlighting Nvidia's continued market strength and investments in major AI companies. The host mentions CEO Jensen Huang's bullish outlook on the company's position amid AI market debates.

"Nvidia continues to just shock people and keeps the market rally going forever. Partly because they keep giving money to AI companies who turn around and give it back to them."

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952. jawbreaker.io

Episode: Clash of Titans: Anthropic vs Nvidia in the AI Development Debate
Date: 2025-06-17 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses comments attributed to NVIDIA CEO Jensen Wang regarding AI development and transparency, highlighting a recent exchange with Anthropic's CEO about AI safety and open development practices.

"Wang, who disagrees with many of Amadei's viewpoints, emphasizes the necessity for open AI development. He argues against secretive practices, insisting that transparency is And that's the reason why AI is crucial for safety."

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953. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: Why AI Compute Consumption Isn't Slowing Down
Date: 2025-02-28 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses market sentiments and challenges around AI infrastructure spending, mentioning NVIDIA's delayed Blackwell GPUs and the impact on AI stocks. It reflects on Microsoft's changing AI compute strategy and its implications, indirectly relating to NVIDIA's role in the AI hardware market.

"Then there were news of delays for NVIDIA's Blackwell GPUs, the deep-seek moment, each causing a stumble for AI stocks."

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954. Tech Brew Ride Home

Episode: Has China Shut The Door On Nvidia?
Date: 2025-08-22 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses the halt of NVIDIA's H20 chip production prompted by China's security concerns, including China's urging of local firms to avoid using these chips, highlighting challenges in NVIDIA's China market despite previous regulatory clearing.

"The information is reporting that NVIDIA has apparently told suppliers like Amcor and Samsung to halt H20 chip production after China urged local tech firms to avoid using H20 chips over alleged security concerns."

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955. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses U.S. efforts to bolster AI manufacturing and supply chain resilience, highlighting NVIDIA CEO Jensen Huang's praise for government initiatives that support domestic technology and manufacturing. The mention touches on NVIDIA's role in promoting American chip sales and supply chain strength amid AI and military manufacturing focus.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States, he said at a May 24th Swedish event. Manufacturing in the United States, securing our supply chain, having real resilience, redundancy, and diversity in our manufacturing supply chain, all of that is excellent."

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956. The Journal.

Episode: The Tech CEO Leading Nvidia's Main Rival
Date: 2025-12-09 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's dominant position in the AI chip market and highlights AMD as its main competitor, emphasizing NVIDIA's status as a market leader and the industry impact of its early move into AI computing chips.

"NVIDIA controls 90% or more of the advanced AI chip market."

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957. Money Matters with Hongbin Jeong and Chua Tian Tian

Episode: Market View: Nvidia's earnings in focus; China planning overhaul of commodities market to attract global investors; Tencent's subsidiary snaps up stake in SM Entertainment; Singapore's real wages up at a faster rate of 3.2% in 2024; OCBC, Amara to watch
Date: 2025-05-28 | Relevance: 65/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses investor anticipation and expectations around Nvidia's upcoming earnings report, with attention to potential volatility in options trading and the impact of external factors like tariffs and chip bans. There is mention of watching for CEO Jensen Huang's comments on future guidance amid these challenges.

"A lot of Nvidia shareholders and investors will be looking at what Mr Jensen Huang will say during the earnings call tonight, especially on the future guidance in regards to what Nvidia is going through now, the ongoing tariff war, the chips ban, etc."

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958. Debug Mode

Episode: VIDA E MORTE DO GOOGLE STADIA - Debug Mode #534 - Podcast
Date: 2025-04-29 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The speaker discusses NVIDIA's dominant market share in PC graphics cards, the high prices, quality issues of the RTX 50 series, and the lack of strong competition from AMD and Intel leading to innovation slowdown. They express concern over the negative impact of NVIDIA's market dominance on product quality and pricing.

"'E que, tipo assim, a AMD tem uma estrategia diferente da NVIDIA, ne? Literalmente, NVIDIA, ne? O PC, de certa forma, ta complicado. [...] 85% do mercado era da NVIDIA... Tanto que as placas estao ficando cada vez mais caras e cada vez piores.'"

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959. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: US Semiconductor Landscape: Challenges and Opportunities
Date: 2025-07-27 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent developments in the semiconductor industry, touching on NVIDIA CEO Jensen Huang's response to export control policies and competitive dynamics, including his commentary on chip export restrictions to China.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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960. Computer und Kommunikation

Episode: Siegeszug der ARM-Prozessoren / KI-Chatbots als Erpresser / KI-Gesundheitsapps
Date: 2025-06-14 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's introduction of its DGX Spark supercomputer and the Grace processor, highlighting the company's strategy to expand into personal computer processors as competition to Intel. It also covers the broader context of ARM processors gaining market share, with mention of NVIDIA's efforts in AI hardware and partnerships.

"Das war der NVIDIA-Chef Jensen Huang auf der Computex in Taiwan letzten Monat. Dort zeigte er den Prototypen eines Supercomputers im Format eines Mini-PC. Motherboard und PC-Hersteller sollen die Hardware liefern. Der Prozessor wiederum, Grace soll er heien, der kommt von NVIDIA selbst, wird bislang in den KI-Beschleunigern des Konzerns verbaut und soll eben kunftig auch fur

Personal Computer verkauft werden."

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961. Motley Fool Money

Episode: The AI Infrastructure Opportunity: 3 Fools Weigh In
Date: 2025-10-06 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses AI investment opportunities, primarily focusing on Alibaba's AI strategy, with a brief mention of Jensen Huang, NVIDIA's CEO, reflecting on the limits of Moore's Law and AI computing. NVIDIA is mentioned mainly in relation to competition and AI chip development, but without deep dive into its AI strategy or supply chain.

"Several years ago, right before everything exploded with ChatGPT and our lives changed without any chance of looking back, Jensen Huang, CEO of NVIDIA, said that the gains out of Moore's Law were coming to an end, meaning thereby this sort of linear ability to pack more and more information on a chip had run out."

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962. Generative AI 101

Episode: How Nvidia Took Over the AI Game
Date: 2026-01-12 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode introduces a discussion focused on NVIDIA, highlighting its central role in building hardware crucial for AI development and previewing plans for multiple upcoming episodes covering NVIDIA and related AI industry events. The host emphasizes the significance of NVIDIA in the AI space as part of a broader effort to increase AI literacy.

"Somewhere buried beneath the flashing ads, synthetic voices and 3D rendered game world. There's a piece of silicone working harder than you ever will. All due to NVIDIA."

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963. Daily Tech News

Episode: Nvidia Reports $57B Revenue, Fueling Bubble Speculation
Date: 2025-11-20 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses Nvidia's record quarterly earnings amidst AI bubble speculation, noting Jensen Huang's bullish outlook and Nvidia's strategy of investing in AI companies that reinforce its market position. However, skepticism remains about whether the AI bubble is truly deflating.

"People are talking in these, you know, like, oh my gosh, the AI bubble is about to pop and the stock market is going to crash. Jensen Wang, he seems very bullish."

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964. Nanalyze

Episode: The Ultimate NVIDIA Valuation Guide
Date: 2025-02-13 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: This Nanalyze podcast episode provides an overview of NVIDIA's valuation by comparing it to a profitable food truck business, discussing company profitability and investment considerations. The focus is on valuation methodology rather than details on NVIDIA's AI strategy, supply chain, or competition.

"No stock has talked about more these days than NVIDIA. Since we first invested in the stock nearly a decade ago at a $40 billion market cap, it's now become one of the biggest companies in the world today."

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965. Daily Tech Headlines

Episode: China Orders Cancellation of Nvidia Chip Orders - DTH
Date: 2025-09-17 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses China's order for cancellation of Nvidia RTX Pro 6000D chip orders as part of anti-monopoly actions and Nvidia's significant $15 billion investment in the UK, highlighting both regulatory challenges and expansion efforts.

"China ordered top technology firms, including ByteDance and Alibaba, to halt testing as well as cancel orders for the Nvidia RTX Pro 6000D chips."

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966. Moonshots Podcast: Superstar mindsets and success habits

Episode: Nvidia CEO and Co-founder - Jensen Huang
Date: 2025-06-06 | Relevance: 75/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode features a discussion about NVIDIA's CEO Jensen Huang, focusing on his leadership in driving the company's growth through key industry waves like gaming, Bitcoin, and generative AI. The hosts highlight Huang's innovation and long-term vision but the discussion is more high-level and inspirational rather than detailed on specific AI strategy, supply chain, or competition topics.

"He has caught three distinct waves, gaming, Bitcoin, and now generative AI. And he comes with a load of insights on how you can build for the long term."

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967. Market Mover

Episode: Tutti i perche della mossa di Nvidia su Intel
Date: 2025-09-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's $5 billion investment in Intel, highlighting a strategic shift in the semiconductor landscape where Nvidia has overtaken Intel as the market leader amid the AI boom. The conversation provides context on Nvidia's market position relative to Intel but does not delve deeply into Jensen Huang's statements or Nvidia's AI strategy, supply chain, or competition.

"La notizia che vogliamo approfondire e l'investimento di 5 miliardi di dollari di Nvidia in Intel. Un cambio di paradigma perche fondamentalmente Intel e sempre stata societa leader di mercato ma ovviamente e stata sopravanzata da Nvidia in questa fase storica."

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968. Rob Black Show

Episode: Traders Pored Over Nvidia Earnings Results
Date: 2025-08-28 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's recent earnings beat that confirmed the AI trade, mentioning that results were positive but not strong enough to broadly uplift the market. The impact of China being excluded from results is noted, and there is some cautious analysis of Nvidia's performance from an analyst perspective.

"Nvidia beat earnings and revenue expectations, but not by a lot. Had China been in play, it would have been by a lot. When you're talking about just a couple billion for a company that's worth a trillion, it's almost insignificant."

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969. We Study Billionaires - The Investor's Podcast Network

Episode: TECH002: Jensen Huang & NVIDIA w/ Seb Bunny - Review of The Thinking Machine by Stephen Witt
Date: 2025-09-24 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses NVIDIA's evolution from gaming graphics to a central player in AI, focusing on Jensen Huang's leadership and insights from the book 'The Thinking Machine'. The conversation revolves around strategic lessons and market shaping attributed to Huang's role at NVIDIA.

"We cover how NVIDIA evolved from a gaming graphics to the center of the AI revolution and what Jensen Huang's leadership can teach us about building markets and shaping the future of tech."

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970. The ITPro Podcast

Episode: September rundown: The UK becomes an AI playground
Date: 2025-09-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's significant $11 billion investment in the UK's AI infrastructure as part of a broader multi-billion dollar investment wave by major tech companies. Jensen Huang's positive remarks about the UK's AI potential and ecosystem are mentioned, highlighting NVIDIA's commitment to advancing AI through this regional investment.

"NVIDIA CEO Jensen Huang having recently described the region as being in a Goldilocks circumstance due to its strong AI ecosystem and rich academic history."

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971. The ITPro Podcast

Episode: September rundown: The UK becomes an AI playground
Date: 2025-09-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses significant investment in the UK AI ecosystem, highlighting NVIDIA's $11 billion pledge as part of a broader spending surge by big tech. It mentions CEO Jensen Huang's positive view of the UK as an AI hub but offers limited detail on NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA CEO Jensen Huang having recently described the region as being in a Goldilocks circumstance due to its strong AI ecosystem and rich academic history."

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972. CNBC's "Fast Money"

Episode: Energy Climbs After Maduro Capture, And An Exclusive Interview with Nvidia's CEO 1/5/25
Date: 2026-01-05 | Relevance: 60/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features an exclusive interview with Nvidia CEO Jensen Huang at CES, focusing on his keynote and providing insights on Nvidia's current position. It touches upon developments impacting Nvidia amid broader market and geopolitical events but primarily highlights Huang's input on Nvidia's trajectory and strategy in AI and technology.

"We are watching shares of NVIDIA. CEO Jensen Huang takes the stage at CES. All the headlines from his keynote and an exclusive interview with the CEO himself."

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973. Primer Click

Episode: Primer Click 28 de agosto
Date: 2025-08-28 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses Nvidia's recent financial results, highlighting a slight disappointment but overall market optimism. It mentions a projected slowdown in Nvidia's business influenced by the US-China conflict, and notes the impact on Nasdaq and other indices.

"La firma de semiconductores decepciono levemente en lo general, cumplio con las expectativas del mercado, pero si admitio en sus proyecciones una desaceleracion en su negocio, afectado en parte tambien por el conflicto entre Estados Unidos y China."

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974. Motley Fool Money

Episode: Nvidia's Big Number
Date: 2025-05-29 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's recent earnings release and its market impact alongside other economic topics like tariffs. The tone is generally positive, highlighting Nvidia's influence on the market and a 'relief rally' benefiting associated manufacturing sectors.

"Markets also being lifted by NVIDIA. So, okay, let's talk NVIDIA. Tim, you and I were at Venture Access co-working space yesterday afternoon, and we got to talking a bit about those results."

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975. Lex Fridman Podcast Fan

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's substantial $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic significance of this deal in AI infrastructure growth. The host explains CoreWeave's situation and NVIDIA's role in accelerating AI infrastructure expansion through this investment.

"NVIDIA has just made a massive investment deal of $2 billion towards CoreWeave, who has a ton of debt, to help them add 5 gigawatts of AI compute."

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976. The Elon Musk Update

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the significance of the deal and CoreWeave's existing relationship with NVIDIA as a data center operator. The conversation includes background context on CoreWeave's situation and NVIDIA's role in supporting AI infrastructure growth.

""NVIDIA has just made a $2 billion investment in CoreWeave, which will help them add 5 gigawatts of AI compute.""

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977. The Journal AI

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses NVIDIA's significant $2 billion investment in CoreWeave, highlighting CoreWeave's growth in AI infrastructure and their close relationship, indicating NVIDIA's strategic moves in AI compute capacity expansion.

"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

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978. The Flash: Technology

Episode: AI Innovations: DeepSeek, Ernie Bot, and OpenAI
Date: 2025-02-14 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's dominance in AI chips, especially in training and inference through its GPUs and CUDA platform, while comparing it to emerging Chinese competitors leveraging DeepSeek's AI platform to bridge the gap.

"Here's the quote: "Despite these advancements, NVIDIA remains a formidable competitor. How are they maintaining their dominance? NVIDIA continues to dominate the market even for inference tasks, due to its powerful chips and the CUDA parallel computing platform.""

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979. Candace Owens Fan

Episode: Why Nvidia's Export Control Position Could Change Everything
Date: 2025-10-14 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the arrest of two individuals smuggling NVIDIA AI chips to China, the resulting controversy over export controls, and NVIDIA's stance on these allegations. It touches on broader issues regarding U.S.-China tensions and the AI chip supply chain but does not feature direct commentary from Jensen Huang or detailed NVIDIA strategy discussion.

""Two people were just arrested for smuggling AI chips to China and the rumors basically point to the fact that these were NVIDIA chips.""

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980. The Elon Musk Update

Episode: AWS Chip Line Reaches Billions, Fueling Cloud AI Growth
Date: 2025-12-06 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's dominance in the AI chip market and mentions emerging competition from AWS's new chip business led by Amazon. It highlights NVIDIA's entrenched position but acknowledges AWS's growing multi-billion dollar chip initiative and its cloud infrastructure advantage.
"Can anybody stop NVIDIA's AI chip dominance? Most would say no because they are so ingrained."

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981. DevOps Sauna from Eficode

Episode: Vibe Coding and Supply Chain Security
Date: 2025-07-18 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses security and supply chain challenges in AI, mentioning NVIDIA's Morpheus platform for AI-based anomaly detection as a tool to handle vast amounts of data. It emphasizes the need for developer education and zero trust DevOps in the context of AI security, referencing concepts applicable to NVIDIA's AI strategy and technology.
"But now we can use things like NVIDIA Morpheus to parse massive amounts of data and make it useful in a human readable way."

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982. Bloomberg Tech

Episode: TSMC Beats Expectations, Raises Revenue Outlook
Date: 2025-10-16 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses TSMC's increased sales growth outlook driven by strong AI demand, highlighting that TSMC manufactures chips for NVIDIA and noting that NVIDIA is expected to supply significant AI customers, including OpenAI. The discussion provides some insights into supply constraints and capacity expansion impacting NVIDIA indirectly.
"They realize that NVIDIA is going to have to supply those customers. And the trends are going up from here."

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983. The AI News Daily Brief

Episode: Perplexity AI's Challenges, Nvidia's Insights, and Meta's European Push
Date: 2025-03-21 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's CEO Jensen Huang announcing a massive investment of hundreds of billions of dollars into the US supply chain over the next four years, highlighting the company's significant strategic move amid the competitive AI landscape. NVIDIA is mentioned as a backer of Perplexity AI, indicating its involvement in supporting innovative AI startups.
"NVIDIA is set to invest hundreds of billions of dollars into the United States supply chain over the next four years, as announced by CEO Jensen Huang."

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984. Around the Horn in Wholesale Distribution Podcast

Episode: How AI and Stablecoins Are Rewiring the Supply Chain Economy
Date: 2025-07-25 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses a recent AI Summit event where Jensen Huang from NVIDIA commented on America's unique advantages in AI leadership, emphasizing the importance of energy infrastructure and policy support. The mention includes his surprising comment crediting President Trump for energy-related legislative support relevant to AI advancement, reflecting broader geopolitical and supply chain considerations for AI strategy.
"America's unique advantage that no other country can possibly have is President Trump."

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985. The Hardware Unboxed Podcast

Episode: Nvidia to Drastically Cut GPU Supply!?
Date: 2025-12-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses rumors about NVIDIA planning to cut GPU supply for the first half of 2026, touching on implications for the GPU market. The conversation includes a general overview of NVIDIA-related news but lacks detailed insights from company insiders or about Jensen Huang's specific AI strategy, supply chain, or competition.
"Speaking of NVIDIA stuff, do you want to talk about NVIDIA cutting supply? I did hear about that rumor."

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986. News

Episode: News - 2025-08-14
Date: 2025-08-14 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast covers a U.S. policy requiring NVIDIA and AMD to share revenue from chip sales in China as a form of export licensing, potentially impacting their China market operations. It also discusses the implications of this policy on companies like TSMC, with analysts remaining optimistic about TSMC's outlook despite concerns.

"U.S. President Donald Trump confirmed that he had reached an agreement with NVIDIA granting an export license for its H20 chips, designed specifically for the Chinese market, on the condition of a 15% revenue share."

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987. Schwab Network

Episode: NVDA "Rising Tide," AVGO Accelerating Demand, GOOGL & AMZN Power Competition
Date: 2025-12-04 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast segment discusses NVIDIA's position in the AI semiconductor market, noting competition from Google, Amazon, AMD, and others, with the analyst expressing a positive outlook on the overall growth opportunity rather than direct concerns about competition.

"I think there's plenty of room for Google to succeed with the TPU, for Amazon to succeed with Terranium, for NVIDIA to succeed wildly with their chips and also for AMD to participate."

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988. AI Today

Episode: Reshoring Chip Production: U.S. Hopes and Hurdles
Date: 2025-09-16 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent semiconductor industry developments including export controls affecting U.S.-made AI chips and mentions a notable interaction where NVIDIA CEO Jensen Huang criticized a competitor's stance on chip export restrictions to China. This gives some insight into NVIDIA's position on supply chain and competitive dynamics.

"NVIDIA CEO, Jensen Huang, kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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989. The Jaeden Schafer Podcast: Inspired by Joe Rogan, Lex Fridman, Tucker Carlson

Episode: Navigating the Shifting U.S. Semiconductor Terrain
Date: 2025-07-29 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent semiconductor industry developments including NVIDIA CEO Jensen Huang's response to competitor Anthropic's CEO regarding US chip export restrictions to China, highlighting some strategic disagreements. It touches on policy shifts and competitive dynamics affecting NVIDIA's AI chip shipments but lacks in-depth detail on NVIDIA's AI strategy or supply chain.

"In fact, to the point where NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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990. Practical: AI & Business News

Episode: Breaking Down Barriers in the U.S. Chip Sector
Date: 2025-07-29 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent semiconductor industry developments, including U.S. export restrictions and industry competition; NVIDIA is mentioned in relation to CEO Jensen Huang's response to chip export controls and involvement in AI chip exports.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

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991. The John Batchelor Show

Episode: 2/2: #TARIFFS: FREE TRADE AND NVIDIA CHIPS. JOHN COCHRANE, HOOVER
Date: 2025-03-15 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the strategic implications of chip sourcing, mentioning NVIDIA as an example of a U.S. company producing chips in Taiwan using sophisticated European machinery amid geopolitical tensions. It highlights the balance between free markets, innovation, and national security concerns in economic competition against China.

"They are actually made in Taiwan for an American company, NVIDIA, on machines that are built by ASML in Europe. They're a combination of geniuses. But are they also part of a warfare situation, economic warfare?"

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992. The AI Policy Podcast

Episode: China's EUV Manhattan Project and Export Control Mythbusting with Chris McGuire
Date: 2025-12-22 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses China's EUV program and addresses narratives around export controls and competition in the chip industry, specifically pushing back on claims that Huawei is a viable competitor to NVIDIA. It highlights skepticism about China's chip advancements compared to NVIDIA's leadership.

"the narrative that Huawei is really good. They're making all these chips. They're really great. They're a competitor to NVIDIA. But you actually look at the data, including data that Huawei has said themselves. And it's clear that actually they're not a viable competitor to NVIDIA"

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993. Tech Industry Daily: Breaking News & Analysis

Episode: Tech Titans Clash: AI Arms Race Heats Up at Computex!
Date: 2025-05-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's role and presence at Computex 2025, highlighting new collaborations such as Supermicro's server systems designed for NVIDIA's RTX Pro 6000 Blackwell processors and the company's anticipated announcements on AI hardware and regulatory matters affecting competition. Jensen Huang is expected to reveal advances but no direct quotes or detailed discussion from him are presented.

"NVIDIA's CEO, Jensen Huang, is expected to reveal significant advances in AI hardware and comment on regulatory-approval affecting major chip suppliers such as Samsung, which may influence the competitive dynamics among global chip makers."

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994. Bloomberg Tech

Episode: Tech Traders Shrug Off Maduro Ouster
Date: 2026-01-05 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast excerpt discusses U.S.-China trade dynamics including tariffs impacting AI chips and mentions Nvidia's market share and competition challenges. It notes upcoming guidance from Jensen Huang and mentions competition from other tech companies, highlighting both opportunities and issues for Nvidia.

"And as for NVIDIA and Tesla, they have other problems, really. I mean, NVIDIA has issues with TPUs coming online. And even though I do think that they have a lot of market share still, there are things to think about."

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995. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses U.S. efforts to bolster AI manufacturing and supply chain resilience, highlighting President Trump's AI initiatives and referencing NVIDIA CEO Jensen Huang's positive view of these efforts. Jensen Huang praised the president's push for American technology leadership and the importance of securing manufacturing supply chains in the U.S.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States."

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996. NPR News Now

Episode: NPR News: 01-07-2026 4AM EST
Date: 2026-01-07 | Relevance: 60/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang discussed the company's ramp-up of production for the AI chip H-200, highlighting strong Chinese demand and ongoing licensing issues with the Trump administration. The mention focused on NVIDIA's supply chain strategy amid regulatory changes allowing chip sales to China.

"NVIDIA CEO Jensen Huang says Chinese demand is high and the company has fired up its H-200 supply chain in anticipation."

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997. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses U.S. efforts to boost AI manufacturing and secure supply chains, mentioning NVIDIA CEO Jensen Huang praising the administration's initiatives to support technology leadership and manufacturing resilience. It highlights Huang's support for policies aimed at enabling American companies like NVIDIA to sell chips globally and strengthen domestic production.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States, he said at a May 24th Swedish event. Manufacturing in the United States, securing our supply chain, having real resilience, redundancy, and diversity in our manufacturing supply chain, all of that is excellent."

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998. NPR News Now

Episode: NPR News: 01-07-2026 12PM EST
Date: 2026-01-07 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast reports that NVIDIA is ramping up production and sales of its H-200 AI chips to China, with the U.S. government recently approving these sales. Jensen Huang is mentioned discussing strong demand and ongoing licensing issues with the administration.
"Speaking at the Consumer Electronics Show in Las Vegas, NVIDIA CEO Jensen Huang says Chinese demand is high and the company has fired up its H-200 supply chain in anticipation."

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999. Digital Frontline: Daily China Cyber Intel

Episode: Microsoft, Nvidia Tangled in US-China Cyber Crossfire: Whos Hacking Who?
Date: 2025-08-01 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's scrutiny by China's cyberspace administration over alleged backdoors in its AI chips approved for the Chinese market and the broader implications of US-China tensions on NVIDIA's supply chain and regulatory challenges. While NVIDIA denies any hidden access, the discussion highlights ongoing geopolitical tensions affecting the company.
"NVIDIA insists there's no hidden access, but, you guessed it, the narrative on both sides just fuels suspicions and more regulatory headaches from multinationals."

1000. Bloomberg Intelligence

Episode: xAI to Raise $20 Billion After Nvidia and Others Boost Round
Date: 2025-10-08 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's involvement in providing GPUs and investing in Elon Musk's AI startup xAI, highlighting the financing structure and NVIDIA's $2 billion equity contribution. It also touches on Jensen Huang's remarks betting on xAI achieving significant infrastructure capacity first.
"Jensen Huang has talked about this, saying that he's betting Elon Musk can get to one gigawatt of capacity first."

1001. The Exchange

Episode: The Exchange 7/14/25
Date: 2025-07-14 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA CEO Jensen Huang's upcoming trip to China amidst U.S.-China trade relations and AI restrictions, highlighting his perceived role in maintaining communication between the two countries and access to the Chinese market.
"NVIDIA CEO Jensen Wang is heading out there for a media briefing, I believe it is, in a couple of days' time. And in fact, some kind of see him as a go-between between China and the U.S. on the trade front."

1002. Israel Today: Ongoing War Report

Episode: Israel Today: Ongoing War Report - Update from 2026-01-07 at 08:07
Date: 2026-01-07 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly reports that NVIDIA CEO Jensen Huang plans a visit to Israel to expand the company's presence and workforce, including potential partnerships and a new campus, highlighting Israel's importance in AI development.
"NVIDIA chief executive Jensen Huang said he plans to visit Israel soon to strengthen the company's footprint in the country and amplify its local workforce, which now numbers about 5,000."

1003. Calling All Platforms Tech and Gaming News

Episode: Google I/O 2025
Date: 2025-05-28 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses NVIDIA's RTX 5060 launch, highlighting issues such as limited availability, strict reviewer agreements, and delays in driver releases, criticizing NVIDIA's approach to media relations and product launch transparency.
"There Was An RTX 5060 Moving On NVIDIA Announced The 5060... What Is Terribly Unusual Is The Ridiculously Small Number Of Them That Were Being Sent Out Seemingly Only To Those Reviewers Who Were Willing To Sign Some Kind Of Agreement With NVIDIA Regarding The Type Of Coverage They Would Be Journalistic Lack Of Integrity."

1004. PC Perspective Podcast

Episode: Podcast #809 - RX 9070 Release Date, X3D Rules, RTX 5070 Ti Leak, Lots of Quarterly Financials and AI Granny
Date: 2025-02-08 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]
Summary: The podcast discusses NVIDIA's recent GPU releases, highlighting performance expectations, pricing strategy, supply availability issues, and margin comparisons to competitors. The conversation reflects some concerns about product availability and market positioning in the mid-range sector but also notes NVIDIA's relatively strong margin performance.

"Availability of the 5,000 series is awful. Oh, the availability. Yeah. That's the story with the launch."

1005. Geekshow Podcast

Episode: Geekshow Arcade: Jarron's Hollow Victory
Date: 2025-10-24 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses AMD's upcoming GPU technology for the next-gen PlayStation console, highlighting similarities to NVIDIA's RTX GPUs and innovations like GPU bandwidth compression. There is a recognition of NVIDIA's GPU features but no direct insights from Jensen Huang on NVIDIA's AI strategy, supply chain, or competition.
"By the end of it I was like, oh, they're building an RTX 5080."

1006. Unhedged

Episode: AI peak is peak AI
Date: 2025-10-09 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's role within the interconnected AI industry ecosystem, touching on its chip manufacturing and investments in other AI companies like OpenAI. The conversation highlights complex collaboration and competition dynamics among major tech players in AI without delving deeply into NVIDIA's AI strategy, supply chain, or competitive positioning specifically via Jensen Huang.
"NVIDIA, for example, investing in OpenAI and saying it would invest more."

1007. Geekshow Podcast

Episode: Geekshow Arcade: Jarron's Hollow Victory
Date: 2025-10-24 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses AMD's upcoming GPU technology for the PlayStation 6 and compares it to NVIDIA's current GPU features, noting they appear to be copying NVIDIA's innovations like tensor and RTX cores, while also highlighting AMD's new compression technology to address GPU bandwidth bottlenecks, which NVIDIA does not yet use.
"The easiest way to sum this up is they're pretty much copying NVIDIA's GPUs."

1008. No Tiene Nombre

Episode: NTN 416 - Microsoft local, Nvidia negociando e IA obligatoria
Date: 2025-08-30 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt discusses Microsoft's use of NVIDIA's H100 GPUs to train advanced AI models and touches on the high cost of these GPUs, implying NVIDIA's strategic position in AI hardware supply. It also briefly mentions ongoing issues involving NVIDIA, AMD, China, and US policy.
"Nvidia H100. Para que tengan una idea, las H100 cuestan basicamente mas que un auto nuevo. Asi que, segun los numeros grandes, aqui Microsoft se ha gastado mas dinero en entrenar este modelo que algunos paises con su PA y B-Anual."

1009. Investing Experts

Episode: Don't fear AI bubble, there will be winners - Tech Contrarians
Date: 2025-09-30 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's financial commitments and partnerships in AI, noting significant investments like those with OpenAI and CoreWeave; however, it frames these moves within concerns about sustainability of spending and the potential for an AI bubble, without deep specifics on NVIDIA's strategic details.
"There's a lot of money moving around, especially this quarter from OpenAI committing money to Oracle, NVIDIA committing money to OpenAI, NVIDIA also committing money to buyout capacity from CoreWeave."

1010. Las Mananeras

Episode: Se acabo el dominio de Nvidia
Date: 2025-04-28 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses the potential challenges to Nvidia's dominance in the AI microchip market, highlighting Huawei's new AI chip and US government restrictions impacting Nvidia's sales in China, as well as competition from companies like AMD, Intel, and tech giants developing in-house chips.
"Nvidia possibly este en problemas el dominio historico que ha tenido sobre el mercado de microchips, porque Huawei, en China, acaba de anunciar que van a tener un... Bueno, ya tienen mas bien un microchip de inteligencia artificial que estan listos para empezar a hacer pruebas con, lo cual podria empezar a suplir todas las ventas de Nvidia dentro de China y en otros mercados asiaticos."

1011. Top Expansion Tecnologia

Episode: Fallas de AWS dejan en pausa a streaming, aerolineas y mas
Date: 2025-10-21 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's progress in local chip manufacturing through its partnership with TSMC and production of Blackwell chips in the USA, highlighting the strategic importance amid US efforts to reduce dependence on Asian components. Jensen Huang is noted as acknowledging these Blackwell chips as NVIDIA's most advanced.

"TSMC, a pesar de ser la empresa mas importante de Taiwan a nivel tecnologico, ha hecho importantes acuerdos con la administracion de Trump. Una muestra de ello es la inversion de 165 mil millones de dolares que anuncio a inicios de 2025. Asimismo, la planta de fabricacion en Arizona finalmente se puso en marcha. Ahi es donde se producen los chips Blackwell, los mas avanzados de Nvidia de acuerdo con su CEO Jensen Huang."

1012. WSJ Tech News Briefing

Episode: TNB Tech Minute: Nvidia, AMD to Give U.S. a Cut of AI Chip Sales to China
Date: 2025-08-11 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses a deal where the U.S. administration will receive a 15% cut of sales revenue from Nvidia's export of AI chips to China, following a meeting between CEO Jensen Huang and President Trump, but does not delve deeply into Nvidia's AI strategy, supply chain, or competition.

"According to people familiar with the matter, the administration will receive 15% of sales revenue as part of a deal to approve exports of Nvidia's H20AI chip to China."

1013. Squawk on the Street

Episode: Nvidia CEO's Message to Investors, Gold's Record Run, Tesla's Cheaper EVs 10/8/25
Date: 2025-10-08 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features a discussion about NVIDIA and its role in the AI arms race, including commentary on Jensen Huang's recent interaction with investors and the broader excitement around the company's impact on the industry. While not deeply detailed, it affirms NVIDIA's significant influence and investor enthusiasm.

"Jensen Wong talking a lot about the evolution between being a tech industrial and creeping elements of a financial company, too."

1014. Better Offline

Episode: The Anti-Consumer Electronics Show with Steve Burke
Date: 2026-01-14 | Relevance: 70/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast hosts discuss the NVIDIA keynote at CES, noting that despite some interesting announcements such as DLSS 4.5 and architectural details like Vera Rubin, much of the substantive news was buried deep in the presentation and not well highlighted. They remark that the event felt like a compilation of previous GTC speeches without strong new content emphasis.

""The actual presentation felt like they just stapled together a few GTC speeches and then gave up.""

1015. The Last Invention is AI

Episode: The Promise and Pressure of U.S. Chip Expansion
Date: 2025-07-29 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses the U.S. semiconductor industry with a brief mention of NVIDIA's CEO Jensen Huang responding to competitor Anthropic's stance on U.S. chip export controls. It touches on regulatory changes affecting AI chip exports and the industry's competitive dynamics.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1016. Formosa English News

Episode: May. 1, 2025 Formosa Headline News
Date: 2025-05-01 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly covers a speech by NVIDIA CEO Jensen Huang at a U.S. government event, where he spoke about NVIDIA's commitment to building advanced AI supercomputers in the U.S., the impact of AI across various industries, and support from U.S. leadership for manufacturing acceleration. There is a passing mention of Huang's remarks on AI's transformative potential for manufacturing and industry.

"We are working on artificial intelligence for many industries, from healthcare to drug discovery to life sciences, financial services, education, so many different industries."

1017. TechStuff

Episode: The Story: Will NVIDIA Save or Ruin The World?
Date: 2025-11-12 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the rise of NVIDIA, noting its significant growth and dominant market value, with some conversation around investment confidence and AI industry skepticism. However, the discussion is from an investor's perspective rather than direct commentary from Jensen Huang regarding NVIDIA's AI strategy, supply chain, or competition.

"I think I am going to hold on. But the questions people have are, what if AI doesn't get better infinitely as it scales? What if people invent new chips that are far more efficient than the NVIDIA chips?"

1018. Lost Debate

Episode: Pretti Killing, ICE Impunity, NVIDIA Dominance
Date: 2026-01-28 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features an interview discussing NVIDIA and its CEO Jensen Huang, focusing on his unique leadership style and the company's prominence in technology. It contrasts Huang's focused approach with other tech leaders, highlighting admiration for his steady commitment to NVIDIA.

"I am absolutely fascinated by Jensen Huang and what makes him tick... Jensen, to me, is an admirable figure."

1019. AI News Daily

Episode: Google Launches AI Gemini Live, Ant Group Embraces Chinese AI Chips, FuriosaAI Rejects Meta Offer, AI Startup Browser Use Raises 17M, and more...
Date: 2025-03-24 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Ant Group's efforts to develop AI chips as competitive alternatives to NVIDIA's H800, highlighting Ant's continued use of NVIDIA chips alongside domestic solutions and the impact of U.S. export controls. This context touches on NVIDIA's competitive positioning and supply chain influence in the Chinese AI chip market.

"Ant Group is making strides in the AI sector by leveraging chips from Alibaba Group and Huawei Technologies to develop advanced AI models using the mixture of experts or MOE approach. This initiative aims to create a competitive alternative to NVIDIA's H800 chip."

1020. Earn Your Leisure

Episode: The Next Big AI Company Investors NEED to Know About!
Date: 2025-11-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA as a major player in the AI revolution, likening it to the heart of AI systems, but focuses more broadly on other related companies and the AI ecosystem rather than NVIDIA's specific AI strategy, supply chain, or competition. The mention serves as part of an analysis of the AI industry landscape with NVIDIA as a key reference point.

"Yeah, we know the big players. We know the NVIDIAs of the world... if I looked at Broadcom as like the connectivity, that would be like the veins and the arteries of this, right? But in order for the heart to work, it needs to have blood flow, right? And it needs to have valves."

1021. Jimbo Radio

Episode: Ep 39 Capitalism to Competition to Informedness with Misi
Date: 2025-06-11 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion compares NVIDIA and AMD in the GPU market, highlighting NVIDIA's position as the dominant player and noting a slowdown in innovation after reduced competition. It focuses on the competitive landscape rather than NVIDIA's AI strategy or supply chain.

"Basically they produce... NVIDIA produces GPUs. I mean, clearly, you know, they're all over the news, right? They're... What is it? They are now a trillion dollar company or even more probably with AI."

1022. GoodNightCoffee

Episode: ():AWS,AnthropicAI,Veo 3.1,X
Date: 2025-10-20 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang's planned attendance at the 2025 APEC CEO Summit where he will discuss AI, microchip technology, and supply cooperation with other industry leaders. However, the mention is brief and lacks detailed discussion on NVIDIA's AI strategy, supply chain, or competitive positioning.

"According to ReadHub and recent reports, NVIDIA CEO Jensen Huang has confirmed his attendance at the 2025 Asia-Pacific Economic Cooperation APEC CEO Summit, to be held this month in Jayongju, South Korea."

1023. Las Mananeras

Episode: Google vs Nvidia
Date: 2025-11-25 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the competition between Nvidia and Google in AI microchips, noting Nvidia as the undisputed leader and Google's recent moves to design its own AI chips and negotiate with Meta. It highlights Google's shift from buying Nvidia chips to developing specialized chips for different applications, indicating a competitive dynamic but does not include insights from Nvidia's perspective.

""Google tenia contratos de compra de microchips de Nvidia. Ahora esos contratos me imagino que no los van a estar pues utilizando. Estan buscando crear sus propios microchips.""

1024. CNBC's "Fast Money"

Episode: Fed Decision On Deck... And Novo Nordisk Gears Up To Report 5/6/25
Date: 2025-05-06 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast excerpt provides a discussion comparing AMD's recent performance and export restrictions to anticipated comments from NVIDIA, mentioning Jensen Huang's recent appearance. It speculates on supply chain dynamics, product delays, and upcoming earnings without detailed data on NVIDIA's AI strategy or competition.

"I mean, of course, Jensen Huang spoke today. We'll get to some of that interview later on."

1025. Monde Numerique (Actu Tech)

Episode: L'HEBDO 24/01 - Davos 2026 : comment l'IA redessine le monde
Date: 2026-01-24 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's view of AI as a critical infrastructure comparable to electricity and telecommunications, highlighting NVIDIA's pivotal role in the AI revolution and the massive investments needed in data centers and networks. It frames AI as a social and industrial turning point, positioning NVIDIA centrally in the global AI landscape as presented at Davos 2026.

"Et c'est ce que Jensen Huang appelle une infrastructure. Une infrastructure comparable a l'electricite ou au telecom."

1026. The Ravit Show

Episode: Agentic AI, DataRobot & NVIDIA Partnership and more
Date: 2025-05-22 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the excitement around NVIDIA GTC announcements, particularly focusing on agentic AI, NVIDIA's AI enterprise suite collaboration with DataRobot, and new products like Blackwell desktop CPU. The speaker highlights practical business use cases and integration efforts with NVIDIA's technologies.

"Yeah, so we actually just launched today a deep integration with NVIDIA's AI enterprise suite of capabilities."

1027. The Block Runner Crypto Podcast

Episode: 292. TBR - Metaverse Is Dead? | Jensen Huang CEO Lessons | NAT Bullies Bitcoin?!
Date: 2025-12-08 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Jensen Huang's approach to innovation at NVIDIA, highlighting the company's early development of CUDA technology foundational to AI, and drawing parallels with emerging blockchain technologies. It reflects on NVIDIA's culture of pioneering new technology before market demand exists.

"But anyway they were developing a technology called CUDA I believe like Barracuda. And it was completely faded and it was the foundation to AI LLMs."

1028. Regarde le monde

Episode: Jensen Huang, nouvelle star de la tech
Date: 2025-09-24 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode discusses Jensen Huang, NVIDIA's CEO, highlighting his personal background, the origins of NVIDIA's journey in a humble diner in San Jose, and the company's significant role in AI advancements, including its investment in OpenAI. It portrays Huang as a tech star and emphasizes NVIDIA's impact on the tech world.

"'...une plaque commemorative dans le diner sur laquelle on peut lire Qui aurait pu imaginer qu'une idee nee ici allait changer le monde ?'"

1029. Analytic Dreamz: Notorious Mass Effect

Episode: "NVIDIA INVESTING UP TO $100B IN CHATGPT OWNER OPENAI TO CREATE NEW AI BREAKTHROUGHS"
Date: 2025-09-23 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses a significant investment by NVIDIA in OpenAI, highlighting the strategic partnership among NVIDIA, OpenAI, and Google DeepMind, and contextualizing their valuations. It frames this alliance as a monumental event in technological advancement, emphasizing the scale of NVIDIA's investment in AI development.

"NVIDIA announcing up to a hundred billion dollar investment into OpenAI; some would say this is one of the more monumental moments in technological advancement history."

1030. The Amazing AI News

Episode: "Robotic Takeover. AI Milestone. Swiftie Mystery. "
Date: 2025-10-08 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's AI market impact and strategic partnership with OpenAI, highlighting CEO Jensen Huang's comments on the collaboration, while also noting stock market concerns due to a competing deal between OpenAI and AMD.

"According to NVIDIA's CEO, Jensen Huang, this collaboration is unique and sets a new precedent."

1031. The Future of Supply Chain: a Dynamo Ventures Podcast

Episode: #205: Data Meets Automation: How Robotics is Closing the Supply Chain Visibility Gap with Andrei Danescu of Dexory
Date: 2025-03-12 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's role in advancing robotics and industrial automation through their AI chips and software capabilities. The speaker expresses admiration for NVIDIA and Jensen Huang, highlighting the company's impact on industrial applications and the power of their technology to support reliable, data-driven robotics.

"I think NVIDIA has approached it from, you know, giving this technology the power to read them, the power to be able to use the data and the insights they gather through different sensors."

1032. Bloomberg Tech

Episode: Nvidia Becomes First $5 Trillion Firm, Lifted by AI Boom
Date: 2025-10-29 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode highlights NVIDIA's milestone as the first $5 trillion market cap company, touching on its stock gains driven by geopolitical discussions about its Blackwell chip. It includes mention of an interview with NVIDIA CEO Jensen Huang about relevant topics, though detailed content of the interview is not provided in the excerpt.

"NVIDIA is the first company to reach $5 trillion of market value, of market capitalization."

1033. Global News Podcast

Episode: From Silicon Valley to D.C.: Chips in Focus
Date: 2025-08-29 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses recent semiconductor industry developments, focusing on AI chip export controls and a public exchange involving NVIDIA CEO Jensen Huang criticizing competitor strategies. It highlights some regulatory challenges and industry dynamics affecting NVIDIA's market and supply chain.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1034. ChatGPT: News on Open AI, MidJourney, NVIDIA, Anthropic, Open Source LLMs, Machine Learning

Episode: Rebuilding America's Semiconductor Backbone
Date: 2025-07-29 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA in the context of the semiconductor industry's export restrictions and competitive dynamics, highlighting a public exchange where NVIDIA CEO Jensen Huang responded to Anthropic's stance on chip shipping restrictions. It provides some insight on industry regulations impacting NVIDIA but lacks deep details on NVIDIA's AI strategy or supply chain.

"In fact, to the point where NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1035. Open AI

Episode: U.S. Semiconductor Industry at a Crossroads
Date: 2025-07-29 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses US semiconductor industry developments and touches on a public statement by NVIDIA CEO Jensen Huang, where he responded to chip export control advocacy by a competitor. The mention offers some insight into NVIDIA's stance on

export controls but lacks deep detail on AI strategy or supply chain specifics.

"In fact, to the point where NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1036. The John Batchelor Show

Episode: Preview: Colleague Brandon Weichert comments that the DeepSeek claims and the Huawei workarounds for banned NVIDIA chips is a benefit to push AI Valley into innovation and results. More

Date: 2025-05-03 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses Huawei's workaround using available NVIDIA chips despite bans, highlighting how competition drives innovation in AI hardware. The conversation suggests that these competitive dynamics benefit the AI industry, indirectly reflecting on NVIDIA's role in the AI supply chain and competitive landscape.

"However, it does, at least in the legend of it, drive enterprise innovation competition."

1037. Bloomberg Tech

Episode: China Urges Local Firms to Avoid Nvidia H20 Chips

Date: 2025-08-12 | Relevance: 65/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast reports on China's internet regulator urging local firms like Alibaba and Tencent to cancel orders for Nvidia's H20 processors, reflecting regulatory challenges that Nvidia faces in the Chinese market. The discussion includes market reactions and implications for Nvidia's business in China.

"China's internet regulator had demanded that specific companies, including Alibaba and Tencent, cancel orders for H20."

1038. The Amazing AI News

Episode: "Unsafe Nvidia. Mortality Bot. AI Revolution. "

Date: 2025-08-10 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative

Listen to Episode

Summary: The podcast discusses concerns raised by Chinese state media regarding the safety of Nvidia's H20 chips, highlighting geopolitical tensions and security issues that could impact Nvidia's position in the AI chip market.

"China escalated its tech war with the US by expressing security concerns over Nvidia's H20 chips, as reported by Chinese state media."

1039. The Intelligence from The Economist

Episode: Deal them back in? What we heard in Iran

Date: 2025-12-01 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses NVIDIA's role in backing AI development, especially its partnership with Microsoft to support a rival to OpenAI called Anthropic, highlighting NVIDIA's chips as a key part of the AI training infrastructure. It touches on the competitive AI landscape and the strategic moves of major tech companies.

"On November the 18th, Microsoft and NVIDIA, who are two of the biggest backers of OpenAI traditionally, they threw their weight behind Anthropic, which is a big rival to OpenAI. And that means that for the first time, Anthropic will train its models on NVIDIA's chips and it will run some of its models on Microsoft's cloud platform."

1040. Audio:Communism's European Beginnings + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump

Date: 2025-05-26 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast mentions NVIDIA in the context of U.S. efforts to bolster AI manufacturing and supply chain resilience, highlighting CEO Jensen Huang's praise for governmental initiatives supporting American technology and manufacturing. It references a statement by Huang emphasizing the importance of domestic manufacturing and supply chain diversity for NVIDIA's global success.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States, he said at a May 24th Swedish event. Manufacturing in the United States, securing our supply chain, having real resilience, redundancy, and diversity in our manufacturing supply chain, all of that is excellent."

1041. The AI News Daily Brief

Episode: Meta's AI Shift, Pentagon's Agentic AI, and AWS's Kiro IDE Launch

Date: 2025-07-15 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses NVIDIA CEO Jensen Huang's optimistic view on how AI will change jobs, emphasizing job transformation and augmentation rather than elimination. Huang envisions a future where AI increases productivity and creates new job opportunities.

"NVIDIA's Chief Executive Officer Jensen Huang has a vision for the future that's both exciting and a little daunting. He's urging everyone to hop on the artificial intelligence train and learn how to harness it to transform their work lives."

1042. Next in Tech

Episode: NVIDIA GTC Bursts at the Seams
Date: 2025-04-08 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses the evolution of NVIDIA's GTC conference, highlighting how NVIDIA expanded its market opportunities from gaming GPUs to enterprise, supercomputing, and AI-related technologies like machine learning and deep learning. The conversation reflects an analyst's perspective on NVIDIA's strategic market broadening over time.

"Well, I think I've been to pretty much every GTC conference since like 2009 when they really started having them. And to start with, it was all gaming... and then machine learning and deep learning."

1043. Tax Notes Talk

Episode: The Nvidia Deal and Taxing Exports: The Constitutionality of It All
Date: 2025-09-12 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a recent deal between NVIDIA and the US government regarding AI chip exports to China, focusing on the tax-like nature of the agreement and its constitutional implications rather than NVIDIA's AI strategy, supply chain, or competition.

"In early August, the Trump administration announced a landmark deal with Nvidia and Advanced Micro Devices. In exchange for the ability to sell artificial intelligence chips in China, the companies agreed to pay the U.S. government 15% of their revenue from those chip sales."

1044. The Silicon Insider

Episode: Nvidia Bounces back & China vs USA
Date: 2025-02-22 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's recent stock recovery following a 'deep seek' scare and references an analyst raising the price target on Nvidia. There is speculation on whether Nvidia can sustain its growth given its past performance and potential upcoming financial results.

"They are once again threatening Apple for the top spot. They are still the hottest AI play, I would argue."

1045. Kinda Funny Gamescast: Video Game Podcast

Episode: Everything Announced w/ NVIDIA GeForce On at Gamescom - Kinda Funny Gamescast #sponsored
Date: 2025-08-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the Nvidia GeForce On community showcase at Gamescom, focusing on software announcements and ecosystem updates rather than new hardware. The tone is generally informative but lacks in-depth detail or direct quotes from Jensen Huang.

"They did Nvidia GeForce On community showcase highlighting a whole bunch of new announcements, updates to a lot of the programs and ecosystem that they have at this point. No new hardware. They made that clear going into this."

1046. Kinda Funny Gamescast: Video Game Podcast

Episode: Everything Announced w/ NVIDIA GeForce On at Gamescom - Kinda Funny Gamescast #sponsored
Date: 2025-08-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode discusses Nvidia's Gamescom event focused on software updates and partnerships, mentioning Nvidia's G Force On community showcase and the absence of new hardware announcements. It provides a general overview of Nvidia's promotional activities and software ecosystem without deep insights into AI strategy, supply chain, or competition.

"So the topic of the show is everything announced with Nvidia G force on at gamescom. They did a Nvidia G force on community showcase highlighting a whole bunch of new announcements, updates to a lot of the programs and ecosystem that they have at this point. No new hardware."

1047. Morning Brief

Episode: Nvidia invests $5B in Intel, Fed fallout, UK tech push
Date: 2025-09-18 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's $5 billion investment in Intel and their collaborative efforts on chip development, highlighting Nvidia CEO Jensen Huang's positive remarks on the partnership. The broader context includes Intel's challenges and market reactions, with some political figures acknowledging Nvidia's growing influence.

"Nvidia CEO Jensen Wang calling this collaboration historic and a fusion of two world-class platforms."

1048. TechONTAPPodcast

Episode: Episode 405 - NVIDIA SuperPod Updates - Fall 2025
Date: 2025-09-11 | Relevance: 60/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NetApp technical staff discuss their collaboration with NVIDIA on FlexPod and SuperPod AI solutions, highlighting ongoing work integrating NVIDIA technologies with NetApp storage architectures. The talk centers on partnerships and technical efforts involving NVIDIA's AI infrastructure products.

"I am a technical marketing engineer on the solutions team. I am focused on all things NVIDIA, SuperPod, NCP, which we'll get into I'm sure in a little bit here."

1049. Capital Flows and Asset Markets

Episode: MORE THOUGHTS ON AI, DEEPSEEK AND NVIDIA
Date: 2025-02-07 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The speaker briefly discusses NVIDIA in the context of its market position and potential as a short trade, viewing the company as a test case for investment strategies amid AI advancements.

"In many ways it looks like a perfect short and yet politically I could see how its position gets defended at least for a while."

1050. More or Less

Episode: Will the world really be 50 million workers short by 2030?
Date: 2025-09-13 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Jensen Huang, CEO of NVIDIA, citing his claim about a future shortage of 50 million workers by 2030 and his vision of humanoid robots as a solution. The discussion contextualizes Huang's statement with research from a consulting firm but does not deeply analyze NVIDIA's AI strategy, supply chain, or competition.

"We know very clearly that the world has severe shortage of human laborers, human workers. By the end of this decade, the world is going to be at least 50 million workers short."

1051. TechCheck

Episode: TechCheck Takes: The AI pressure cooker: OpenAI, Nvidia and Google all on the move 12/8/25
Date: 2025-12-08 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt references Jensen Huang's challenges navigating geopolitical tensions affecting Nvidia's access to China, highlighting the company's unique position of being banned on both sides. It situates Nvidia within the broader competitive landscape of AI alongside OpenAI and Google but offers limited detail on Nvidia's AI strategy, supply chain, or direct competitive actions.

"Nvidia has been banned from going to China, not to mention China has banned Nvidia going to China. I think we're the first company in history that has been banned on both sides."

1052. Newsthink

Episode: The Cousins Running Rival Tech Empires | Newsthink
Date: 2025-05-17 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the familial relationship between Jensen Huang of NVIDIA and Lisa Su of AMD, linking their Taiwanese heritage to their drive and success in the semiconductor industry. It provides background context on their family connection and cultural influence but lacks detailed information on NVIDIA's AI strategy, supply chain, or competition.

""I have extremely high standards. I really love to win. Run. Don't walk. Either you're running for food or you are running from being food.""

1053. Joe Rogan Experience Review podcast

Episode: 479 Joe Rogan Experience Review of Jensen Huang
Date: 2025-12-08 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Jensen Huang's personal story and character, touching on his journey and financial struggles before NVIDIA's success. There's limited direct discussion on NVIDIA's AI strategy, supply chain, or competition.

"She's probably buying NVIDIA stock as we speak."

1054. Playlist News : les meilleurs podcasts d'actualite

Episode: Sur le fil - Nvidia, ce geant mondial de la tech si discret (REDIFFUSION)
Date: 2025-08-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's historic market valuation milestone and its leadership in graphics processing units critical to artificial intelligence. It provides a brief history of NVIDIA and highlights its importance in computing power for AI, featuring commentary from external analysts and journalists.

"Le fabricant americain de cartes graphiques Nvidia a battu un record historique en franchissant le seuil des 4000 milliards de dollars de valorisation boursiere."

1055. AI Convo Cast

Episode: California's AI Safety Bill, Microsoft's In-House Models, and Nvidia's AI Chip Push
Date: 2025-08-29 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Jensen Huang's latest comments on Nvidia's AI chip sales to China within a broader conversation on AI developments, but does not provide detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"Nvidia CEO Jensen Huang's latest comments on the AI boom and chip sales to China."

1056. Gardez une tendance d'avance sur les marches avec Swissquote

Episode: KRACH annonce : vrai danger ou legende urbaine ? | Morningbull : le reveil des marches
Date: 2025-11-19 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA in the context of the tech market and AI developments, highlighting investor anticipation for NVIDIA to make significant announcements amid a quiet period following heavy AI news. The discussion is general, touching on market conditions and NVIDIA's potential impact rather than providing detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"Tout le monde attend que quelqu'un fasse un truc, que quelqu'un annonce quelque chose. Et la tout de suite, ce truc, ce quelqu'un, c'est Nvidia."

1057. Saxo Market Call

Episode: A look ahead at Nvidia earnings and German election
Date: 2025-02-21 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the upcoming NVIDIA earnings report and its significance as a key AI company. The speakers highlight the market's high expectations for NVIDIA and focus on the data center segment and forward guidance.
"It's NVIDIA. That's the big one reporting on Wednesday after the close. The name of names in AI, the whole phenomenon, this incredible stock."

1058. ETF Spotlight

Episode: Investing in the AI Supercycle
Date: 2025-02-25 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the implications of DeepSeq's use of NVIDIA chips and AI infrastructure investments, touching briefly on NVIDIA's role in AI technology and industry impact amidst geopolitical concerns.
"Some experts, in fact, now believe that DeepSeq is using more NVIDIA chips than it has disclosed and probably also spending significantly more than it reported."

1059. Venture Daily

Episode: $100B Question: Can Apple Actually Manufacture in the USA?
Date: 2025-08-07 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions Nvidia in the context of the 'Magnificent Seven' tech companies, highlighting its significant stock price increase and status as the most valuable company ever with a $4 trillion market cap. The discussion situates Nvidia's performance comparatively against other tech giants but does not delve deeply into Jensen Huang's AI strategy, supply chain, or competition.
"So since the last year, 12 months, you got Nvidia on top. They've gone up, I think over 71% in just their stock price. Yeah. They're a $4 trillion market cap. The biggest company, most valuable company in the world ever."

1060. Your Money with Michelle Martin

Episode: Money and Me: Bubble Signs or Smart Moves?
Date: 2025-11-13 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses SoftBank's exit from its NVIDIA investment amid the AI boom, questioning why SoftBank would cash out despite NVIDIA's strong market performance, with some context about AI market dynamics and investment sentiment. There's no direct input from NVIDIA or its executives, but the discussion touches on aspects of AI investment trends relevant to NVIDIA.
"SoftBank is cashing out on one of its most high profile bets. It sold its entire stake in NVIDIA, a position worth more than 7.6 billion US dollars."

1061. Schwab Network

Episode: Ives: Trump Tariffs "Worst Policy Mistake in Last 100 Years"
Date: 2025-04-04 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Dan Ives from Wedbush Securities discusses the impact of tariffs on the tech industry and mentions NVIDIA as a bullish long-term investment despite recent sell-offs and uncertainties related to supply chain and geopolitical risks. The discussion provides a cautious but generally positive outlook on NVIDIA's future.
""You'd buy Nvidia if you have a longer-term time horizon. That continues to be one of the bullish names that will be intact for us.""

1062. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry landscape, highlighting NVIDIA as a fabless manufacturer specializing in designing AI chips but not manufacturing them. It covers supply chain complexities and manufacturing trends without direct insights from NVIDIA or Jensen Huang.
"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabless manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1063. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry landscape, mentioning NVIDIA as part of the fabless manufacturers who design but do not produce chips, highlighting the industry's division between design and manufacturing and U.S. export controls affecting semiconductor supply chains.
"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1064. Bloomberg Talks

Episode: AMD CEO Lisa Su & OpenAI President Greg Brockman Talk New Partnership
Date: 2025-10-07 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: This podcast discusses the AI hardware landscape, highlighting AMD's new partnership with OpenAI while mentioning NVIDIA's established role and challenges in AI model training and inference. It touches on supply chain considerations and the importance of computational power for AI advancements.
"I think that the work that Lisa and team have been doing on the MI450 series, it's looking like it's going to be a really incredible chip."

1065. Bloomberg Talks

Episode: Wedbush's Dan Ives Talks AI Tech Competition
Date: 2025-11-26 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Dan Ives from Wedbush discusses recent AI developments related to NVIDIA, notably the impact of Meta's chip order with Google and Google's TPU, questioning NVIDIA's dominant position but acknowledging the history and scale of competing technologies. The discussion is primarily about NVIDIA's competitive landscape rather than internal company strategy or supply chain details.
"Meta placing a big chip order with Google, further calling into question the position or the dominance position of NVIDIA."

1066. WSJ Minute Briefing

Episode: Trump Says U.S. Will Allow Nvidia H200 Chip Sales to China
Date: 2025-12-09 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses President Trump's announcement permitting Nvidia to export its H200 chips to China, which is positive news for Nvidia amidst export controls. It briefly mentions China's competition but focuses mainly on the trade development affecting Nvidia's market access.
"Shares of Nvidia have jumped off hours after President Trump said he would let the company export its H200 chips to China in an apparent easing of stringent export controls."

1067. Perplexity AI

Episode: Reflection AI's $2B Move to Rival DeepSeek
Date: 2025-10-18 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's investment in Reflection AI, highlighting it as a strategic move aligned with the growth of American open source AI and NVIDIA's role in supplying GPU chips to major AI companies.

"So as far as who's actually investing and putting money in, um, they have Nvidia, of course, why would Nvidia not put money into a $2 billion, uh, you know, an $8 billion company that's taken in $2 billion that inevitably is going to have to spend most of that on Nvidia GPU chips."

1068. Rob Black Show

Episode: Markets Set to Snap Losing Streak
Date: 2025-02-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA mainly in the context of comparing it to Tesla as an AI-related stock, expressing a preference for NVIDIA over Tesla as an investment due to its AI strategy potential. The discussion doesn't include detailed information about NVIDIA's AI strategy, supply chain, or competition but indicates anticipation for NVIDIA's upcoming earnings report.
"So there's two stocks, both AI kind of plays. I'd rather own NVIDIA."

1069. Digital Frontline: Daily China Cyber Intel

Episode: Microsoft, Nvidia Tangled in US-China Cyber Crossfire: Whos Hacking Who?
Date: 2025-08-01 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA's AI chips being cleared for the Chinese market but also highlights regulatory scrutiny from Chinese authorities over alleged backdoors and the impact of U.S. Chip Security Act concerns. It provides a defensive cybersecurity perspective related to NVIDIA and Microsoft products in the context of US-China cyber tensions.
""NVIDIA insists there's no hidden access, but, you guessed it, the narrative on both sides just fuels suspicions and more regulatory headaches from multinationals.""

1070. Morning Brief

Episode: Nvidia CEO unveils new AI endeavors at CES 2026
Date: 2026-01-06 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's CEO Jensen Huang announcing that the Vera Rubin data center processors are in production at the CES 2026 event, alongside AMD's new data center chip launch. The segment focuses more on market reactions and broader economic themes rather than deep insights into NVIDIA's AI strategy, supply chain, or competition.
"Nvidia CEO Jensen Wong announcing its much anticipated Vera Rubin data center processors are in production."

1071. NFRRS Magazines & Periodicals

Episode: Time Magazine
Date: 2025-12-25 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses AI's transformative impact, mentioning NVIDIA as a leading company in AI and quoting Jensen Huang on AI's significance. It touches on the broader implications of AI but only briefly references NVIDIA specifically.
"Jensen Huang, who leads NVIDIA, the world's most valuable company and one of the world's most influential AI leaders, tells time, this is the single most impactful technology of our time."

1072. The Rundown

Episode: Google Makes $32 Billion Acquisition, Tesla's Competitors Reveal New EV Innovations
Date: 2025-03-18 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's AI Developer Conference and praises CEO Jensen Huang's presentation skills, highlighting the event's significance in the AI community. It notes NVIDIA's role in the AI tech landscape but provides only a general overview without deep details on strategy or competition.
"I feel like Jensen is the best onstage performer in tech right now."

1073. MRKT Matrix

Episode: Trade Talks Lift Stocks Higher
Date: 2025-06-09 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly covers NVIDIA CEO Jensen Huang's comments on the company's AI investments in the U.K., highlighting a commitment to building AI supercomputers and supporting AI infrastructure. Huang praises the U.K. as an ideal location for AI innovation and announces new partnerships deploying NVIDIA GPU chips in local data centers.
"NVIDIA CEO Jensen Huang praised the U.K. as the ideal place for AI investment, highlighting its strong AI community and innovative startups like DeepMind and Synthesia."

1074. The Fat Pipe - Most Popular Packet Pushers Pods

Episode: NB544: NVIDIA Buys $5 Billion of Intel Stock; Netskope Rides SASE IPO to an $8.8 Billion Valuation
Date: 2025-09-22 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA primarily in relation to a recent remote code execution vulnerability in one of its AI tools and the company's investment in Intel stock. The discussion touches on cybersecurity concerns and recent news but lacks in-depth commentary on NVIDIA's AI strategy, supply chain, or competition from Jensen Huang.

"There is a remote code execution in an AI tool from NVIDIA."

1075. Marketplace All-in-One

Episode: Bytes: Week in Review - OpenAI's new deal with AMD raises more concerns of AI bubble
Date: 2025-10-10 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses a strategic financial deal between NVIDIA and OpenAI, highlighting NVIDIA's investment of $100 billion into OpenAI enabling OpenAI to lease NVIDIA chips, illustrating a circular dealmaking approach in the AI chip industry.

"NVIDIA agreed to put in $100 billion into OpenAI so that OpenAI can then turn around and lease NVIDIA chips."

1076. Limitless Podcast

Episode: This Week in AI: NVIDIA's $2B Elon Deal | OpenAI's Huge User Base
Date: 2025-10-09 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's significant market position and mentions Jensen Huang's $2 billion investment in XAI, but focuses more on competitor AMD's partnership with OpenAI and related market moves rather than detailing NVIDIA's AI strategy, supply chain, or competition directly from Jensen Huang.

"NVIDIA is well on its way to becoming a $10 trillion company. Jensen Huang announced a $2 billion investment in XAI, putting a massive smile on Elon Musk's face."

1077. Wall Street Wildlife Investing Podcast

Episode: E66: The Ultimate Deep Dive on Nvidia - AI, Innovation & Market Power
Date: 2025-02-11 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features a discussion among investing commentators about NVIDIA's investment thesis and resilience to market changes, touching on AI and innovation but not featuring direct commentary from Jensen Huang.

"This episode really closely interrelates with last week's episode, episode 65. We actually recorded these ones the other way around. So here's our original conversation, like a day before the really big Deep Seek news dropped."

1078. Charles Payne's Unstoppable Prosperity Podcast

Episode: Charles' Take: Disruption in the "Animal Kingdom." Who Is The King Chipmaker?
Date: 2025-08-14 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA in the context of competition with AMD, referencing market whispers about NVIDIA needing to improve its Rubin chip to match AMD's 1450. The conversation includes analogies comparing NVIDIA to a dominant 'great white shark' in the chip industry but expresses skepticism about AMD's challenge. There is anticipation around NVIDIA's upcoming earnings report and recent analyst upgrades.

""Shares of Advanced Micro are coming on really, really strong. And suddenly there are whispers that AMD has made huge strides, significant strides toward the chip king. So much so that reports are saying that Jensen and Company have to go back to the lap with this Rubin chip.""

1079. Markt-Trends setzen mit Swissquote

Episode: NVIDIA kauft 5% Intel | New York to Zurich Taglich
Date: 2025-09-18 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $5 billion investment in Intel, highlighting NVIDIA's strategic move to support Intel amid political pressures and challenges in the chip market. It covers the financial details and context of the investment but does not delve into NVIDIA's AI strategy, supply chain, or direct competition.

"NVIDIA investiert satte 5 Milliarden US-Dollar in den angeschlagenen Rivalen Intel und zwar zum Preis von 23,28 Dollar je Aktie."

1080. The Information's TITV

Episode: Tubi CEO on Streaming Landscape, Google's AI Strategy, Starcloud's Space GPUs | Nov 3, 2025
Date: 2025-11-03 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA chips as part of a significant multi-year deal between AWS and OpenAI, which involves OpenAI running workloads on AWS infrastructure leveraging NVIDIA GPUs. The discussion touches upon NVIDIA's role in supporting

AI cloud computing via AWS but lacks detailed insight into NVIDIA's AI strategy, supply chain, or competition from Jensen Huang or internal perspectives.

"OpenAI will get access to massive compute power via AWS's NVIDIA chips."

1081. AI for Humanity

Episode: The Future of U.S. Chips Starts Now
Date: 2025-09-16 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA CEO Jensen Huang responding to competitor's stance on chip export controls, indicating a focus on innovation rather than export restrictions. There's some discussion on U.S. chip export policies impacting the industry, with NVIDIA being a part of the broader semiconductor strategy context.

"In fact, to the point where NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1082. Basani

Episode: Next Week's Stock Market Outlook: What Traders NEED to Watch
Date: 2026-01-03 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the upcoming CES event featuring NVIDIA and other semiconductor companies unveiling AI-focused GPUs and CPUs, with a brief mention of NVIDIA's CEO Jensen Huang speaking and potential stock movements.

"NVIDIA, okay? CEO, Jensen Hong is scheduled to speak. He's going to be giving out a lot of information. Markets are going to have updates."

1083. Bloomberg Tech

Episode: US Government's Intel Stake Worth $14B After Nvidia Deal
Date: 2025-09-18 | Relevance: 50/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $5 billion investment in Intel and their plan to co-develop chips for PCs and data centers, highlighting potential benefits for Intel's PC products and some access to NVIDIA's data center business. The conversation focuses on the implications for the chip sector and market reactions, but lacks detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"Intel is getting here is basically a stronger PC product. It's going to get access to graphics chips, which can combine with its own. And that'll make it stronger in the market for laptops and desktops."

1084. The Six Five with Patrick Moorhead and Daniel Newman

Episode: The Six Five Pod | EP 270: Silicon Strategies: Intel's 14A Gambit and the Future of Chip Manufacturing
Date: 2025-08-04 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses the growing demand for NVIDIA chips in Europe and China driven by data sovereignty and infrastructure needs, referencing Jensen Huang's indications of large GPU purchase commitments and expanded manufacturing capacity for the H20 chip. The commentary suggests strong market positioning for NVIDIA despite global supply chain and geopolitical challenges.

"We've heard Jensen talk about massive deals in Europe where they were going to buy a ton of Nvidia GPUs because every country in order to stay within the data protection rights that they've created and the privacy rights that they've created will need to have complete control and sovereignty of their infrastructure in the region."

1085. The Intellectual Investor - Value Investing by Vitaliy Katsenelson

Episode: Why Smart Investors Should Sit Out the AI Arms Race - Ep 265
Date: 2025-10-16 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's investment in OpenAI and its position in the AI supply chain, highlighting the complex interplay between NVIDIA, OpenAI, and competitors like AMD. It addresses financial dependencies and the broader AI arms race context but lacks detailed insights on NVIDIA's specific AI strategy or competitive positioning from insiders.

"NVIDIA invested in OpenAI, which will use that money to buy NVIDIA chips. OpenAI also invested in AMD and will be buying AMD chips too."

1086. Was wichtig ist

Episode: Nvidia, der Nokia-Deal und ein Borsenboom: Ist das eine KI-Blase, die platzen wird?
Date: 2025-10-30 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's recent investment deal with Nokia and its position as the world's most valuable company, along with general market sentiments and concerns about a potential AI bubble. It does not include detailed commentary from Jensen Huang or specific insights into Nvidia's AI strategy, supply chain, or competition.

"Nvidia is the company with the largest market value worldwide, more valuable than Tesla, Microsoft, Amazon, and other market stars."

1087. Robotics Industry Insider: AI & Automation News

Episode: Robots Gone Wild: Jensen Huang Drops the Mic as Atlas Humanoids Invade Factory Floors
Date: 2026-02-06 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast highlights NVIDIA CEO Jensen Huang's statement at CES about the transformative impact of AI, marking a 'chat GPT moment' that is advancing robots from labs into manufacturing floors. The discussion situates NVIDIA's AI strategy within the broader robotics and industrial automation landscape, underscoring AI-driven innovations and supply chain impacts.
"NVIDIA CEO Jensen Huang declaring at CES that its chat GPT moment has arrived, propelling robots from labs to factory floors."

1088. AI for Non-Profits

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity, highlighting the strategic importance of the deal and CoreWeave's growth plans as a data center operator.
"Today on the podcast, we're talking about the massive investment deal that NVIDIA has just made. $2 billion is going to go towards CoreWeave, who has a ton of debt, and it's going to help them add 5 gigawatts of AI compute."

1089. The AI News Daily Brief

Episode: South Korea's AI Strategy, California's Policies, and Doximity's Pathway Acquisition
Date: 2025-08-08 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses South Korea's AI initiative, highlighting that NVIDIA GPUs are still a key component in training AI models for South Korean consortia, like SK Telecom. It mentions NVIDIA as a significant technology provider but does not delve into details about NVIDIA's AI strategy, supply chain, or competition from Jensen Huang's perspective.
"Even with this robust infrastructure, the consortia will continue to utilize graphics processing units from NVIDIA, a staple in training AI models."

1090. AI News Tracker

Episode: Title: "AI Industry Shakeup: Major Deals, Hardware Shifts, and Soaring Demand"
Date: 2025-10-20 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast highlights NVIDIA's current market position and the challenges it faces from competitors like AMD and Broadcom, noting a recent decline in NVIDIA's stock price amid increasing competition and supply chain diversification. It contextualizes NVIDIA as the longstanding AI hardware leader currently confronting threats to its dominant market share.
"Meanwhile, NVIDIA, the longstanding AI hardware leader, saw its share price fall 3.5%, as investors weighed these competitive threats to its 95% market share."

1091. Courtside Financial Podcast

Episode: The 500K Survival Line & Why NIO, XPeng, Li Auto Are Ditching NVIDIA
Date: 2026-01-23 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses how Chinese EV companies NIO, XPeng, and Li Auto are choosing to develop their own autonomous driving chips rather than using NVIDIA's chips, framing this as a strategic move for control and cost reasons. It includes analysis of the implications for NVIDIA in the competitive landscape without input from NVIDIA or Jensen Huang directly.
"Second, NIO, XPeng and Li Auto are collectively telling NVIDIA, thanks but no thanks, and going full in-house on their autonomous driving chips. And this isn't just a tech story, this is a statement about control, cost and confidence."

1092. Earn Your Leisure

Episode: The Next Big AI Company Investors NEED to Know About!
Date: 2025-11-26 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA as a central player in the AI revolution likening it to the heart of the AI ecosystem, mentioning its role alongside other companies in the AI supply chain. However, the discussion is somewhat broad and conceptual rather than focusing on Jensen Huang's specific views or detailed AI strategy.
"If I'm looking at what company is the heart of this. Right? That would be easy. You would tell me NVIDIA."

1093. The CCP's Global Ambitions + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor supply chain, citing NVIDIA as a fabless manufacturer involved in chip design but not manufacturing. It touches on the broader market landscape and U.S. export controls affecting advanced chip manufacturing relevant to

companies like NVIDIA.

"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabless manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1094. VerticAI Newshound

Episode: AI morning brief - 2025-02-26
Date: 2025-02-26 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's collaboration with Cisco to integrate AI technologies across enterprises and notes NVIDIA's leading position in AI chips amidst changing market dynamics, but without deep analysis or specific statements from Jensen Huang.

"Next, NVIDIA and Cisco are joining forces to empower AI integration across enterprises. By leveraging NVIDIA's AI chip prowess and Cisco's networking expertise, the partnership aims to streamline AI system deployment, promising enhancements in performance and scalability."

1095. NPR News Now

Episode: NPR News: 01-07-2026 7AM EST
Date: 2026-01-07 | Relevance: 55/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA is mentioned in relation to the Trump administration's reversal allowing the sale of its H200 AI chips to China. Jensen Huang comments on strong Chinese demand and progress on supply chain and licensing issues.

"Speaking at the Consumer Electronics Show in Las Vegas, NVIDIA CEO Jensen Huang says Chinese demand is high, and the company has fired up its H200 supply chain in anticipation."

1096. AI Convo Cast

Episode: Accenture's Claude Training Push, Google's Smart Glasses, and TIME's AI Person of the Year
Date: 2025-12-15 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA's CEO Jensen Huang being named TIME's AI Person of the Year, acknowledging NVIDIA's critical role in AI infrastructure amid the rapid growth of AI adoption globally. The discussion highlights NVIDIA's influence in powering AI but lacks detailed insights on NVIDIA's AI strategy, supply chain, or competition.

""Jensen Huang's prominence in the selection makes sense, given NVIDIA's central role in providing the computational infrastructure that powers virtually all modern AI systems.""

1097. Earn Your Leisure

Episode: Is Intel Making a Comeback? Nvidia's $5 Billion Bet Explained
Date: 2025-09-24 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $5 billion investment in Intel and its strategic purpose as a hedge to maintain NVIDIA's market lead, indicating skepticism about Intel's competitiveness compared to NVIDIA and other chipmakers.

""NVIDIA's business is to make sure that they are operating at the highest level, and one way to do that is to build a moat, and we saw with Elon going to tell Trump, I miss you, and that's sweet.""

1098. El Director - Invertir en Bolsa y finanzas

Episode: Google ACABARA con Nvidia: El exito de los Chips IA de Google
Date: 2025-11-26 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the potential impact of Google competing with NVIDIA in AI chips and reflects on NVIDIA's current market position and concerns, emphasizing future possibilities rather than detailed analysis of NVIDIA's AI strategy or supply chain.

"La propia NVIDIA parece que tiene miedito por ciertas comunicaciones que ha hecho... la bolsa y las cosas no van tanto de lo que ha pasado y lo que ha sido hasta ahora, sino de lo que se piensa o lo que puede ser en el futuro."

1099. F.A.Z. Digitalwirtschaft

Episode: Wenn die KI den Chatbot verlasst
Date: 2026-01-09 | Relevance: 55/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's collaboration with German companies Mercedes-Benz and Siemens at CES 2026, highlighting NVIDIA's role in AI for autonomous driving and industrial applications. Jensen Huang's appearance alongside Siemens' CEO was noted as part of the industrial AI positioning but no direct quotes or in-depth strategy details are provided.

"Siemens hatte eine der groen Keynotes... Nvidia, Jensen Huang war mit ihm auf der Buhne. Und es ging eben um KI."

1100. TechStuff

Episode: TechStuff Redux: Will NVIDIA Save or Ruin The World?
Date: 2025-12-26 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast re-airs a conversation with an author who discusses NVIDIA's CEO Jensen Huang and the company's rise to leadership in AI chip manufacturing. The hosts discuss investing in NVIDIA and its valuation, highlighting its significance in powering future technologies.
"Well, I was just sort of thinking to myself, this is the thing that's going to power everything."

1101. The Peter Zeihan Podcast Series

Episode: Nvidia Purchases $5 Billion of Intel Stock || Peter Zeihan
Date: 2025-09-26 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's $5 billion purchase of Intel stock and explains the semiconductor manufacturing and design process, highlighting Nvidia's role as a design firm partnering with fabs like Intel. It puts the investment into context but does not detail Nvidia's AI strategy, supply chain, or competition.
"Now, NV"

1102. Cteme vam Seznam Zpravy

Episode: Nvidia je prvni firmou, jejiz trzni hodnota dosahla peti bilionu dolaru
Date: 2025-10-30 | Relevance: 50/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's milestone of being the first company to reach a $5 trillion market valuation, emphasizing its leadership in the AI chip market and the significant growth driven by AI technology investments. The mention includes market performance details and contextualizes Nvidia's success within the broader tech industry landscape.
"'Nvidia stoji v cele svetoveho trhu z cipy pro umelou inteligenci AI a vyrazne tezi z prudkeho rustu zajmu o tuto technologii, uvedla agentura Reuters.'"

1103. Stay ahead of the markets with Swissquote

Episode: Nvidia's next big revenue stream could be quantum computing
Date: 2025-06-12 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA and CEO Jensen Huang's optimism regarding European technology and quantum computing companies, linking to potential new revenue streams in quantum computing for NVIDIA. There is no in-depth discussion of NVIDIA's AI strategy, supply chain, or competition, but the company is acknowledged in the context of technology optimism and market prospects.
"Nvidias CEO Jensen Huang feels optimism regarding the European technology and quantum companies."

1104. AI News Daily

Episode: Samsung Targets HBM4 for Nvidia, Upwind Raises 250M for AI Cloud Security, AI Speeds Drug Development, UK Faces AI Job Cuts, and more...
Date: 2026-01-27 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Samsung's plans to supply HBM4 memory chips to NVIDIA for AI accelerators, highlighting the implications for NVIDIA's supply chain and the broader AI memory market dynamics.
"The development could reshape the AI memory supply chain by reducing NVIDIA's single-supplier risk and tightening pricing leverage across the ecosystem."

1105. Breaking News To Trading Moves

Episode: Meta Acquires Manus for Agentic AI Strategy
Date: 2025-12-31 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA as a beneficiary of increased AI compute demand due to agentic AI strategies, highlighting its role as a GPU provider supporting the AI supply chain. It frames NVIDIA positively as part of Meta's broader AI ecosystem benefits.
"So you're looking at NVIDIA, NVDA, and AMD, ticker AMD."

1106. The Silicon Insider

Episode: Google vs. Nvidia in the Chip War: Can Google's TPU Compete?
Date: 2025-11-07 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode discusses Google's emergence as a chip company with its TPU competing against NVIDIA, reflecting on the competitive landscape in AI chips and the impact of supply chain dependencies on technology manufacturing.
"Google may be Nvidia's biggest rival in chips, and now it's upping its game."

1107. FYI - For Your Innovation

Episode: Risks In Bitcoin: Supply Chain And Hardware Centralization
Date: 2025-02-20 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion mentions NVIDIA in the context of semiconductor manufacturing challenges, supply chain complexities, and geopolitical risks, highlighting common industry issues rather than specific NVIDIA strategies. It emphasizes the expensive and lengthy process of chip design and production, referencing NVIDIA among other companies affected.

"we are victims and beneficiaries of the same problem that NVIDIA has and everybody else, right? Because these chips are made in a couple of places. They're very expensive to make."

1108. Bloomberg Intelligence

Episode: Trump China Tariffs Set to Unleash Supply Jolt on US Economy
Date: 2025-04-28 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly discusses Nvidia's pivotal role in the AI trade as a major market driver, referencing ongoing AI investment commitments by key tech companies including Google, Microsoft, Meta, and Amazon. It touches on the AI trade's continued vitality, dispelling doubts about its decline, but does not delve deeply into Nvidia's specific AI strategy, supply chain, or competition.

"I'm going to make a bold prediction that the thing that drove the markets last year clearly was NVIDIA and the AI trade. And this week we're going to get a little bit more information on whether or not the AI trade is dead. And I think the answer is no..."

1109. Global Business

Episode: China welcomes Netherlands' suspension of administrative order regarding Nexperia
Date: 2025-11-20 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's strong quarterly earnings driven by demand for its chips, highlighting a record high revenue and profit, and the positive market reaction to the earnings report. However, there is no detailed discussion of Jensen Huang's views or NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA shares climbed on Wednesday after the company beat quarterly earnings expectations, driven by a surge in demand for its chips."

1110. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor manufacturing landscape and the roles of various companies including NVIDIA as fabless manufacturers, highlighting the complexities of the supply chain and the impact of US export controls on manufacturing and competition. NVIDIA is mentioned as part of a broader industry context rather than focusing on its AI strategy or specific corporate insights.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1111. Audio:Hijacking the Media + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor supply chain, mentioning NVIDIA as a fabless manufacturer specializing in chip research and design, contrasting it with foundry companies like TSMC. The focus is on the broader semiconductor industry and US-China trade controls rather than on NVIDIA's AI strategy or leadership commentary.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1112. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor manufacturing landscape, mentioning NVIDIA as a fabless manufacturer that designs and sells semiconductors but does not fabricate them. It touches on the complexities of the supply chain, U.S. export controls, and the dominance of TSMC in advanced chip production, with only passing reference to NVIDIA's role.

"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabless manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1113. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses semiconductor manufacturing and the role of companies like Nvidia as fabless chip designers, highlighting the global supply chain and manufacturing challenges. While Nvidia is mentioned as a key industry player, there is no direct commentary from Jensen Huang or detailed focus on Nvidia's AI strategy, supply chain, or competition.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabless manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1114. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor manufacturing landscape, highlighting NVIDIA as a fabless manufacturer among others like AMD and Qualcomm. It covers the specialization trend in the semiconductor industry, supply chain complexities, and U.S. export controls impacting advanced chip manufacturing.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1115. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor manufacturing landscape, including Nvidia's role as a fabless manufacturer specializing in chip design but not fabrication. It outlines the supply chain dynamics and U.S. export controls impacting advanced semiconductor manufacturing.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1116. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the broader semiconductor industry landscape, mentioning NVIDIA as a fabless manufacturer in the context of global chip production and supply chain complexities. There is no direct commentary on Jensen Huang or NVIDIA's specific AI strategy or competitive positioning.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1117. FreightCasts

Episode: WHAT THE TRUCK?!? EP871 Will Tariffs Steal Christmas? AV Safety, Simulation, and Supply Chain Showdowns
Date: 2025-08-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the challenges of training autonomous vehicle systems and highlights NVIDIA's simulation system, Gatic Arena and NVIDIA Cosmos, as tools to create high fidelity digital twins and synthetic data for safer, efficient virtual training environments for self-driving systems.

"And so that's why there is such a push towards developing a simulation system that allows for the recreation and the expansion upon real world data that's collected to create in synthetic form, high fidelity down to the sensor level accuracy of what what is happening in the real world, creating those digital twin environments so that we can ultimately evaluate and train our systems in the virtual world to expose the system to those edge cases."

1118. American Thought Leaders

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor industry's manufacturing landscape, mentioning NVIDIA as a fabless manufacturer alongside AMD and Qualcomm, highlighting the industry's specialization between design and fabrication but not focusing in-depth on NVIDIA's AI strategy, supply chain, or competition.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1119. GoodNightCoffee

Episode: ():,OpenAI,
Date: 2026-01-01 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's adjustment of its next-generation product sales strategy, delaying the launch of certain models like the RTX 5070T and a 16GB RTX 5060T version. It notes this as a market-driven decision without official details, impacting market expectations and downstream partners.
"According to CN Beta, graphics processing giant NVIDIA has recently adjusted the sales strategy for its next-generation products, lowering the launch priority of certain plan models."

1120. Audio:Excerpts from How the Specter of Communism Is Ruling Our World + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor industry, mentioning NVIDIA as a fabless manufacturer within the context of U.S.-China competition, manufacturing specialization, and supply chain dynamics, without detailed commentary on NVIDIA's AI strategy or competition.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1121. State Of Mankind - Documentary/TV(Audio) + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor manufacturing landscape, highlighting NVIDIA as a fabless manufacturer alongside AMD and Qualcomm, and elaborates on the complex global supply chain and U.S. export controls affecting chip production and AI technology.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1122. Schwab Network

Episode: Clayton Allison's Top Picks in ETN, NEE & AVGO Amid Historic AI Buildout
Date: 2026-01-27 | Relevance: 50/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the AI infrastructure build-out and references Jensen Huang's statement about it being the largest in history. The conversation mentions Nvidia as a leading AI chipmaker, but the focus is more on the broader infrastructure supply chain rather than Nvidia specifically.
"...ever since Nvidia really came out with their new AI chip the chip makers AMD Nvidia have really been the industry darlings..."

1123. Unsupervised Learning with Jacob Effron

Episode: Ep 78: Jordan Schneider, Host of China Talk, on AI Race, Key Policy Decisions & Unpacking Geopolitical Chip Tension
Date: 2025-12-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses China's AI development efforts, including DeepSeq's use of NVIDIA chips for large language models, illustrating NVIDIA's critical role in AI compute infrastructure globally, especially in China.
"He just like bought a lot of NVIDIA chips before they became impossible to buy."

1124. China Watch

Episode: The US-China AI Race to Dominance
Date: 2025-06-10 | Relevance: 50/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's role in the US-China AI competition, noting that NVIDIA produces the world's most powerful chips and highlighting export controls on advanced chips as a factor slowing Chinese AI development. The discussion includes perspectives on AI data, models, and compute power, with mention of efforts to circumvent export controls.
"In terms of computing power, NVIDIA, which is headquartered in California, has the world's most powerful chips."

1125. On the Record

Episode: On U.S. Economic Security and Competition
Date: 2025-11-21 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses AI technology applications involving NVIDIA, particularly in partnership for wildfire prediction and broader AI uses in communications and space technology. It reflects on the importance of AI as a foundational technology for various sectors, including those NVIDIA is active in.

"We're using AI with our partner, NVIDIA, to figure out an AI way to essentially predict or very quickly identify wildfires before or as soon as they start."

1126. AI News Daily

Episode: Global ChatGPT Outage Shakes AI Industry, OpenAI and Google Cloud Unite, Android 16 Launches on Pixel, Cisco Unveils Secure AI Network, and more...

Date: 2025-06-11 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: Cisco's new AI-driven network architecture includes enhancements made in collaboration with NVIDIA, focusing on validated infrastructure solutions for enterprise AI workflows, indicating strong synergy between the companies in advancing AI infrastructure.

"Cisco is enhancing its collaboration with NVIDIA, concentrating on validated infrastructure solutions that leverage open models."

1127. Digital Frontline: Daily China Cyber Intel

Episode: Nvidia's AI Chips, Diplomat's Email, & a Hacker Nabbed in Italy: Juicy Cyber Goss!

Date: 2025-07-13 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses concerns raised by U.S. senators about NVIDIA CEO Jensen Huang's China business trip, highlighting risks of NVIDIA's AI chips potentially aiding Chinese military or intelligence capabilities amid heightened export controls and supply chain scrutiny.

"Senator Jim Banks and Senator Elizabeth Warren just fired off a pointed letter to NVIDIA CEO Jensen Huang this Friday, warning him about his China business trip and the risks of AI chips getting into the hands of Chinese companies with military or intel ties."

1128. Audio:The Revolt Against God + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump

Date: 2025-05-26 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast discusses U.S. efforts to strengthen AI manufacturing and supply chain resilience, highlighting President Trump's initiatives and noting NVIDIA CEO Jensen Huang's praise of these efforts to boost American technology leadership and manufacturing. The mention touches on NVIDIA's role in national technology ambitions but lacks deep detail on the company's AI strategy or competition.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States."

1129. Tech Brew Ride Home

Episode: Intel Punches Back

Date: 2025-10-09 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast mentions NVIDIA CEO Jensen Huang praising Cursor, an AI enterprise service, highlighting its integration into NVIDIA's engineering processes and referencing investments in AI model developers like Reflection AI.

"NVIDIA CEO Jensen Huang said on CNBC that Cursor is his favorite enterprise AI service and that every NVIDIA engineer is assisted by AI coders."

1130. Tech Update | BNR

Episode: OpenAI-baas Altman haalt uit naar Zuckerberg: 'Probeert ons AI-talent te stelen'

Date: 2025-06-18 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast briefly discusses NVIDIA's role in the gaming chip market versus its competitor AMD, highlighting that Microsoft and Sony are collaborating with AMD for their next gaming consoles while NVIDIA focuses more on AI chips for data centers. The mention includes some context on the competitive positioning but lacks detailed insight.

"Microsoft heeft een deal gesloten met een concurrent van NVIDIA voor de grote volgende spelcomputer-leasemarkt... AMD is eigenlijk ook de geprefereerde leverancier van dat soort chips... NVIDIA heeft eigenlijk ook wel betere dingen te doen, zou je kunnen zeggen. Want die maken vooral AI-chips voor datacenters."

1131. The Exchange

Episode: Intel's Surge, Vaccine Recommendations and Kimmel's Indefinite Suspension 9/18/25

Date: 2025-09-18 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast mentions NVIDIA primarily in the context of a significant $5 billion investment in Intel, highlighting the positive market impact of this collaboration. There is some discussion about the broader tech sector and market conditions but limited detail on NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA announcing a $5 billion investment in Intel. That's putting Intel shares on track for its best day since 1987."

1132. The Fat Pipe - Most Popular Packet Pushers Pods

Episode: 0804 NB537:
Date: 2025-08-04 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA as a key competitor in the AI chip market, highlighting their dominant position similar to Intel's past dominance in desktop chips and noting the challenges competitors face in trying to catch up. The discussion centers around Intel's strategic moves and competition against NVIDIA but does not deeply explore NVIDIA's own AI strategy, supply chain, or competitive tactics.

""Intel is competing against AMD, Qualcomm, and NVIDIA. That's right. You are correct. NVIDIA. And everybody's competing against NVIDIA right now.""

1133. Metamorphose 47

Episode: Qui a fait cette ERREUR a la Bourse ??? (Action Nvidia)
Date: 2025-06-01 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's recent stock performance and financial results, highlighting market reactions and ongoing tariff-related uncertainties impacting the company. The tone is upbeat about Nvidia's potential despite external challenges.

"C'est le PDG d'NVIDIA qui l'a dit ! Il y a des trillions a se faire !"

1134. Guillaume t'explique

Episode: #3 - l'Hitoire DINGUE de Jensen Huang et Nvidia!
Date: 2025-09-28 | Relevance: 60/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast episode narrates the inspirational story of Jensen Huang, founder and CEO of Nvidia, highlighting his early life struggles and the founding and development of Nvidia as a pioneering GPU company. It mentions the company's early products and Huang's strategic focus on GPUs over CPUs, emphasizing Nvidia's significance in gaming and beyond.

"Cet homme s'appelle Jensen Huang et voici comment il est devenu une des personnes les plus influentes de cette planete."

1135. TechLinked

Episode: Intel could make Nvidia GPUs, Big AI roundup + more!
Date: 2025-03-27 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the rumor of Intel possibly manufacturing Nvidia gaming GPUs and the potential strategic implications of such a partnership, especially in the context of tariffs and supply chain issues.

"Intel is reportedly working to finalize commitments from Nvidia to have Team Blue's Foundry division manufacture Team Green's gaming GPUs, an eerily perfect setup for the tech industry version of the Red Wedding from Game of Thrones."

1136. The Amazing AI News

Episode: "AI Revolution. Nvidia Opportunity. Capital Controversy. "
Date: 2025-02-23 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast highlights Nvidia as a smart buy due to the debut of the Blackwell AI chip and predicted earnings growth, but the discussion lacks direct input from Jensen Huang and is primarily from an outsider perspective. It presents Nvidia positively in the context of AI chip leadership and investment potential.

"Emerging evidence suggests Nvidia as a smart buy before Feb. 26, Here's why. The debut of Blackwell, a significant advancement in AI chips, alongside predictions of a 20% earnings surge, underpin this sentiment."

1137. The Joe Rogan Experience

Episode: #2422 - Jensen Huang
Date: 2025-12-03 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast excerpt discusses NVIDIA as a 'national treasure' with a focus on U.S. manufacturing and national security, emphasizing support from the U.S. administration for onshore production of critical technology in America. There is no direct discussion of Jensen Huang's AI strategy, supply chain, or competition, but some praise for NVIDIA's importance to national interests is noted.

""I just want to let you know that you're a national treasure. NVIDIA is a national treasure. And whenever you need access to the president, the administration, you call us, we're always going to be available to you.""

1138. Global Macro Update

Episode: FOMO Is Not an Investing Strategy
Date: 2026-01-16 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The speaker discusses NVIDIA's contribution to the S&P 500 returns in 2025, highlighting its position as the largest contributor due to its market cap but noting that many other stocks outperformed it in terms of price performance. The mention reflects on investor

perceptions of NVIDIA within the MAG7 group but does not delve into NVIDIA's AI strategy, supply chain, or competitive positioning.

"NVIDIA, number one contributor to S&P returns, 75th best performer in the S&P 500. So 74 stocks outperformed NVIDIA, even though it was the largest contributor."

1139. AI Replaced Me

Episode: Ep. 24 - Front Door Strategy
Date: 2025-10-18 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the physical infrastructure of the AI economy, mentioning NVIDIA's Blackwell wafer and associated supply chain aspects like power engineering and data center construction. It also touches on the broader AI impact on work roles, highlighting some supply chain and technology integration aspects related to NVIDIA's AI hardware.

"NVIDIA and TSMC surfaced a US-made Blackwell wafer from Phoenix."

1140. The Six Five with Patrick Moorhead and Daniel Newman

Episode: EP 276: Decoding Tech Giants: From Apple's Pivot to Oracle's AI Surge
Date: 2025-09-15 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion touches on the GPU market where a single company dominates, with mentions of NVIDIA and AMD platforms being commonly used for AI across enterprises, and the growing market for XPUs. There is no direct quote from Jensen Huang, nor explicit commentary on NVIDIA's AI strategy, supply chain, or competition details.

"A lot of them are going to do it on NVIDIA or an AMD on a platform like that."

1141. The Deep Dive with Andre

Episode: Rare Earths: Geopolitics, Chokepoints, and Supply Chain Resilience
Date: 2025-06-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the critical role of rare earth elements in technologies including NVIDIA's GPUs, highlighting their reliance on these materials for AI and high-performance computing. However, it does not delve deeply into NVIDIA's AI strategy, supply chain specifics, or competitive positioning.

"High performance computing, AI. Companies like NVIDIA, their GPUs rely heavily on materials derived from or process using REs."

1142. The Trivium China Podcast

Episode: Ep 35 - How much dependence on China is too much?
Date: 2025-08-23 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the challenges around export controls and smuggling of NVIDIA chips between the U.S. and China, touching on the effectiveness of such controls and the ongoing cat and mouse game in chip geopolitics. It does not directly address NVIDIA's AI strategy or competition but highlights supply chain and export issues relevant to the company.

"We're also reading stories about the smuggling of NVIDIA chips and other, you know, high-end chips into China because their export control is the other way."

1143. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry's manufacturing landscape, including NVIDIA's role as a fabless semiconductor company specializing in chip design rather than manufacturing. It highlights the dominance of Taiwan Semiconductor Manufacturing Company (TSMC) in producing advanced AI chips, which NVIDIA depends on for fabrication.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1144. Audio:How the Specter of Communism Is Ruling Our World + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion outlines the semiconductor manufacturing landscape, including NVIDIA's role as a fabless manufacturer specializing in chip design rather than fabrication. It notes the supply chain complexities amid U.S-China tensions and export controls impacting advanced chip production, indirectly referencing NVIDIA's strategic position.

"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1145. Schwab Network

Episode: "Nothing's Going to Kill Nvidia," Competition to Impact NVDA Margins
Date: 2026-01-02 | Relevance: 60/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses Nvidia's stock performance and its pivotal role in the tech sector, especially in relation to AI-driven capital expenditure and market growth. The commentary mentions upcoming catalysts like CES and Samsung news but lacks direct quotes from Jensen Huang or detailed analysis of NVIDIA's AI strategy, supply chain, or competition.

"The reason that Nvidia is so important is because it's been propping up the market. Yeah. It's been the story behind the CapEx AI, which has been propping up GDP."

1146. Uncanny Valley | WIRED

Episode: AMD CEO Lisa Su Isn't Afraid of the Competition
Date: 2025-12-11 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast features a discussion about AMD's CEO Lisa Su, with a comparison to NVIDIA's market position and strategy in AI GPUs. NVIDIA is acknowledged as a dominant company in the AI GPU market, recognized for smartly anticipating the AI revolution and pivoting focus accordingly.

"And NVIDIA is, you know, a $4 trillion company now. And it's a company that's widely recognized as having smartly foreseen the AI revolution and pivoted its business to focus on AI GPUs."

1147. Rich On Tech AI

Episode: America's Semiconductor Drive: Hype or Reality?
Date: 2025-09-16 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly discusses recent industry and regulatory developments impacting NVIDIA, including a mention of CEO Jensen Huang responding to competition and export control debates, but does not provide an in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.

"Nvidia CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1148. The Circuit

Episode: Ep 144: AMD Financial Analyst Day, Neoclouds earnings - REITS or Neoclouds?
Date: 2025-11-18 | Relevance: 45/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's potential revenue growth compared to AMD and market expectations related to NVIDIA's GPU sales and future market share projections. However, it is not an in-depth discussion specifically about NVIDIA's AI strategy, supply chain, or competitive positioning.

"It's just a stark difference. Right. So I think, I think that's the thing. And I think people did hope they would talk a little bit more about a new customer, which none of us expected, but I thought they were hoping something like, you know, a new customer announcement..."

1149. Perspectives with Wenchi Yu

Episode: Ep. 2 DeepSeek, Chip Export Control Policy, US-China AI Competition, Energy Demand of AI, Interview with Kevin Xu
Date: 2025-02-07 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast mentions a significant stock value drop for NVIDIA following the rise of Chinese AI startup DeepSeek, highlighting concerns about US-China AI competition and export control impacts. However, there is no direct discussion from Jensen Huang or in-depth analysis of NVIDIA's AI strategy, supply chain, or competition.

"The news sent shockwaves through the tech industry, triggering a stock row for NVIDIA, which lost $600 billion in value overnight."

1150. A Podcast About AI

Episode: Reflection AI Raises $2B to Challenge DeepSeek from the U.S.
Date: 2025-10-18 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's investment in a $2 billion funding round for Reflection AI, highlighting the strategic importance of NVIDIA GPU chips in AI development and the company's role in supporting U.S. dominance in open source AI models.

"As far as who's actually investing and putting money in, they have NVIDIA, of course. Why would NVIDIA not put money into a $2 billion, you know, an $8 billion company that's taken in $2 billion that inevitably is going to have to spend most of that on NVIDIA GPU chips."

1151. The Jaeden Schafer Podcast: Inspired by Joe Rogan, Lex Fridman, Tucker Carlson

Episode: Cohere Raises $100M at $7B Valuation, Partners with AMD
Date: 2025-09-27 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a recent $100 million funding round for AI company Cohere, highlighting its partnership with AMD, a competitor to NVIDIA. It mentions NVIDIA's $100 billion investment in OpenAI but mainly focuses on the competitive dynamics between AMD and NVIDIA in the AI GPU space.

"Of course, OpenAI just got a $100 billion investment from NVIDIA."

1152. Steven AI Talk

Episode: AI Model Competition, Transparency, and Enterprise Adoption
Date: 2025-12-13 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses transparency trends in AI model development, citing NVIDIA among B2B players who are increasing transparency due to enterprise demands, contrasting with B2C models which are becoming more opaque. It highlights the strategic choices related to disclosure and the importance of trust and transparency for enterprise clients using NVIDIA's AI infrastructure.

"You have B2B players like IBM, AWS, NVIDIA. They're getting more transparent. Because they have to. Their enterprise clients demand that visibility."

1153. Stockdays

Episode: INTEL DEEP DIVE: What Went Wrong?
Date: 2025-02-15 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA as the dominant player in the AI and GPU markets, highlighting its leadership position compared to Intel. However, the mention is brief and part of a broader conversation about Intel's challenges rather than an in-depth discussion about NVIDIA's AI strategy or supply chain.

"And who's dominating those areas? NVIDIA. They're like the undisputed king of AI chips."

1154. The Quantum AI Digest

Episode: The Quantum AI Digest: 9 August 2025 Daily Dispatch
Date: 2025-08-09 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of Tesla's pivot to relying on partners like NVIDIA and Samsung for its Robotaxi initiative, and highlights NVIDIA's new hardware achieving high AI inference rates as presented at the SIGGRAPH conference.

"Tesla will now rely on partners like NVIDIA and Samsung to pursue its Robotaxi goals."

1155. AI News Daily

Episode: OpenAI Data Breach Exposes User Info, Baidu Cuts Jobs Amid AI Slump, Nomura Teams with OpenAI for AI Asset Shakeup, AI Cuts Emissions with Turbine Ducts, and more...
Date: 2025-11-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly touches on a GPU as a service offering powered by NVIDIA-grade accelerators, highlighting its role in addressing GPU access amid shortages and costs, and its applications in various AI domains. However, there is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competitive positioning.

"A key feature is GPU as a service, letting organizations rent NVIDIA-grade accelerators on demand instead of buying hardware, addressing GPU access amid global shortages and high import costs."

1156. AI News Daily - Your Daily AI Briefing in 5 Minutes

Episode: AI Update. Meta's GenAI. Tencent's 3D AI. AI Millionaires.
Date: 2025-07-29 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's optimistic prediction about AI creating numerous millionaires in the next five years, emphasizing AI's democratizing potential and the future business models involving AI development within companies. However, it does not directly address NVIDIA's AI strategy, supply chain, or competition in detail.

"AI will create more millionaires in just five years than the Internet did in two decades."

1157. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: The Open Source AI Model Beating GPT-5 on Agents
Date: 2025-11-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses CoreWeave's financial performance with a focus on NVIDIA's H100 GPUs, indicating strong demand and value retention for NVIDIA hardware, alongside a mention of NVIDIA's stock rally. There is no direct commentary from Jensen Huang on NVIDIA's AI strategy, supply chain, or competition.

"CoreWeave announced that their first H100 contract was reaching expiry and was re-signed within 5% of the original price. In other words, at the moment at least, it looks like the scarcity of compute is trumping all other factors in the current market."

1158. Audio:Nine Commenteries on the Communist Party + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses U.S. trade policies and manufacturing with a passing mention of NVIDIA in the context of the president's AI and manufacturing initiatives. It references NVIDIA CEO Jensen Huang praising efforts to boost American technology and supply chain resilience.
"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States, he said at a May 24th Swedish event."

1159. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses U.S. government initiatives to bolster AI manufacturing and highlights a recent supportive comment from NVIDIA CEO Jensen Huang regarding American technology and supply chain resilience. The mention of NVIDIA is within the context of national AI strategy and supply chain security.
"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States."

1160. AI with Shaily

Episode: AMD and OpenAI Join Forces: A Game-Changer for AI Infrastructure
Date: 2025-10-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses AMD's major partnership with OpenAI and mentions NVIDIA's CEO Jensen Huang acknowledging the changing AI hardware landscape and the emergence of a multi-vendor ecosystem including NVIDIA's OpenAI partnership via Microsoft Azure.
"NVIDIA's CEO Jensen Huang acknowledges the changing landscape and highlights his company's own partnership with OpenAI via Microsoft Azure."

1161. Na Radarze

Episode: Upadek giganta - jak Intel straci przewage w erze AI | Jamal Szpalerski
Date: 2025-08-23 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Intel's decline and its competition with companies like Nvidia and AMD. Nvidia is mentioned as a top-valued company in the U.S. stock market, reaching a 4 trillion dollar valuation, signaling its strong market position compared to Intel's struggles.
""Dwiema najwyzej notowanymi spokami na giedzie amerykanskiej sa Nvidia, ktora jako pierwsza spoka w historii osiagnea puap 4 bilionow dolarow. I niedawno Microsoft dogoni rowniez Nvidia, 4 biliony dolarow.""

1162. Tech&Co, la quotidienne

Episode: Robotaxis : Waymo leve 16 milliards de dollars - 04/02
Date: 2026-02-04 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly compares AMD and Intel's recent results and strategies with NVIDIA's position in the GPU market, noting NVIDIA's dominance and the challenges competitors face. There is no direct comment from Jensen Huang or in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.
"Aujourd'hui, Nvidia a plie le jeu en termes de GPU."

1163. Haftalk Gundem Degerlendirmesi

Episode: Haftalk Gundem Degerlendirmesi #769
Date: 2026-01-24 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the upcoming Nvidia ARM-based laptop processors, mentioning models N1 and N1X made with TSMC 3nm technology expected to launch around March and Computex, potentially invigorating the ARM Windows laptop market. It notes competition with Qualcomm and the growing market but doesn't deeply analyze Nvidia's AI strategy, supply chain, or competition.
"Gecen haftalarda da bir iki laf gecen Nvidia'nn dizustu bilgisayar islemcileri. Bu sene gelecekler gozukuyor. Bunlar ARM mimarisinde islemciler."

1164. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor manufacturing landscape, mentioning NVIDIA as a fabless manufacturer and its role in chip design within the broader industry context, but does not delve into specifics about NVIDIA's AI strategy, supply chain, or competition. It focuses more on industry structure and manufacturing geographic distribution, including U.S. export controls affecting semiconductor production.

"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fables manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1165. AI for Non-Profits

Episode: Cohere's Strategy with AMD Revealed
Date: 2025-10-14 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's role in the AI industry mainly by mentioning its investment in OpenAI and contrasts NVIDIA with AMD in the context of partnerships with AI startups like Cohere.

"OpenAI just got a $100 billion investment from NVIDIA."

1166. Stock Movers

Episode: Nvidia H200 Chips; GE Vernova Rises After Boosting Buyback; Palantir Deal with US Navy
Date: 2025-12-10 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Nvidia in the context of recent developments allowing Chinese tech companies to potentially order Nvidia's new AI chip, the H200, which is significantly more powerful than previous models. However, there's limited excitement in the market as Chinese government approval is still pending, and the stock shows only slight gains.

"We had some reporting from Reuters stating that ByteDance and Alibaba are keen to make some pretty large orders in the Nvidia H200 chip that Trump said yesterday what he would allow to be exported into the Chinese market."

1167. The Pie: An Economics Podcast

Episode: Between a Chip and a Hard Place: The Economics of Security and Sovereignty in Taiwan
Date: 2025-05-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses potential cost implications for NVIDIA due to higher operating costs at U.S.-based TSMC fabs, and the uncertain impact on NVIDIA's profitability and R&D investment potential. The discussion is speculative without specific details on NVIDIA's strategy.

"If TSMC follows through in terms of building up their fabs in the U.S., I think the evidence that we have is that the fabs that it has in the U.S. cost them more to operate relative to its fabs in Taiwan... And who are their customers? Well, they're leading customers, a company like Apple and NVIDIA and Meta."

1168. CSAIL Alliances Podcasts

Episode: The Promise and Peril of Computer Chips with Tufts Professor Chris Miller
Date: 2025-07-07 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion provides an overview of the semiconductor industry's structure, highlighting NVIDIA as a US-based chip design company that relies on Asian manufacturers, particularly in Taiwan. It touches on the supply chain specialization and geopolitical risks but does not directly address NVIDIA's AI strategy or competition.

"Companies like NVIDIA, AMD, Qualcomm, they do nothing but design chips. They don't manufacture anything today."

1169. Squawk on the Street

Episode: Exclusive with Nvidia CEO Huang and Synopsys CEO, December Playbook 12/1/25
Date: 2025-12-01 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast includes a brief discussion about Nvidia's AI news and its $2 billion stake in chip design software provider Synopsys, with some contextual remarks on AI market dynamics and competitor relationships. However, there's no detailed discussion of Jensen Huang's comments on NVIDIA's AI strategy, supply chain, or competition within the provided transcript excerpt.

"Another AI deal, Nvidia taking a $2 billion stake in chip design software provider Synopsys."

1170. Investing Experts

Episode: DeepSeek isn't new, Nvidia concerns, downgrading AMD + 3 semi caps
Date: 2025-02-13 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses Nvidia mainly in the context of the market reaction to competition from a Chinese startup DeepSeek and concerns about Nvidia's stock price dropping significantly. There is also a brief comparison to AMD's struggles in the AI GPU market, but limited direct discussion on Nvidia's AI strategy, supply chain, or competition specifically from Jensen Huang.

"NVIDIA close 17 percent lower and all these AI names, you know, sell off throughout the day because there's all this"

1171. This Week in News

Episode: The U.S. Chip Comeback: Can It Succeed?
Date: 2025-08-29 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mention includes a reference to NVIDIA CEO Jensen Huang responding to a competitor's stance on chip export controls, highlighting some industry dynamics and trade restrictions affecting AI chip exports but does not deeply discuss NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA CEO Jensen Huang kind of called [Dario Amadeo] out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1172. Becker Private Equity & Business Podcast

Episode: The Tortoise or the Hare: Microsoft, Apple, & NVIDIA 5-3-25
Date: 2025-05-03 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's recent rise in market capitalization, comparing it to Microsoft and Apple, and attributes NVIDIA's success to its timely positioning in the AI revolution. The discussion characterizes NVIDIA as a quickly rising company, somewhat like the hare in the tortoise and hare analogy, but acknowledges its long-term efforts.

""NVIDIA, which I think it was the hare, although it's unreally fair to call Jensen-Wang and NVIDIA the hare, given the long, long time they've been in the business and how hard they've worked to build their business, but they have the timing right with the AI revolution and so forth.""

1173. Fareed Zakaria GPS

Episode: The Trump-Putin Rift Widens
Date: 2025-07-14 | Relevance: 50/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly introduces Jensen Huang, NVIDIA's CEO, mentioning the company's milestone of becoming a $4 trillion company largely due to its role in AI chip technology. It hints at a forthcoming discussion about AI, US-China relations, and technology's impact but does not provide detailed insights in the provided excerpt.

"On Wednesday, NVIDIA became the world's first $4 trillion company. Much of that value comes from its chips, which form the backbone of artificial intelligence."

1174. Pandemic Quotables (Audio) + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the broader semiconductor manufacturing landscape, highlighting NVIDIA as a fabless manufacturer specializing in chip design but not fabrication. It touches on supply chain dynamics and U.S. export controls impacting the semiconductor industry, indirectly relevant to NVIDIA's strategic context.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1175. The Six Five with Patrick Moorhead and Daniel Newman

Episode: EP 283: Mag 7 Earnings: Meta's Capex, AWS Comeback, NVIDIA GTC 2025, and Apple's iPhone Miss
Date: 2025-11-03 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast features a discussion mentioning NVIDIA's market valuation in relation to other companies like OpenAI and Meta, along with references to venture capital investments in NVIDIA. However, there is no direct discussion of Jensen Huang's AI strategy, supply chain, or competition.

"Brad and altimeter has a very, hardcore investment into Nvidia, uh, among other public companies."

1176. Moon Money

Episode: The AI Bubble Will NOT POP || Dan Ives WILD Stock Market Prediction
Date: 2025-12-02 | Relevance: 50/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA in the context of AI's role in the market, mentioning Jensen Huang's influence on the company's stock and the broader AI revolution impacting the semiconductor industry. It highlights NVIDIA among top tech stocks benefiting from AI but provides limited direct insight into NVIDIA's AI strategy, supply chain, or competition.
"How much is Dell swung around by just how much of an allocation Michael Dell gets from Jensen Huang at NVIDIA? Because AI is so much the story of why the stock has gone up."

1177. Becker Private Equity & Business Podcast

Episode: Apple, NVIDIA & Palatnir 3-22-25
Date: 2025-03-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's market capitalization in comparison to Apple and Palantnir, noting NVIDIA's position as the second-largest market cap and its year-to-date decline with a recent rebound. The discussion is general and does not delve into NVIDIA's AI strategy, supply chain, or competition.
""NVIDIA is number two in market cap at about 2.8 trillion, but it's also down year to date. Now about 13% or so, 12.3% or so year to date, but some rebound lately.""

1178. Stock Movers

Episode: Nvidia, Tesla and Intel
Date: 2025-09-15 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's share price drop due to China's preliminary anti-monopoly probe related to its Mellanox acquisition, highlighting ongoing US-China trade tensions and challenges for NVIDIA's business outlook in China.
"NVIDIA shares are down by about 1% after China said its preliminary probe found that NVIDIA violated an anti-monopoly law with its acquisition of Mellanox technologies."

1179. TechCheck

Episode: 100 days in, cracks showing in Trump, tech relationship 04/29/25
Date: 2025-04-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses CEO Jensen Huang's efforts to navigate political and trade tensions amid the Trump administration's policies affecting NVIDIA, including tariffs and export bans, but only briefly touches on these topics without deep detail.
"Now, another signal came earlier this month when NVIDIA CEO Jensen Huang made a surprise trip to Beijing to reassure officials and clients amid the tariffs and the export ban."

1180. Rob Black Show

Episode: Strategy Show Highlighting Trends
Date: 2025-08-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA as part of the Magnificent Seven tech companies, highlighting its 171% surge in 2024 driven by AI chip demand, indicating strong market performance linked to AI investment.
"NVIDIA surged 171% in 2024, riding AI chip demand."

1181. Rob Black Show

Episode: Strategy Show Highlighting Trends
Date: 2025-08-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA as part of the 'Magnificent Seven' stocks that performed strongly due to AI chip demand, highlighting its 171% surge in 2024. However, the discussion is high-level, focusing on investment returns rather than detailed AI strategy, supply chain, or competition.
"NVIDIA surged 171% in 2024, riding AI chip demand."

1182. The Jaeden Schafer Podcast: Inspired by Joe Rogan, Lex Fridman, Tucker Carlson

Episode: Understanding Trump's AI Strategy
Date: 2025-07-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions that the Trump administration pulled back restrictions allowing NVIDIA to sell AI chips globally, including to China, highlighting a regulatory context affecting NVIDIA's AI chip sales but without detailed discussion of the company's strategy, supply chain, or competition.
"He pulled back a bunch of restrictions for NVIDIA to sell AI chips around the globe, basically to China."

1183. The Information's TITV

Episode: EA's $55B Buyout, Snowflake's AI Data Strategy, Humanoid Robots Learning Dexterity | Sep 29, 2025
Date: 2025-09-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast segment makes a moderate mention of NVIDIA's AI ecosystem investments, including OpenAI, highlighting the scale of NVIDIA's influence in the AI industry without detailed discussion of strategy or competition.

"We are then going to take a step back and look at the scale of power that NVIDIA has amassed with its investments, not just into OpenAI, but also so many other pockets of the AI ecosystem."

1184. Rob Black Show

Episode: First Friday Strategy Show For 2026
Date: 2026-01-16 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the broader AI trade and semiconductor market, including a mention of NVIDIA as part of companies benefiting from Taiwanese government investment in semiconductor and AI capacity, but lacks detailed discussion on NVIDIA's AI strategy or competitive positioning.

"NVIDIA AMD Applied Materials Broadcom, these AI companies rallied yesterday on the news coming out of Taiwan Semiconductor, where they had a solid beat on earnings, and they said the AI trade's real."

1185. Supply Chain Now

Episode: Navigating Global Logistics: Supply Chain Strategies & Leadership Lessons with Jeffrey Shih
Date: 2025-04-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode mentions NVIDIA in the context of AI servers being manufactured primarily in Taiwan, highlighting the importance of Taiwan's semiconductor and electronics supply chain. It discusses broader supply chain shifts involving semiconductor companies like TSMC but provides only a brief mention of NVIDIA without specific strategic insights.

"So that's the importance of the Taiwan position in the supply chain management of semiconductors as well as electronics... You see the NVIDIA. All the investment of the server actually is from those countries manufactured from Taiwan."

1186. Supply Chain Now

Episode: The Buzz: The Importance of Generative AI in Today's Business
Date: 2025-06-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the importance of adopting AI technologies, mentioning NVIDIA among leading AI experts and emphasizing the competitive necessity of starting AI processes immediately. However, little specific detail about NVIDIA's AI strategy, supply chain, or competition is provided.

"Secondly, Laura and I were just recently at the Georgia Tech AI Fest, brought in the world's foremost experts on AI, where it's going, NVIDIA, you know, academia, just the top minds in the world."

1187. The HC Commodities Podcast

Episode: Chip War: How semi-conductors became the new oil with Chris Miller (Summer Repeat)
Date: 2025-08-05 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor industry value chain, highlighting NVIDIA's role as a chip design company that does not manufacture chips, amidst the broader context of manufacturing complexity and industry oligopolies.

"Companies like NVIDIA only design chips. Manufacture nothing. Just do the design."

1188. China Watch

Episode: The Kinetic War Hedge-Explaining the Government Acquisition of Stakes in Intel
Date: 2025-09-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the chip supply chain, noting NVIDIA as a key player in chip design but focuses more broadly on supply chain risks related to Taiwan and Intel's integrated device manufacturing model as a strategic U.S. asset. There is no direct commentary on NVIDIA's AI strategy or competition.

"Most of the U.S. chip companies, such as NVIDIA, AMD, and Apple, have been focusing on the first step, design."

1189. Next-Gen Tech: Innovate or Die

Episode: Next Generation Tech in 2025: AI, Data Centers, and Smart Devices Revolutionize Global Industries and Innovation
Date: 2025-10-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions a recent deal between OpenAI and NVIDIA involving a significant deployment of NVIDIA systems for AI infrastructure, along with NVIDIA's large investments as the AI industry scales. However, it does not include direct commentary from Jensen Huang or an in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.

"OpenAI and NVIDIA recently inked a deal that will see OpenAI deploy at least 10 gigawatts of NVIDIA systems for its Next-Gen AI infrastructure, with NVIDIA investing up to $100 billion as each gigawatt comes online."

1190. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor industry landscape focusing on manufacturing locations, companies like TSMC, AMD, Nvidia, and Qualcomm, and the impact of US export controls on chip manufacturing. It mentions Nvidia as a 'fabless' semiconductor company but does not provide details on Jensen Huang's statements or Nvidia's AI strategy, supply chain, or competition.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as FABL's manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1191. The CCP's Global Ambitions + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses semiconductor manufacturing globally, mentioning NVIDIA as an example of a fabless semiconductor company that designs but does not manufacture chips. It touches on U.S. efforts to bring manufacturing back and export controls affecting the supply chain but does not focus on NVIDIA's AI strategy, supply chain specifics, or competition.
"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabless manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1192. Trending Unpacked

Episode: AMD Stock: How AI Chips Are Powering the Next Tech Boom
Date: 2025-10-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses the rivalry between AMD and NVIDIA in the AI chip market, focusing mainly on AMD's recent performance and its potential to challenge NVIDIA's dominance. However, it does not present detailed insights into NVIDIA's AI strategy, supply chain, or comments from Jensen Huang.
"NVIDIA, the giant in the room, the company that seemed untouchable in AI hardware."

1193. The AI Podcast

Episode: Cohere and AMD Take on AI Giants
Date: 2025-09-27 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA primarily in the context of its $100 billion investment in OpenAI, highlighting NVIDIA's role as a key player in the AI GPU market. The discussion contrasts NVIDIA's involvement with competitors like AMD and enterprise AI startups such as Cohere, noting partnerships and investments related to AI model GPU support.
"Of course, OpenAI just got a $100 billion investment from NVIDIA."

1194. Let Freedom: Political News, Un-Biased, Lex Fridman, Joe Rogan, CNN, Fox News

Episode: Cohere Raises $100M, Partners with AMD for AI Growth
Date: 2025-09-27 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA primarily in the context of its $100 billion investment in OpenAI, highlighting its role as a major investor in AI startups. It contrasts NVIDIA with AMD, noting that Cohere recently partnered with AMD to run their AI models on AMD's GPUs, implying competitive dynamics between NVIDIA and AMD in the AI hardware space.
"Of course, OpenAI just got a $100 billion investment from NVIDIA."

1195. Bloomberg Tech

Episode: Elon Musk Sues Apple, US Takes Intel Stake
Date: 2025-08-25 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions Nvidia as a potential future buyer of Intel's chips and notes analyst optimism about Nvidia's upcoming earnings report, expecting significant revenue growth. However, there is no direct mention of Jensen Huang or detailed discussion of Nvidia's AI strategy, supply chain, or competition.
"Now Nvidia potentially could be a future buyer of Intel's made chips but all eyes are on Nvidia more importantly for its earnings coming out Wednesday when the investors seeing it as a key test of broader AI impact and demand."

1196. The Mark Cuban Podcast

Episode: DeepSeek's New Rival? Reflection AI Raises $2B in the U.S.
Date: 2025-10-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's investment in the open source AI company Reflection AI, highlighting NVIDIA's strategic move to support AI development through GPU sales and participation in a major funding round. It situates NVIDIA among key investors backing this initiative in the competitive AI landscape but offers limited details on NVIDIA's AI strategy, supply chain, or competition directly from Jensen Huang.

"As far as who's actually investing and putting money in, they have NVIDIA, of course. Why would NVIDIA not put money into a $2 billion, you know, an $8 billion company that's taken in $2 billion that inevitably is going to have to spend most of that on NVIDIA GPU chips."

1197. AI News Tracker

Episode: "AI Transformation Accelerates: Landmark Partnerships, Product Launches, and Intensified Competition"
Date: 2025-10-15 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode covers broad AI industry developments including NVIDIA's planned $100 billion investment in partnerships and data centers with OpenAI, reflecting NVIDIA's strategic role in AI infrastructure expansion amid increasing competition and innovation.

"NVIDIA plans a $100 billion investment in OpenAI partnerships and data centers."

1198. TraderMerlin

Episode: AMD vs. Nvidia - Is AMD's New Chip a Game-Changer or Just Chasing Shadows? - 06/12/25
Date: 2025-06-12 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses AMD's new chip and its potential to compete with Nvidia, affirming Nvidia's dominant position in the market but noting the need for competitors to innovate or undercut prices. It includes some technical analysis on stock trends but lacks direct commentary from Nvidia executives or deep insights into Nvidia's AI strategy, supply chain, or competition.

""Nvidia is the king, right? They're absolutely dominant and for someone to break into that market, they're going to have to do something unique or offer a different service or maybe something that's extremely much, much, much cheaper and take away some of those profit margins from Nvidia.""

1199. (Audio)NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA in the context of U.S. efforts to boost AI manufacturing and highlights CEO Jensen Huang's praise of the administration's initiatives to strengthen U.S. technology supply chains and manufacturing resilience.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States, he said at a May 24th Swedish event. Manufacturing in the United States, securing our supply chain, having real resilience, redundancy, and diversity in our manufacturing supply chain, all of that is excellent."

1200. Dragon's Code: America Under Cyber Siege

Episode: Dragon's Code: China Hacks America! NSA Secrets, Spy Games, and Cyber Showdowns
Date: 2025-10-12 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: Jensen Huang of NVIDIA is mentioned in the context of US-China technology competition in semiconductor and AI hardware, highlighting the importance of export policies and the need for a coordinated defensive approach against cyber threats involving supply chain risks. The discussion references Huang sounding the alarm about narrowing technological gaps between the US and China and double-edged consequences of export bans.

"Cyber pros, like NVIDIA's Jensen Huang, are sounding the alarm too. He said on the BG2 tech podcast that the gap in semiconductor and AI hardware between the US and China is now down to just nanoseconds, warning decisions about export bans are double-edged swords."

1201. AI Convo Cast

Episode: Apple Brings Google Gemini to Siri and Nvidia Bets Big on Drug Discovery with Eli Lilly
Date: 2026-01-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses NVIDIA's significant partnership with Eli Lilly in drug discovery and NVIDIA's response to questions about chip payment terms amid China tensions, though details are limited. Most of the excerpt focuses on Apple's AI collaboration with Google Gemini rather than NVIDIA specifically.

"Nvidia and Eli Lilly for Drug Discovery. And Nvidia's response to questions about chip payment terms amid ongoing China tensions."

1202. Better Offline

Episode: Part Three: NVIDIA Isn't Enron - So What Is It?
Date: 2025-12-19 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]()
Summary: The podcast discusses concerns around Nvidia's reliance on a few major customers like Oracle and the risks tied to the broader AI infrastructure spending by big tech companies. It notes Nvidia's financial health is linked to the profitability of its key customers' capital expenditures in AI, warning about potential irrational market hopes.

"Nvidia makes the majority of its money selling GPUs to a handful of customers. And so, well, some of those also look to be on some of their own incredibly shaky ground."

1203. Schwab Network

Episode: U.S. & EU Trade Deal: How it Affects Talks with China
Date: 2025-07-28 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses Nvidia's CEO Jensen Huang's lobbying efforts to ease export controls on chips to China, highlighting its significance in the context of U.S.-China trade relations and the impact on Nvidia's stock. The conversation touches on broader trade issues with China but only briefly references Nvidia's situation.

"It's everything from the rare earths, which has been obviously a big focal point of this. It's also about the export controls around chips. This has really become, Diana, arguably a bit of a Jensen Huang story. I mean, down to some very successful lobbying by the Nvidia CEO to get those chips back into China, which has been a big story behind the company and also what we've seen in the stock in recent weeks as well."

1204. MRKT Matrix

Episode: Economic Worries Limit Google Ruling Rally
Date: 2025-09-03 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast briefly mentions Google increasing competition with NVIDIA by promoting its own TPUs and hosting them in third-party data centers, potentially limiting NVIDIA's market space. NVIDIA CEO Jensen Huang is noted for defending GPUs as still preferred due to their versatility and software ecosystem.

"Industry analysts say this reflects a broader trend of diversifying away from NVIDIA's dominance, though NVIDIA CEO Jensen Huang argues GPUs remain preferred due to their versatility and strong software ecosystem."

1205. TechLinked

Episode: RX 9060 XT, Computex, Google AI news + more!
Date: 2025-05-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses recent GPU launches from AMD and NVIDIA, focusing on NVIDIA's new RTX 5060 Ti card, its performance relative to AMD's offerings, and the restricted preview access given by NVIDIA before launch, with some initial reviews just starting to come out.

"NVIDIA only allowed some outlets to publish previews ahead of the RTX 5060's launch on Monday under strict conditions, including being limited to testing certain games and capping every email back to NVIDIA with HAL JENSEN."

1206. No Tux Allowed

Episode: Buy An Intel GPU Dammit
Date: 2025-05-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses Nvidia GPUs primarily in comparison to Intel's new GPU offering, focusing on performance and pricing aspects. It mentions Nvidia's high-end data center GPUs with large RAM but doesn't deeply analyze Nvidia's AI strategy, supply chain, or competition specifics.

"But Yeah It's Going Around To 300 You need To Round That's Just A Trick To To Make You Think You're Saving Yeah It Saved You Seven Cents On The Dollar Yeah So Anyways And The The Honestly It That Price Alone I Performance Charts In Comparison With Like The Other The Other Brands"

1207. The Circuit

Episode: EP 132: Offical Gov. Stake in Intel, NVIDIA's New Scale Across Fabric, NVIDIA Earnings Preview
Date: 2025-08-24 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's potential involvement in governmental investments and strategic positioning alongside other major tech companies in the semiconductor space, particularly in relation to U.S. manufacturing and industry policy. It references NVIDIA's CEO visiting the White House and suggests that the company might consider increasing investments similar to other tech firms, though detailed commentary on NVIDIA's AI strategy, supply chain, or competitive stance is limited.

"Some people are like, obviously it makes a ton of sense if they could stand on their own. And I still like the idea we floated, you know, which is like get your customers to invest. Right. They don't necessarily have board sheets, but get if Microsoft wants to be a customer, Google is going to be a customer. If Amazon is going to be a customer and get them to put some money in."

1208. Tech Updates

Episode: Episode 244 - Spotify's Piracy Quake, Microsoft's C++ Exit, Zuck's 'Action' AI & More Tech Shifts
Date: 2025-12-30 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses rumors and leaked benchmarks about NVIDIA potentially developing an ARM-based chip for PCs, highlighting the competitive chip market in 2026. It mentions NVIDIA's potential to address graphics weaknesses in ARM laptops, positioning this as a possible game-changer amid competition from Intel and AMD.

"There are strong rumors and leaked benchmarks suggesting NVIDIA is working on an ARM-based chip for PCs. Imagine an Alienware laptop with an NVIDIA ARM chip. That would solve the graphics weakness overnight."

1209. Lagniappe

Episode: The Intertwined Finances of AI
Date: 2025-10-09 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent financial arrangements involving NVIDIA, OpenAI, and AMD focusing on vendor financing and circular investment patterns rather than directly covering NVIDIA's AI strategy, supply chain, or competition. There is an explanation of how OpenAI and NVIDIA mutually invest and buy from each other to secure GPU supply.

"OpenAI and NVIDIA reported, Bloomberg reported that NVIDIA agreed to invest up to $100 billion in OpenAI. That $100 billion in cash that OpenAI then used to buy NVIDIA chips."

1210. How to Trade Stocks and Options Podcast with OVTLYR Live

Episode: These 16 Stocks have HUGE POTENTIAL!!
Date: 2025-10-21 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast provides a brief technical analysis of NVIDIA's stock performance, noting a recent sell signal and sideways trading behavior. The discussion centers around capital efficiency and trading signals rather than Jensen Huang's statements or detailed AI strategy, supply chain, or competition.

"Now, a few months ago, you could buy NVIDIA and basically it was going to go up no matter what. Always going to go up. However, however, that's not the case anymore."

1211. Technikquatsch Podcast

Episode: TQ274: Nvidia steigt mit 5 Milliarden Dollar bei Intel ein; Xbox Full Screen Experience auf original Asus ROG Ally; Preview und Playtest zu The Lift" - Houseflipper trifft Sowjet-SciFi gewurzt mit Stranger Things und SCP Foundation
Date: 2025-09-21 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses Nvidia's $5 billion investment in Intel, touching on recent industry news. However, there is no mention of Jensen Huang or detailed discussion about Nvidia's AI strategy, supply chain, or competition.

"Ganz grob ist es so, dass Nvidia sich mit 5 Milliarden bei Intel beteiligen mochte."

1212. PC Perspective Podcast

Episode: Podcast #834 - Win 11 Breaking SSDs, SoftBank Buys Into Intel, 720Hz OLED, Thrustmaster Hypercar, 800w RTX 5090 + MORE!
Date: 2025-08-23 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's GeForce Now service improvements, highlighting enhanced hardware performance with RTX 5080 equivalent, negative latency claims, and AI-driven upscaling for better streaming quality, positioning it as competitive with local gaming experiences.

"You get RTX 5080 performance, local style installs, better game streaming quality, and more."

1213. Off The Console

Episode: Switch 2 vs Steam Deck + AI, Nvidia & Computex 2025 | OTC Ep 31
Date: 2025-05-25 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly touches on the ongoing AMD and NVIDIA competition and discusses some technical aspects related to GPUs and handheld devices. However, there is no direct commentary on Jensen Huang's views or NVIDIA's AI strategy, supply chain, or detailed competition analysis.

"The AMD NVIDIA feud is continuing with some Intel injected in there."

1214. Technikquatsch Podcast

Episode: TQ260: Disney verklagt Midjourney, Microsoft und Asus kooperieren fur Xbox-Handheld ROG Xbox Ally, Intel Arc B770 "Big Battlemage" lebt, Highlights von Xbox Showcase
Date: 2025-06-17 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's recent graphics cards and PR, noting some negative aspects and comparisons with AMD's offerings. There is mention of performance issues and pricing concerns but no in-depth analysis of NVIDIA's AI strategy, supply chain, or competition.

"Es gibt inzwischen auch ubrigens Tests zur 9600 XT mit 6 GB und wie erwartet. Also leistungstechnisch gerade der 1440p ware okay, wenn nicht die 8 GB zu wenig waren."

1215. WSJ Tech News Briefing

Episode: TNB Tech Minute: Meta Beats FTC's Antitrust Case
Date: 2025-11-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of AI stock market pressure and an investment in an AI company, along with a note on CEO Jensen Huang's public disagreements. However, it does not provide an in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA CEO Jensen Huang and Anthropik CEO Dario Amadei have clashed over chip exports and the number of jobs lost to AI."

1216. Kinda Funny Gamescast: Video Game Podcast

Episode: Everything Announced w/ NVIDIA GeForce On at Gamescom - Kinda Funny Gamescast #sponsored
Date: 2025-08-19 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode sponsored by NVIDIA discusses software-focused announcements made at NVIDIA's GeForce event at Gamescom, including updates to their programs and ecosystem, but does not cover new hardware or provide in-depth insights into NVIDIA's AI strategy or supply chain.

"They did a Nvidia G force on community showcase highlighting a whole bunch of new announcements, updates to a lot of the programs and ecosystem that they have at this point. No new hardware. They made that clear going into this."

1217. Kinda Funny Gamescast: Video Game Podcast

Episode: Everything Announced w/ NVIDIA GeForce On at Gamescom - Kinda Funny Gamescast #sponsored
Date: 2025-08-19 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's presence at Gamescom, focusing on their G force initiatives and software ecosystem updates, but without new hardware announcements. The mention highlights NVIDIA's sponsorship and some software features like Nvidia reflex, with general excitement but no in-depth strategic commentary from Jensen Huang.

"So the topic of the show is everything announced with Nvidia G force on at gamescom. They did a Nvidia G force on community showcase highlighting a whole bunch of new announcements, updates to a lot of the programs and ecosystem that they have at this point."

1218. World Business Report

Episode: Nvidia to resume AI chip sales to China
Date: 2025-07-15 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's position as a leading chipmaker and the potential impact of resuming AI chip sales to China amid US-China trade tensions. There is a brief exploration of how access to these chips might boost China's AI ecosystem.

"What does it matter if the world's most valuable company, the chip maker NVIDIA, can sell a certain type of chip to China again?"

1219. Bloomberg Tech

Episode: CoreWeave Tumbles on Data Center Delay
Date: 2025-11-11 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discussed SoftBank selling its entire stake in NVIDIA to fund other AI investments, noting NVIDIA's stock dropped about 2-3%. There was no direct commentary from NVIDIA executives regarding AI strategy, supply chain, or competition.

"SoftBank sells its entire stake in NVIDIA for close to $6 billion. This to help bankroll its other AI investments."

1220. Closing Bell

Episode: Google Monopoly Ruling: Chrome Survives, Competition Opens Up 9/2/25
Date: 2025-09-02 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly mentions NVIDIA as the leading drag on the NASDAQ's recent decline due to underwhelming guidance that spooked investors amid concerns about cooling AI spending and China competition. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition from insiders.

"NVIDIA closed almost 2% lower, closing below its 50-day moving average for the first time since that major sell-off in April, after somewhat underwhelming guidance that spooked some investors and raised some questions about cooling AI spending momentum."

1221. AI News by PocketPod

Episode: Tech Giants Make Bold Moves, AI Research Raises Questions, and NASA's Space Voyagers Return Home
Date: 2025-03-23 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA's recent GTC conference and its groundbreaking announcements, situating the company as a key player reshaping the AI landscape amidst broader industry developments.
"NVIDIA reshapes the AI landscape with groundbreaking announcements."

1222. Closing Bell

Episode: Closing Bell Overtime: 2/3/26
Date: 2026-02-03 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA briefly in the context of market concerns over the relationship with OpenAI affecting semiconductor stocks, noting Jensen Huang's statement to CNBC that the deal is on track. The discussion is a short mention amidst broader tech and market analysis.
"There are questions around the status of the NVIDIA OpenAI relationship weighing on the broader semiconductor sector. We did see shares of NVIDIA turn higher in after-hours trade. Jensen Huang telling CNBC that that deal, everything is on track."

1223. What The Chip Happened - Jose Najarro AI & Chip Stocks

Episode: Google Q2 Earnings Is BULLISH FOR AI STOCK INVESTORS!
Date: 2025-07-24 | Relevance: 45/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA in the context of Alphabet's increased capital expenditure driven by AI demand, which is bullish for NVIDIA as a supplier of AI chips. The speaker mentions tight supply and ongoing capacity expansions in the AI semiconductor sector but does not elaborate in depth on NVIDIA's internal AI strategy, supply chain, or competition.
"Alphabet, aka Google announced that they are increasing their capital expenditure for this year by about $10 billion... that shows two things. First, very bullish for Broadcom and NVIDIA, as these are two companies that provide AI chips for Alphabet."

1224. Tech Cafe

Episode: Nvidia le magnifique
Date: 2025-09-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Nvidia's record-breaking performance through artificial intelligence briefly and comments on technological optimizations in AI models, including Google's efficiency improvements. However, detailed discussion about Nvidia's AI strategy, supply chain, or competition is not present.
"Nvidia qui bat tous les records grace a l'intelligence artificielle"

1225. Know Your Risk Podcast

Episode: The Nvidia/Intel Deal
Date: 2025-09-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses market reactions to a potential Nvidia and Intel deal, highlighting the disproportional increase in Nvidia's market cap due to Intel's small investment stake, and questions the strategic benefit of such a partnership from an outsider perspective.
"If the market move in NVIDIA's stock is correct, we should just YOLO the entire portfolio on Intel. You know what I mean? We're guaranteed, what would that be? Would that be a what? A 16X return? Something like that? 14X return?"

1226. Becker Private Equity & Business Podcast

Episode: Microsoft vs. NVIDIA 6-6-25
Date: 2025-06-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode broadly compares Microsoft and NVIDIA in terms of market capitalization, noting the close values and growth of both companies. It mentions NVIDIA's CEO with a minor factual error and highlights the companies as major market leaders but lacks detailed discussion on NVIDIA's AI strategy, supply chain, or competition.
""Microsoft now is at $3.51 trillion in market cap as of currently. NVIDIA is at $3.47 in market cap currently.""

1227. Inteligencia Artificial, perspectivas financieras

Episode: NVIDIA: Siempre Sorprende, Nunca Sorprende
Date: 2025-02-28 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's stock performance over the past two years, noting significant gains and a recent dip, and briefly touches on considerations when analyzing companies like NVIDIA, such as earnings and market context. It does not include in-depth discussion or direct insights from Jensen Huang about NVIDIA's AI strategy, supply chain, or competition.

"Si hubiesen invertido 10 mil dolares en acciones de NVIDIA alla por el 2022, esos 10 mil dolares se convertirian mas o menos en 94 mil dolares hace dos semanas atras."

1228. Stock Movers

Episode: Nokia Skyrockets on Nvidia Deal, D.R. Horton Falls
Date: 2025-10-28 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses NVIDIA's investment of $1 billion in Nokia, highlighting its push toward AI networking and the positive market reaction, with NVIDIA's stock rising by about 4.9%.

"This is after the announcement that NVIDIA will be investing $1 billion in the company. Of course, this is all in a push toward AI networking here."

1229. AI Hustle: Make Money from AI and ChatGPT, Midjourney, NVIDIA, Anthropic, OpenAI

Episode: The Cyclical Wealth of Nvidia
Date: 2025-10-09 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Nvidia's significant $100 billion investment plan into OpenAI and some controversy around it, but does not provide in-depth insights into Jensen Huang's comments on NVIDIA's AI strategy, supply chain, or competition.

"Now, let's get into what's going on with NVIDIA. Now, there has been a lot of controversy to say the least about this story in particular. And it's because it's not just NVIDIA investing $100 billion into OpenAI, which obviously is a lot of money."

1230. Bloomberg Surveillance

Episode: Nvidia and Trump Impact Markets
Date: 2025-02-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA in the context of its earnings results as part of the broader discussion on market valuations and stock performance. The discussion is general and does not delve into NVIDIA's specific AI strategy, supply chain, or competitive positioning.

"Obviously, NVIDIA, big, big, big name after the close. What have you learned from the earnings?"

1231. Rapid Money Radio

Episode: Nvidia to $6 Trillion? AI Bull Case Heats Up 09/20/25
Date: 2025-09-20 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: An analyst from IO Fund projects Nvidia's market capitalization could reach $6 trillion, indicating substantial upside potential and bullish sentiment for the company's AI chip business.

"IO Fund's Beth Kendig projects Nvidia reaching a $6 trillion market capitalization, implying significant upside for the artificial intelligence chipmaker."

1232. TraderMerlin

Episode: Nvidia Earnings - 08/27/25
Date: 2025-08-27 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent earnings and stock price movements briefly, mentioning anticipation of positive earnings and potential insider information leaks. There is no discussion of Jensen Huang's statements, AI strategy, supply chain, or competition.

"Nvidia Earnings. This was the topic du jour. And over the past few days, we've seen a pretty nice move up in Nvidia with a lot of people anticipating, including myself, that this might be a precursor to a really good earnings announcement that they're pricing it in."

1233. Investment Banking Insights

Episode: Quick NVIDIA Comps Analysis (Capital IQ)
Date: 2025-03-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode explains how to perform a comparable company analysis using Capital IQ, using NVIDIA as an example due to its role as a major AI chip maker; it discusses filtering criteria like industry and revenue but does not delve into NVIDIA's AI strategy, supply chain, or competition.

"So we're going to do a quick comparable company analysis for the company NVIDIA, which is the big AI chip maker."

1234. Kinda Funny Gamescast: Video Game Podcast

Episode: Everything Announced w/ NVIDIA GeForce On at Gamescom - Kinda Funny Gamescast #sponsored
Date: 2025-08-19 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Nvidia's GeForce initiatives and recent Gforce On community showcase at Gamescom, focusing mainly on software updates and partnerships, without new hardware announcements. The discussion is general and promotional rather than providing deep insights into NVIDIA's AI strategy, supply chain, or competitive landscape.
"They did Nvidia G force on community showcase highlighting a whole bunch of new announcements, updates to a lot of the programs and ecosystem that they have at this point. No new hardware. They made that clear going into this. This was going to be a very software focused thing."

1235. Kinda Funny Gamescast: Video Game Podcast

Episode: Everything Announced w/ NVIDIA GeForce On at Gamescom - Kinda Funny Gamescast #sponsored
Date: 2025-08-19 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: This podcast episode includes a promotional partnership with NVIDIA focused on their GeForce initiatives, such as GeForce NOW and the latest 50 series graphics cards, primarily discussing software and ecosystem updates rather than new hardware.
"Nvidia has partnered with us as they often do to help kind of promote their G force initiatives, whether it's G force now or the latest 50 series cards, all that stuff."

1236. Tech News Today | 2 Min News | The Daily News Now!

Episode: Son's NVIDIA Sale: AI Bet or Misstep?
Date: 2025-11-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses SoftBank founder Masayoshi Sun's sale of his NVIDIA shares and his ongoing investment strategy focused on AI, including his future commitments to OpenAI and an AI manufacturing hub. There is no direct commentary from Jensen Huang about NVIDIA's AI strategy, supply chain, or competition.
"SoftBank sold his 32.1 million Nvidia shares, not to diversify, but to double down on other ventures, including a planned $30 billion commitment to OpenAI and a potential one, trillion-dollar AI manufacturing hub in Arizona."

1237. Dagen med Di

Episode: Tokyoborsen faller tungt - Nvidia foll pa rapport
Date: 2025-02-28 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly mentions Nvidia's stock falling 8% after its earnings report, attributing it to turbulent Wall Street conditions and tariff-related concerns impacting the broader market and IT sector. There is no direct discussion involving Jensen Huang or detailed analysis of Nvidia's AI strategy, supply chain, or competition.
"IT-sektorn agerar sanka efter Nvidia's rapportfall igar."

1238. Next in Tech

Episode: NVIDIA quarterly earnings
Date: 2025-02-25 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: This podcast episode previews NVIDIA's position in the generative AI space and introduces Visible Alpha, a provider of investment research, with some discussion on market expectations ahead of NVIDIA's quarterly earnings call. However, there is little direct commentary from NVIDIA executives or deep insights into AI strategy, supply chain, or competition.
"NVIDIA has been front and center in all of the excitement that is all things generative AI."

1239. PSICOLOGIA DEL EXITO, ECONOMIA, FILOSOFIA, POLITICA

Episode: La bolsa respira: NVIDIA aleja los fantasmas de burbuja... por ahora
Date: 2025-11-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's recent market performance in the AI sector, mentioning a drop in stock values amid concerns of a potential AI investment bubble, but also notes a possibly short-lived pessimism due to varied economic forecasts for AI's future impact.
"'Hace apenas dos dias dedicamos un video a explicar que el mercado llevaba aproximadamente un mes muy miedoso con respecto a las perspectivas de futuro de la industria de la inteligencia artificial.'"

1240. Emerging Technology Trends: AI, Robotics & Digital Innovation

Episode: Robots Are Taking Over and Jensen Huang Just Made It Official: The AI Tea You Need to Hear
Date: 2026-01-31 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA and Jensen Huang in the context of recent AI breakthroughs and industry trends, highlighting Huang's statement at CES about physical AI. However, it provides only a brief overview without detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"Recent breakthroughs include Nvidia's Jensen Huang declaring the chat GPT moment for physical AI at CES."

1241. Bob Murphy Show

Episode: Ep. 473 Elon Predicts No Work and No Money
Date: 2025-12-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a recent U.S.-Saudi Arabia Investment Forum panel featuring Elon Musk and NVIDIA CEO Jensen Huang, highlighting a $10 million AI data center project in Saudi Arabia and remarks about AI's impact on the economy. However, the discussion focuses more on the event's context and Elon Musk's statements rather than a detailed analysis of NVIDIA's AI strategy, supply chain, or competition.

"Elon Musk went on camera and just casually said that he thinks in the next 10 to 20 years, work will be optional and money, currency kind of won't be a thing, all because of how incredibly productive AI and humanoid robots are going to be."

1242. Corporate Competitor Podcast

Episode: NVIDIA's Anthony Robbins on what makes Jensen Huang unlike any other CEO
Date: 2025-11-26 | Relevance: 40/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode features Anthony Robbins, a former NVIDIA executive, discussing leadership and sales strategies with references to his experience at NVIDIA. However, there is limited direct discussion of NVIDIA's AI strategy, supply chain, or competition.

"Until you can be an expert in the value of that product to the work that your customers are responsible for doing, then most times it doesn't actually matter."

1243. Squawk Box Europe Express

Episode: Nvidia announces $100bn investment in Open A.I.
Date: 2025-09-23 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA's $100 billion investment in AI and its partnership on AI data centers with OpenAI, highlighting the company's leadership role in the largest AI infrastructure project. Jensen Huang's remarks point to current compute constraints and strong demand in the AI industry.

"This is the biggest A.I. infrastructure project in history. This is the largest computing project in history. The compute constraints that the whole industry has been in, our company in particular, have been terrible."

1244. Win the Day

Episode: 261. The Real Goal of Winning (It's Not What You Think)
Date: 2025-11-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast host briefly discusses Jensen Huang's long-term vision for NVIDIA and his philosophy on building winning products over time, highlighting NVIDIA's impressive growth under his leadership.

"I don't need to change the world overnight. I'm going to change the world over the next 50 years. I don't need to build a killer product overnight. I just need to build a winning product."

1245. World Business Report

Episode: Nvidia to resume AI chip sales to China
Date: 2025-07-15 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's resumption of AI chip sales to China in the context of US-China trade tensions, highlighting the potential impact on China's AI ecosystem and the chip industry's market dynamics.

"It'd be a big deal because if China can get access to these chips at the scale it wants, hundreds of thousands, it would provide a real boost to China's AI ecosystem."

1246. Wall Street mit Markus Koch - featured by Handelsblatt

Episode: AMD und NVIDIA CEOs sehen rosige Zukunft | Sneaker-Werte unter Druck
Date: 2026-01-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA CEO Jensen Huang's optimistic remarks at CES regarding AI, autonomous driving, and robotics, highlighting bullish market sentiment around NVIDIA. However, there is no detailed discussion on NVIDIA's AI strategy, supply

chain, or competition.

"so, einen schonen guten Morgen und weiter steigt der Nasdaq und das vor allem auch dank der gestrigen Reden des CEOs von Nvidia Jensen Huang im Umfeld der Consumer Electronic Messe in Las Vegas"

1247. Markt-Trends setzen mit Swissquote

Episode: Ist Buy-the-Dip zuruck? | New York to Zurich Taglich
Date: 2026-02-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions a reported $100 billion financing deal between OpenAI and Nvidia that is reportedly on hold, with Jensen Huang denying the accuracy of the story. The discussion raises questions about the actual extent of Nvidia's commitment to the deal.

"The Wall Street Journal berichtet, dass die 100 Milliarden Dollar Finanzierung zwischen OpenAI und Nvidia auf Eis liegt. Das wurde von Jensen Huang noch nicht bestatigt. Der sagt, dass diese Geschichte so nicht ganz korrekt sei."

1248. Markt-Trends setzen mit Swissquote

Episode: NVIDIA CEO bullish | New York to Zurich Taglich
Date: 2026-01-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA briefly in comparison to AMD in the context of stock performance following CES announcements, noting Jensen Huang's bullish outlook and plans for expansion in autonomous driving and robotics. However, the discussion on NVIDIA is limited and not deeply detailed.

"NVIDIA nur ein leichtes Plus, obwohl Jensen Wang ein sehr bullisches Bild malt. Man wird unter anderem aggressiv im Bereich autonomes Fahren und im Bereich Robotics expandieren."

1249. From Chad

Episode: Resilience #782
Date: 2025-08-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly discusses Jensen Huang's personal resilience and background, highlighting his role as NVIDIA's CEO and the company's notable market capitalization. It touches more on his personal story than specific AI strategy, supply chain, or competition.

"Success cannot be taught, but if that is your aim, then, quote, I wish upon you ample doses of pain and suffering, end quote."

1250. The John Batchelor Show

Episode: PRC: Trump administration changes course on Nvidia to Beijing. Josh Rogin, WaPo
Date: 2025-08-19 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the Trump administration's pressure on Tan, the new CEO of a major tech company, to align politically, mentioning NVIDIA among other tech companies expected to engage with the White House. The conversation touches briefly on broader U.S. semiconductor industry issues but lacks direct discussion of NVIDIA's AI strategy, supply chain, or competition.

"Everyone has to do it. Everyone has to do it. NVIDIA, Apple, OpenAI, Facebook. It doesn't matter. Trump expects you to come to the Oval Office and make some sort of deal."

1251. Formosa English News

Episode: Aug. 27, 2025 Formosa Headline News
Date: 2025-08-28 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions a collaboration between Techman Robot and NVIDIA on the development of the TMX4i robot, highlighting the integration of NVIDIA technology in robotics scheduled for mass production in 2026.

"The latest TMX4i robot was developed with NVIDIA and scheduled for release in September and mass production in 2026."

1252. MRKT Matrix

Episode: Stocks & Gold Tick Higher As Shutdown Continues
Date: 2025-10-08 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA in the context of AI chip demand and CEO Jensen Huang's comments on increased computing needs, highlighting robust demand for AI technologies. However, the discussion is brief and framed within broader market and economic topics, without detailed focus on supply chain or competition.

"CEO Jensen Huang highlighting substantially increased computing needs in recent months."

1253. AI in Business

Episode: NVIDIA Invests $2B in CoreWeave
Date: 2026-01-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's $2 billion investment in CoreWeave to expand AI compute capacity and touches on CoreWeave's situation. It does not include direct quotes from NVIDIA executives or detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA has just made a $2 billion investment deal towards CoreWeave, which will help them add 5 gigawatts of AI compute."

1254. Rob Black Show

Episode: Strategy Show Highlighting Trends
Date: 2025-08-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions NVIDIA as part of the Magnificent Seven stocks with substantial gains, highlighting its 171% surge in 2024 driven by AI chip demand. The discussion is broad, framing NVIDIA within market trends rather than an in-depth company-specific analysis.

"NVIDIA surged 171% in 2024, riding AI chip demand."

1255. The AI News Daily Brief

Episode: Huawei's AI Chips, DeepSeek's Strategy, ChatGPT Ads, and AI Investment Trends
Date: 2025-09-29 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Huawei's aggressive expansion in AI chip production and mentions NVIDIA's challenges due to geopolitical issues, highlighting the competitive dynamics in the semiconductor industry.

"NVIDIA Corporation, a major competitor, is grappling with geopolitical headwinds."

1256. Skippy and Doogles Talk Investing

Episode: Operating Margins, 4,000 Terrible Stocks & the Wild Google Comeback
Date: 2025-11-24 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's dominance in semiconductor operating margins, suggesting it captures most of the industry's value, but provides no direct commentary from Jensen Huang or detailed insights about NVIDIA's AI strategy, supply chain, or competition.

"It means NVIDIA takes all the money. I mean, that's what it means. All the cash monies."

1257. This Week's Tech: AI News, Tech News, OpenAI, ChatGPT, Google Gemini

Episode: Understanding Google's AI Compute Strategy
Date: 2025-11-24 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions NVIDIA in the context of their Q3 earnings and AI chip sales growth, noting NVIDIA's strong performance despite speculation about an AI bubble. However, there is no direct discussion of Jensen Huang's comments on NVIDIA's AI strategy, supply chain, or competition.

"We had a recent event, which was that NVIDIA came out with their Q3 earnings and they beat expectations and they had an insane, you know, some insane earnings numbers."

1258. Members Podcast

Episode: Members Podcast - Friday 22nd August
Date: 2025-08-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses upcoming NVIDIA earnings results, market expectations with analysts raising price targets, and the potential impact on the stock amid a generally trendless market. It touches on broad market conditions and briefly mentions NVIDIA's high valuation and analyst optimism, but lacks detailed discussion on NVIDIA's AI strategy, supply chain, or competition.

"Interestingly running into the results you might have noticed there was an article in the AFR today saying at least 9 analysts have lifted their 12 month target prices on Nvidia in the last week ahead of results and the average target price is $194 Nvidia is currently around $175 so expectations are pretty high."

1259. The Six Five with Patrick Moorhead and Daniel Newman

Episode: EP 275: AI's Ripple Effect: The White House, Job Market, Chip Wars, and Corporate Strategy
Date: 2025-09-08 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions rumors about NVIDIA subcontracting services back to cloud providers to use its GPUs, clarifying that NVIDIA is not a cloud provider and needs managed services capacity. There is some discussion around AI and competitive dynamics, but NVIDIA's AI strategy or supply chain is not deeply analyzed.

"There's been a few others, like that rumor about NVIDIA subcontracting services back to one of the clouds to use its own GPUs, making that seem like that was a big round tripping deal when in actuality, they're not a cloud provider and they need capacity and they need managed services."

1260. AI News Daily

Episode: US Approves Nvidia Export to UAE, IIT Madras Unveils AI Framework, Sovereign AI Alliance Shifts Asia Pacific, AI Artist Debuts on Billboard, and more...
Date: 2025-11-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the US granting Microsoft permission to export Nvidia AI chips to the UAE, highlighting regulatory and geopolitical contexts affecting Nvidia's AI hardware distribution. There is no direct mention of Jensen Huang or detailed insights into Nvidia's AI strategy, supply chain, or competition.
"The United States has granted Microsoft permission to export Nvidia AI chips to the United Arab Emirates, marking a notable expansion of AI infrastructure in the Gulf."

1261. The Last Invention is AI

Episode: Black Forest Labs Raises $300M To Expand AI Deployment
Date: 2025-12-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's role as an investor in Black Forest Labs, highlighting NVIDIA's investment strategy in AI startups and its interest in AI model compute capabilities. However, there is no direct mention from Jensen Huang or detailed discussion about NVIDIA's AI strategy, supply chain, or competition.
"Of course, I think another interesting component to this is the fact that they had NVIDIA investing in them because NVIDIA is obviously a massive benefactor of their models..."

1262. The Six Five with Patrick Moorhead and Daniel Newman

Episode: EP 280: Qualcomm, AMD, & Intel: Navigating the AI Revolution's Key Players
Date: 2025-10-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses various industry news including NVIDIA's market response to AMD and OpenAI news, noting surprise among NVIDIA supporters regarding recent competitive developments. However, there is limited detailed discussion on NVIDIA's AI strategy, supply chain, or competition from Jensen Huang.
"Look, this one came out of kind of nowhere. I mean, just a week before, Pat, there was like $100 billion investment. And I think it just blew the tops off. NVIDIA Bulls couldn't believe it. They were absolutely stunned that this had happened."

1263. Halftime Report

Episode: Nvidia Turns Negative: What it Means for the Market 11/20/25
Date: 2025-11-20 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly discusses Nvidia's stock decline after an earnings-driven rally, linking the market pullback to cryptocurrency losses and broader market risk-off sentiment, without deep detail on Nvidia's AI strategy or supply chain.
"I think everybody's trying to figure out what's going on after that great Nvidia report that made every index pop and now we're giving up all those gains."

1264. Machine Learning Street Talk

Episode: Understanding Trump's AI Strategy Explained
Date: 2025-07-30 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent U.S. policy changes under the Trump administration affecting NVIDIA's ability to sell AI chips globally, including a relaxation of restrictions to compete in the AI race against China. There is no direct commentary from Jensen Huang, nor detailed discussion on NVIDIA's AI strategy, supply chain, or competition.
"He pulled back a bunch of restrictions for NVIDIA to sell AI chips around the globe, basically to China."

1265. The Banker Next Door

Episode: BND: Strategy Room 11-1-2025
Date: 2025-11-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Amazon's cost-cutting measures to allocate more capital for AI advancements, highlighting the necessity to purchase chips from NVIDIA but does not provide direct commentary on NVIDIA's own AI strategy or supply chain.
"Amazon is so desperate to keep up in the AI arms race that basically they need every dollar they can get their hands on for capital expenditure, for the CapEx, to put into R&D, to buy the chips from NVIDIA, to get, you know, to basically keep up with all the AI power."

1266. NZ Tech Podcast

Episode: NZ's AI Strategy, Crypto ATM Crackdown and Police Cybersecurity Concerns
Date: 2025-07-15 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's remarkable market cap growth and legacy from under $1 to over $164 in stock price, noting its early AI initiatives such as RTX and how the company has benefited from shifts in infrastructure demand. The remarks are general and lack detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA had a $4 trillion US market cap. The first company to do so. Quite an incredible number when you think about it."

1267. Cisco Podcast Network

Episode: Cisco SE Talks: AI Security, Deployment and Strategy with Cisco + WWT
Date: 2025-09-10 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Cisco's AI strategy and mentions collaboration with NVIDIA for Spectrum X offerings integrated into Nexus switches, highlighting ongoing efforts to make AI adoption easier for customers through partnerships and known product toolsets.
"We can do that for you in two weeks because we're working with NVIDIA to get the Spectrum X offerings."

1268. Discover Crypto

Episode: Bitcoin Nvidia DOOMSDAY? (MAJOR Strategy WARNING)
Date: 2025-11-21 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mention includes a discussion about NVIDIA's significant market capitalization and recent stock price drop following earnings that missed expectations, but focuses more on market implications and trading strategies than on Jensen Huang's comments or NVIDIA's AI strategy, supply chain, or competition.
"It's almost like the old school trading methods that these robots got trained, how we were using now are being used against traders who just can't break out of that paradigm."

1269. Neural Newscast

Episode: Prime Cyber Insights: The Luxshare Breach and the 2026 CEO Risk Pivot
Date: 2026-01-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA only briefly as part of a group whose sensitive data was reportedly compromised in a cyberattack on Luxshare. The discussion focuses on cybersecurity threats and trends rather than on NVIDIA's AI strategy, supply chain, or competition.
"This archive reportedly contains sensitive data from NVIDIA, Tesla, and Intel."

1270. Bloomberg Talks

Episode: AMD CEO Lisa Su Talks New Data Center Chip, Demand
Date: 2026-01-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast features AMD CEO Lisa Su discussing AI and data center chip demand, with mentions of AMD's offerings compared to NVIDIA's, highlighting AMD's open ecosystem and cost advantages but providing limited direct commentary on NVIDIA's AI strategy or competition.
"What makes this generation of AMD accelerators the better option, particularly for on-prem and at the edge, over what NVIDIA is offering right now?"

1271. Good Clean Energy

Episode: Unlocking the fusion industry supply chain, with Kyoto Fusioneering's Richard Pearson
Date: 2025-06-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt uses NVIDIA as an analogy to describe a company that provides enabling technology for fusion energy development, similar to how NVIDIA powers the AI industry with GPUs. The discussion touches on NVIDIA's role in supporting AI rather than building end products.
"Another way to think about you, if we leave the auto industry and we talk about what's happening today, which is the AI industry, that's being powered by NVIDIA, right? They manufacture GPUs. You guys are not building the end product. You're not building a fusion reactor. You're providing the enabling technology so you can support multiple companies to get to a successful fusion machine faster."

1272. Monetary Matters with Jack Farley

Episode: Citrini's 26 Trades for 2026 | Citrini on BS Jobs, AI Materials, Advanced Packaging, World Cup, & More
Date: 2025-12-31 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the impact of AI technologies like those NVIDIA develops on the job market and investment landscape, mentioning NVIDIA in the context of supply chain and advanced packaging challenges relevant to computing power for AGI.

"Maybe the stock market continues to just to play the easiest thing, which is NVIDIA and the supply chain and all these other things that we talk about, like advanced packaging and the bottlenecks towards making compute capable of doing AGI."

1273. Bitcoin Park

Episode: Bitcoin Brainstorm 16 | Risks In Bitcoin: Supply Chain And Hardware Centralization
Date: 2025-02-28 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor supply chain complexities relevant to NVIDIA, emphasizing geopolitical risks and manufacturing challenges shared by NVIDIA and other chip makers, but does not provide detailed commentary on NVIDIA's AI strategy or competition.
""we are victims and beneficiaries of the same problem that NVIDIA has and everybody else, right, because these chips are made in a couple places. They're very expensive to make.""

1274. The Future of Supply Chain: a Dynamo Ventures Podcast

Episode: Investing in the Future: Lessons from Dynamo's Latest Fund and Team
Date: 2025-05-14 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the lifting of rare earths restrictions by China and its potential indirect positive impact on the semiconductor industry, including companies like NVIDIA, particularly in relation to the AI race and supply chain considerations. There is no direct detailed commentary from NVIDIA executives on their AI strategy, supply chain, or competition.
"I think it definitely bodes well for the industry from a semiconductor technology perspective."

1275. Breaking News | Latest Episodes

Episode: Perplexed Automakers Take on Tariffs, Supply Chain Struggles
Date: 2025-05-02 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The speaker discusses NVIDIA briefly in the context of investment strategy, noting that NVIDIA's earnings potential is higher than that of stable companies like Coca-Cola, and that the recent pullback in tech stocks presented an opportunity to buy NVIDIA at a more reasonable valuation.
"At the end of the day, NVIDIA is going to do better than Coca-Cola, nothing against Coca-Cola, but just their earnings potential is higher."

1276. The Zero100 Podcast

Episode: Is Simulation Supply Chain's Next Digital MVP?
Date: 2025-03-31 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses simulation and digital twin technologies in supply chain optimization, mentioning Lenovo's partnership with NVIDIA for predictive maintenance and factory design. However, the focus is broad on supply chain innovations, with only passing reference to NVIDIA in context of Lenovo's use of its technology.
"Lenovo, in addition to a partnership they have with NVIDIA to leverage digital twins for predictive maintenance, they're also using the technology for factory design."

1277. Chain Reaction

Episode: How Trump's Trade Wars Are Crippling Global Markets
Date: 2025-08-12 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the impact of U.S. tariffs on semiconductor imports, mentioning that companies like Nvidia benefit from exemptions due to local manufacturing investments such as TSMC's Arizona plant. It covers broader industry effects from tariffs on supply chains and pricing, with some indirect implications for Nvidia's supply chain and cost environment, but does not feature direct statements from Jensen Huang or detailed NVIDIA AI strategy discussion.
"TSMC's $165 billion investment in Arizona shields its clients, such as Apple and Nvidia, from penalties."

1278. Hello OSCM

Episode: #93 Behind the Rankings: How Gartner Picks the Best Supply Chains
Date: 2025-08-09 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses NVIDIA's supply chain performance, noting that NVIDIA ranks second in Gartner's Global Supply Chain Top 25 for 2025, highlighting its alignment of business strategy, technological innovation, and supply chain operations. The episode explains the criteria Gartner uses for ranking but provides limited depth on NVIDIA's AI strategy or competition.
"In 2025, Schneider Electric holds the top spot, followed by Nvidia in second place in Gartner's Global Supply Chain Top 25."

1279. Sharp Tech with Ben Thompson

Episode: Intel and the US Semi Future, Will Any Big Tech Incumbents Lose in an AI World?, Questions on Tea, Grok, and The Ringer
Date: 2025-07-30 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses semiconductor manufacturing fundamentals, noting that NVIDIA relies on TSMC for manufacturing while Intel is fully integrated, influencing their respective business models and capabilities. It touches on the broader chip production challenges but does not directly address NVIDIA's AI strategy, supply chain specifics, or competitive stance in depth.
"Like Intel was the NVIDIA back in the day because they made their own manufacturing. So NVIDIA has to pay TSMC a bunch."

1280. Rule Breaker Investing

Episode: Stock Stories, Vol. 11: Silicon, Supply Chains & Spicy Wings
Date: 2025-10-15 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly mentions NVIDIA as a successful company in the semiconductor industry along with competitors like AMD and Intel, highlighting the overall positive investment outcome from holding NVIDIA stock. There is also mention of the strategic importance of these companies in AI and the semiconductor sector.
""Although having bought and held Nvidia, we've all benefited.""

1281. The Quantum AI Digest

Episode: The Quantum AI Digest: 31 January 2026 Daily Dispatch
Date: 2026-01-31 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA as part of a large joint investment with Amazon and Microsoft in the AI sector, highlighting a historic fundraising round aimed at consolidating control over AI ecosystem and infrastructure. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA, Amazon, and Microsoft, which now owns more than a quarter of OpenAI, are in negotiations for up to $60 billion in joint investments as part of a historic $100 billion fundraising round."

1282. Monetary Matters with Jack Farley

Episode: What Investors Are Overlooking in AI & Semis | Val Zlatev
Date: 2025-06-05 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion focuses on the semiconductor industry's growth dynamics and investors' lack of deep knowledge in hard tech stocks like NVIDIA, highlighting the fragmented nature of the semiconductor supply chain and investors' underweight position in the sector despite recent strong performance.
"If you talk to most people and you ask them about a hard tech name, like they'll know Intel, they'll know Nvidia, ASML."

1283. Data Driven

Episode: Compute, Carbon, and Cashflow Silicon Data's Big Bet on GPU Markets
Date: 2025-10-01 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses concepts related to GPU markets, fungibility across different chip types, and ecosystem competition potentially involving NVIDIA and AMD. The discussion touches on creating indexes for GPU chips and considers future trends in multi-modality AI models but without detailed focus on NVIDIA's AI strategy, supply chain, or competition.
"Eventually, it'll probably end up. Eventually, we'll see when, right? We'll see quantum happens first or everyone catching up first."

1284. El Brieff

Episode: Los incendios de Claudia: Las noticias para este martes
Date: 2025-07-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions a temporary freeze on U.S. technological export restrictions to China affecting NVIDIA's H2O chip, and concerns about this policy risking U.S. AI industry competitiveness.
"This includes the postergation del bloque del chip H2O de NVIDIA disenado para el mercado chino."

1285. Bloomberg Tech

Episode: AMD Forecast Fails to Impress Investors
Date: 2026-02-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a Bloomberg report about NVIDIA nearing a deal to invest $20 billion in OpenAI, highlighting NVIDIA's significant involvement in AI funding rounds. There is also brief mention of technology sector challenges and competition but limited focused analysis on Jensen Huang's commentary or supply chain details.
"Bloomberg reports NVIDIA is nearing a deal to invest $20 billion in OpenAI, with the AI company looking to raise up to $100 billion in its new funding round."

1286. Bloomberg Tech

Episode: OpenAI Targets Banking, Warner Bros. Considers Sales Options
Date: 2025-10-21 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the AI market broadly, mentioning NVIDIA's role in AI accelerators and supply chains, and touches on the company's efforts related to on-shoring chip production in the US. However, the focus is mainly on the semiconductor industry and suppliers with limited specific commentary on NVIDIA's AI strategy or competition.
"The on-shoring of the supply chain story focused on those bigger names at first, right? You know, NVIDIA was very aggressive to point out all of its capital commitments to this nation, and taking the first Arizona-produced chips from TSMC."

1287. @HPCpodcast with Shahin Khan and Doug Black

Episode: HPC News Bytes - 20260202
Date: 2026-02-02 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Microsoft's introduction of the Maya 200 chip and its intention to reduce reliance on NVIDIA by developing its own AI inference silicon, while still maintaining purchases from NVIDIA among other vendors. Detailed technical specifications of Microsoft's new chip are provided, with some implications for NVIDIA's competitive position in AI hardware.
"Microsoft claims Maya 200 is the most performant silicon from any of the hyperscalers and the most efficient inference system Microsoft has ever deployed, but they will continue to buy chips from merchant chip vendors, NVIDIA, AMD, and perhaps others."

1288. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry landscape including companies like Nvidia as fabless semiconductor designers who rely on companies like TSMC for chip manufacturing, amidst U.S. export controls and geopolitical concerns. However, there is no direct discussion of Jensen Huang or Nvidia's AI strategy specifically.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1289. Bloomberg Tech

Episode: Bloomberg Tech at CES
Date: 2026-01-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion primarily focuses on AI usage in enterprises, highlighting AMD's AI accelerators and their advantages, with a comparison to NVIDIA's offerings. NVIDIA is mentioned mainly as a competitor to AMD's new generation chips, but there is no direct discussion from Jensen Huang about NVIDIA's AI strategy, supply chain, or competition.
"What makes this generation of AMD accelerators the better option, particularly for on-prem and at the edge, over what NVIDIA is offering right now?"

1290. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry landscape, mentioning NVIDIA along with AMD and Qualcomm as fabless semiconductor designers who do not manufacture their own chips, highlighting the complexity of the supply chain in the context of US-China trade tensions and export controls.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1291. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode discusses the semiconductor industry manufacturing landscape and mentions NVIDIA as a fabless semiconductor maker alongside AMD and Qualcomm. It touches on manufacturing concentration in Taiwan and U.S. export controls affecting China, but does not provide insights into NVIDIA's AI strategy, supply chain specifics, or competitive positioning.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1292. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor manufacturing landscape, including NVIDIA's role as a fabless semiconductor designer but does not include direct commentary from Jensen Huang about NVIDIA's AI strategy, supply chain, or competitive positioning.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1293. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor manufacturing landscape, including companies like NVIDIA as fabless manufacturers that design but do not fabricate chips. It touches on supply chain dynamics, manufacturing concentration in Taiwan, and the impact of U.S. export controls on the industry, without direct focus on NVIDIA's AI strategy or competition.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1294. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode discusses the semiconductor industry landscape, mentioning NVIDIA as a fabless manufacturer alongside AMD and Qualcomm, in the context of the broader supply chain and geopolitical factors affecting chip manufacturing.
"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1295. Next-Gen Tech: Innovate or Die

Episode: Next Generation Tech in 2025: AI, Data Centers, and Smart Devices Revolutionize Global Industries and Innovation
Date: 2025-10-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA in the context of a significant deal with OpenAI to supply systems for Next-Gen AI infrastructure, highlighting NVIDIA's substantial investment amidst a broader industry race to secure compute power for AI development. However, the discussion remains general and does not delve into specifics about NVIDIA's AI strategy, supply chain, or competitive positioning.
"OpenAI and NVIDIA recently inked a deal that will see OpenAI deploy at least 10 gigawatts of NVIDIA systems for its Next-Gen AI infrastructure, with NVIDIA investing up to $100 billion as each gigawatt comes online."

1296. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt discusses the semiconductor manufacturing landscape, mentioning NVIDIA as a fabless manufacturer specializing in research and design without fabrication. It focuses more on the industry supply chain, production capacities worldwide, and export controls targeting advanced semiconductors rather than NVIDIA's AI strategy specifically.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1297. (Audio)NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry landscape, mentioning Nvidia as a fabless manufacturer among others, with a focus on manufacturing locations, capacities, and export controls impacting chip production globally. Nvidia is referenced in the context of industry classification rather than discussion of its AI strategy or competitive stance.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as FABL's manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1298. The Mother Of All Evils + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor supply chain, mentioning NVIDIA as a fabless manufacturer that designs but does not fabricate chips, within the broader context of U.S. semiconductor manufacturing and export controls.

"Advanced micro-devices, commonly known as AMD, NVIDIA, and Qualcomm are what are now known as fabless manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1299. Iowa Business Report

Episode: Iowa Business Report Friday Edition -- Apr. 25, 2025
Date: 2025-04-25 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA and AMD's plans to relocate manufacturing to the U.S. to secure the supply chain, emphasizing the challenges involved in shifting production and the need to build infrastructure and workforce domestically. It highlights broader supply chain considerations rather than providing specific insights into NVIDIA's AI strategy or competition.

"We invented this industry, we're currently designing it, but then why is it made insecurely somewhere else? They get the message, so we're changing the course."

1300. WSJ What's News

Episode: The Uncertain Road Ahead for Chip Makers
Date: 2025-04-17 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the broader chip industry context affecting NVIDIA, particularly around trade restrictions, tariffs, and TSMC's earnings and investments, which impact NVIDIA's supply chain. However, there is no direct statement from Jensen Huang or detailed discussion of NVIDIA's AI strategy or competition.

"Global markets are finding their footing a day after a tech stock fueled route on the Nasdaq that was triggered by deepening trade restrictions targeting chip industry leaders NVIDIA and AMD."

1301. Asia Geopolitics

Episode: DeepSeek and the AI Competition
Date: 2025-02-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the impact of the Chinese AI company DeepSeek on NVIDIA's share price and the competitive landscape in AI, mentioning NVIDIA's role as a semiconductor designer but without detailed discussion of Jensen Huang or NVIDIA's AI strategy.

"Analysts said this, you know, caused NVIDIA's share price to drop nearly 20%. NVIDIA is an American company that makes computer components, including designing semiconductors and things like that, various chips."

1302. The Financial Exchange Show

Episode: Does Nvidia finally have real competition from China?
Date: 2025-08-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the emergence of Chinese companies like Alibaba creating AI chips as potential alternatives to NVIDIA, highlighting China's supply capabilities but does not feature direct commentary from NVIDIA or Jensen Huang regarding NVIDIA's AI strategy or competition.

"Basically, these companies are trying to come up with alternatives to NVIDIA chips."

1303. The Elon Musk Update

Episode: Cloud Wars: OpenAI & Oracle's Next Move
Date: 2025-10-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses OpenAI's new data centers project and mentions NVIDIA's role in funding this initiative. However, there is no direct input from Jensen Huang about NVIDIA's AI strategy, supply chain, or competition.

"...impact this has had on Oracle, how NVIDIA is helping to fund this, and a lot more."

1304. Last Week in AI

Episode: A Look Inside America's Semiconductor Struggles
Date: 2025-07-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast episode touches on NVIDIA's involvement in US semiconductor export controls, including a mention of CEO Jensen Huang responding to industry debates on chip export restrictions to China. However, the discussion is more focused on broader industry and policy context than detailed NVIDIA AI strategy or supply chain specifics.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling

us who we can and can't ship chips to."

1305. Artificial Intelligence: AI News, ChatGPT, OpenAI, LLM, Anthropic, Claude, Google AI

Episode: U.S. Chips Industry Faces Roadblocks and Rewards
Date: 2025-07-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA in the context of US chip export controls, mentioning CEO Jensen Huang's rebuttal to competitor arguments about restricting shipments to China, illustrating some industry dynamics around AI chip export policies and competition.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1306. The Elon Musk Update

Episode: The Semiconductor Challenge: Can the U.S. Compete?
Date: 2025-07-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly touches on NVIDIA CEO Jensen Huang's response to competitor Anthropic's advocacy for stricter US chip export controls, highlighting Huang's stance on focusing on innovation rather than export restrictions. It also references broader US semiconductor industry regulations affecting AI chip exports.

"NVIDIA CEO Jensen Huang kind of called him out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1307. Machine Learning Guide

Episode: U.S. Semiconductor Push and Its Global Impact
Date: 2025-09-16 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast discusses NVIDIA CEO Jensen Huang's response to chip export controls advocated by Anthropic, highlighting tension around US AI chip export restrictions and some industry drama, but includes mostly general semiconductor industry context rather than an in-depth look at NVIDIA's AI strategy or supply chain.

"NVIDIA CEO Jensen Huang kind of called [Dario Amadeo] out later this year and said like, hey, you guys just work on your innovation. Stop telling us who we can and can't ship chips to."

1308. Bloomberg Tech

Episode: AI Fuels Tech Selloff, President Trump To Meet Tech CEOs
Date: 2025-03-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a tech sell-off impacting NVIDIA's stock along with other chip companies. It touches on concerns about AI competition from China and U.S. trade policy implications for the tech sector but offers no direct discussion by Jensen Huang or detailed insights on NVIDIA's AI strategy, supply chain, or competition.

"The Nasdaq 100 dragged lower from a point's perspective by NVIDIA, by Broadcom, by Amazon."

1309. The RAIZOR Report: Daily AI News in 5 Minutes

Episode: Tech Force Launch, Meta Regulation, Waymo AI, ChatGPT Market Shift, Nvidia's Chip Partnership
Date: 2025-12-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA as a collaboration partner in a U.S. government AI initiative called TechForce, highlighting the company's involvement in AI projects related to defense and IRS enhancements. However, there is no direct discussion of Jensen Huang's statements or detailed insights on NVIDIA's AI strategy, supply chain, or competition.

"Notable collaboration partners include OpenAI, NVIDIA, Microsoft, Meta, and Palantir, contributing expertise to projects such as developing AI systems for defense and enhancing IRS capabilities."

1310. Bloomberg Talks

Episode: Greylock Partner & LinkedIn Co-Founder Reid Hoffman Talks Investing In The AI Sector
Date: 2025-07-10 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly mentions NVIDIA in the context of its market valuation and the AI industry's competitive landscape, emphasizing NVIDIA's former status as a four trillion dollar company during discussions about AI talent investment and market dynamics. However, there is no direct discussion of Jensen Huang's statements, NVIDIA's AI strategy, supply chain, or specific competitive approaches.

"Today, for a brief moment, one of them was a four trillion dollar company. Yes, exactly. It's NVIDIA."

1311. AI Investing: for the AI Investor

Episode: Reflection AI Secures $2B War Chest Against DeepSeek
Date: 2025-10-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's investment in Reflection AI, highlighting NVIDIA's strategic move to back a company that will likely use its GPU chips extensively. It frames NVIDIA's involvement as a smart financial and strategic decision within the AI investment landscape.

"'As far as who's actually investing and putting money in, they have Nvidia, of course, why would Nvidia not put money into a $2 billion, you know, an $8 billion company that's taken in $2 billion that inevitably is going to have to spend most of that on Nvidia GPU chips.'"

1312. Tech News Daily

Episode: Asian Stocks Drop Amid Tariffs, OpenAI Unveils GPT-4.5, Meta Launches AI Chatbot App, Amazon Launches Smarter Alexa+, and more...
Date: 2025-02-28 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast briefly mentions NVIDIA's leadership optimism about margin improvements and analysts' confidence in the company's long-term potential amid market volatility and trade tensions. There is no direct discussion from Jensen Huang or detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA's leadership remains optimistic about margin improvements expected by year-end."

1313. The AI Podcast

Episode: U.S. Startup Reflection AI Raises $2B to Take on DeepSeek
Date: 2025-10-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses a $2 billion investment round in Reflection AI, highlighting NVIDIA's participation to supply GPU chips supporting AI development. It acknowledges NVIDIA's strategic move to back AI startups driving forward open source AI models alongside its existing engagements.

"And as far as who's actually investing and putting money in, they have Nvidia, of course, why would Nvidia not put money into a $2 billion, an $8 billion company that's taken in $2 billion that inevitably is going to have to spend most of that on Nvidia GPU chips."

1314. AI HR

Episode: $2B Boost: Reflection AI Takes Aim at DeepSeek
Date: 2025-10-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast briefly mentions NVIDIA as an investor in Reflection AI, a company raising significant funding to potentially spend on NVIDIA GPU chips, highlighting NVIDIA's strategic investment in the AI ecosystem. However, there is no direct discussion of Jensen Huang's views or NVIDIA's AI strategy, supply chain, or competition.

"As far as who's actually investing and putting money in, they have NVIDIA, of course. Why would NVIDIA not put money into a $2 billion, you know, an $8 billion company that's taken in $2 billion that inevitably is going to have to spend most of that on NVIDIA GPU chips."

1315. Bloomberg Intelligence

Episode: US Banks Finance Their Own Competition, 25% Auto Tariffs
Date: 2025-03-27 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]()
Summary: The podcast discusses AI demand driving data center growth and mentions NVIDIA GPUs being used by a customer for drug discovery, highlighting AI's impact on accelerating therapeutics. However, the focus is mainly on data centers and real estate rather than an in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.

"You look at a company like Bristol-Myers Squibb, a customer of ours, they're doing drug discovery using NVIDIA GPUs and like being able to increase and accelerate their time to therapeutics."

1316. RiskReversal Pod

Episode: Exploring China's Digital Belt & Road with Louis-Vincent Gave
Date: 2025-09-24 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: This podcast episode includes discussion about the growing competitiveness between U.S. technology companies, including NVIDIA, and Chinese technology companies, with mention of NVIDIA's challenges in selling high-end GPUs to China. However, the discussion is broad and more focused on geopolitical and trade contexts rather than detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"We can discuss this. Because I do think that there is a seminal change going on in the world that as dominant as the U.S. is, we now have a sort of a counterpart that we're going to compete with."

1317. Tech News Daily

Episode: Cyber Attack Exposes Legal Data, Apple Lets EU Users Swap Siri, Microsoft Launches NLWeb AI, Trump Lands Major AI Chip Deals, and more...
Date: 2025-05-20 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions multi-billion-dollar AI chip deals involving NVIDIA as part of a broader discussion on AI technology and competition between the U.S. and China. There is no in-depth discussion about Jensen Huang or NVIDIA's AI strategy, supply chain, or competition specifically.

"President Donald Trump's recent golf tour has resulted in substantial AI technology deals, including partnerships with chipmakers NVIDIA and AMD, as well as a new Saudi AI company named Humane."

1318. Bloomberg Talks

Episode: Dan Ives Talks Apple's "BlackBerry Moment"
Date: 2025-08-11 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mention references NVIDIA as a key player in the U.S.-China trade negotiations around chips and AI, placing Jensen Huang as a 'godfather of AI' amidst competition in the AI space. However, the discussion centers mostly on Apple's position and moves rather than NVIDIA's detailed strategy, supply chain, or competition.

"You look at wartime CEOs, look at Zuck, look at Musk, look at Nadella, look at godfather of AI, Jensen, NVIDIA."

1319. Derisky Business

Episode: Selling H20 Chips to China Will Come at a Cost, with Liza Tobin
Date: 2025-08-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode discusses recent U.S. export control policy changes allowing NVIDIA and AMD to sell AI chips to China under certain conditions, considering the implications for U.S. national security and the AI competition with China. NVIDIA is mentioned as a financial supporter of the Center for a New American Security but the discussion does not focus deeply on NVIDIA's internal strategies or statements from Jensen Huang.

"The Trump administration has announced a new policy that will allow NVIDIA and AMD to gain a license to sell certain controlled chips into China, so long as the two companies agree to pay 15% of the revenue from these sales back to the U.S. government."

1320. Schwab Network

Episode: ORCL Earnings: AI Demand and Cloud Competition in Focus
Date: 2025-09-09 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly references NVIDIA's AI capital expenditure projections based on commentary by Colette Kress, highlighting the expected growth in AI infrastructure spending and related investment opportunities.

"if you listen to, by the way, what Colette Kress from NVIDIA said on their conference call, they're talking about three to four trillion in total AI CapEx by end of decade."

1321. Tech News Daily

Episode: OpenAI Unveils GPT-5 Model, Adobe Launches Firefly Video Model, Apple Launches iPhone SE 4, Apple TV App Launches on Android, and more...
Date: 2025-02-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA adjusting its RTX 5070 release to early March 2025 in response to AMD's upcoming Radeon RX 9070 launch, indicating some competitive dynamics in the GPU market.

"Nvidia is adjusting its release schedule for the RTX 5070, now expected to launch in early March 2025 instead of February."

1322. Closing Bell

Episode: Closing Bell Overtime: Fed Decision, Oracle Earnings Loom 12/9/25
Date: 2025-12-09 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's stock performance and the recent approval to sell its H200 chips to China amidst broader market and tech sector updates, including competitive context from Broadcom and developments in AI models from other companies.

"NVIDIA falling despite getting approval to sell its H200 chips to China."

1323. Merryn Talks Money

Episode: Rob Arnott on AI Mania: Lessons From the Dot-Com Era
Date: 2025-11-03 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA primarily in the context of its stock performance and growth prospects in AI, referencing the company's optimism about AI's potential to grow significantly. However, the discussion is more about general AI industry trends and resembles a brief mention rather than a focused discussion on NVIDIA's AI strategy or supply chain.

"This is exactly the kind of thing that we hear from NVIDIA, which, by the way, as we're speaking, has been hitting new highs. Exactly the kind of thing we hear from them that this growth can go on indefinitely."

1324. The John Batchelor Show

Episode: PRC: Trump administration changes course on Nvidia to Beijing. Josh Rogin, WaPo continued
Date: 2025-08-19 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses U.S. government export restrictions affecting companies like Nvidia, highlighting concerns about regulatory changes and the need for companies to proactively prepare for potential challenges related to China and technology exports.

"Anyone who is in an export technology controlled environment, restrictions by the U.S. government because of security or because of patents or because of doubts about your money source, all of that, that has governors in the world."

1325. Rob Black Show

Episode: Markets Set to Snap Losing Streak
Date: 2025-02-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's upcoming earnings report in the context of AI stocks and compares it favorably to Tesla, highlighting the host's long-term ownership and positive attitude towards NVIDIA's prospects. However, there is no detailed discussion on NVIDIA's AI strategy, supply chain, or competition.

""There's a lot going on today. The market's trying to snap a losing streak. NVIDIA's gonna report tonight... I'd rather own NVIDIA.""

1326. FLYTECH DAILY

Episode: iPhone Goes Ultra Thin, Siri Gets Smarter, NVIDIA Flexes, Microsoft Builds AI Coworkers
Date: 2025-05-19 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly covers NVIDIA CEO Jensen Huang's announcements at Computex, mentioning a new technology stack for AI that encompasses hardware and tools to support AI workloads. However, the mention is brief and lacks detailed insights into NVIDIA's AI strategy, supply chain, or competitive positioning.

"NVIDIA CEO took over Computex with a bunch of big announcements, including a new tech stack, which basically is all the tools and hardware that make AI work."

1327. The Peak Daily

Episode: Sell sell sell - AI agents spark software sell-off, Ottawa and Washington talk critical minerals.
Date: 2026-02-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang's dismissal of fears that AI agents could replace software providers, but the discussion primarily centers on broader AI market impacts and industry sell-offs.

"NVIDIA CEO Jensen Huang came out and said that the fear of total replacement of software by AI agents was, quote, illogical."

1328. All Things Policy

Episode: US's Plans To Sell H200 Chips To China
Date: 2025-12-29 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses US export controls on AI chips, specifically GPUs, including NVIDIA's GPUs, in relation to their use in China and geopolitical considerations around AI technology control.

"We recently heard the news that Trump wants to allow NVIDIA to sell GPUs to China again and we thought this is the perfect time to record a podcast and take an overview of the whole situation."

1329. World Today

Episode: How U.S. efforts to shut out Chinese chips spark its own downfall?
Date: 2025-05-21 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's CEO Jensen Huang criticizing U.S. export restrictions on Chinese chips, stating these policies have backfired and harmed American businesses while failing to stop China's tech progress. The discussion centers around geopolitical tensions in the semiconductor industry but offers limited detail on NVIDIA's AI strategy, supply chain, or competition.

"At the same time, the CEO of U.S. chip giant NVIDIA, Jensen Huang, has again publicly condemned the policy as a failure. He said

Washington's export restrictions have backfired and cost American businesses billions while failing to halt China's tech progress."

1330. Breaking News | Latest Episodes

Episode: Closing Bell Overtime: Nvidia Earnings From Every Angle, Plus Results From Salesforce, Snowflake 2/26/25
Date: 2025-02-26 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA in the context of its earnings report and its significance in the AI sector, highlighting market volatility and the stock's reaction to guidance changes. The discussion centers on market impacts without in-depth analysis of NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA being 6 percent of the S&P 500. It has everybody on edge."

1331. The Quantum AI Digest

Episode: The Quantum AI Digest: 2 August 2025 Daily Dispatch
Date: 2025-08-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA primarily in the context of OpenAI's investment in NVIDIA GPUs for GPT-5 development and a dispute involving China's cyberspace regulator accusing NVIDIA of backdoors in its H21 chips, which NVIDIA denies. There is no direct discussion of Jensen Huang or NVIDIA's AI strategy or supply chain.
"The funds will buy tens of thousands of NVIDIA H200 GPUs for GPT-5 development, with long-term capacity deals offering discounts."

1332. World Insight with Tian Wei

Episode: Interpreting Chinese foreign minister's statements
Date: 2025-03-08 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode includes a discussion referencing Jensen Huang and Nvidia in the context of a new industrial revolution driven by AI, highlighting Nvidia's rapid growth and importance in technology developments amid geopolitical and technological competition. There is a general positive view on Nvidia's role in AI and innovation but no detailed discussion of supply chain or competitive strategy.
"In fact, we're now, if you believe Jensen and Nvidia, we're undergoing a second industrial revolution, a new industrial revolution with AI."

1333. Dragon's Code: America Under Cyber Siege

Episode: Dragon's Code: China Hacks America! NSA Secrets, Spy Games, and Cyber Showdowns
Date: 2025-10-12 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA's Jensen Huang warning about the narrowing gap in semiconductor and AI hardware between the US and China and the complexities of decisions around export bans, emphasizing the need for advanced defensive technologies.
"Cyber pros, like NVIDIA's Jensen Huang, are sounding the alarm too. He said on the BG2 tech podcast that the gap in semiconductor and AI hardware between the US and China is now down to just nanoseconds, warning decisions about export bans are double-edged swords."

1334. Morning Brief

Episode: Fed decision day, China bans Nvidia chips, Trump in UK
Date: 2025-09-17 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses China banning companies like Alibaba and ByteDance from purchasing Nvidia's AI chips, highlighting increased U.S.-China trade tensions that may impact Nvidia's business. The mention is brief and focused mainly on the trade implications rather than Nvidia's strategy or competition.
"China reportedly banning companies from purchasing Nvidia's AI chips."

1335. TechCheck

Episode: Gulf nations' new role in AI race 5/12/25
Date: 2025-05-12 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Jensen Huang's planned attendance at the Saudi U.S. Investment Forum amid Gulf nations' ambitions to play a role in AI. It highlights geopolitical and trade implications around semiconductor supply and AI partnerships affecting NVIDIA, but does not delve specifically into NVIDIA's AI strategy, supply chain, or competition.
"Jensen Huang, Ruth Porat, Alex Karp, they are on the agenda for the Saudi U.S. Investment Forum in Riyadh."

1336. AI in Flow

Episode: AI on the World Stage: Tech Deals, Global Investments, and Smart Cities
Date: 2025-09-14 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA's Jensen Huang as part of a US-UK tech delegation focusing on AI, chip supply chain resilience, and joint research, indicating a significant collaboration in tech and AI initiatives. However, the discussion is brief and part of a broader conversation about global tech developments and investments.

"NVIDIA's Jensen Huang and OpenAI Sam Altman are actually part of the delegation. So this is a serious alignment of two very powerful tech ecosystems."

1337. (Audio)NEWS/VIEWS/NOVELS

Episode: Tariffs Aim to Boost Military, AI Manufacturing-Not T-Shirts: Trump
Date: 2025-05-26 | Relevance: 40/100 | Source: SourceSignal.insider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang praised U.S. presidential initiatives aimed at boosting American technology and AI leadership, expressing support for efforts to enhance domestic manufacturing and global competitiveness in semiconductor chips.

"The president would like American technology to win with NVIDIA and American companies to sell chips all over the world and to generate revenues, tax revenues, invest, and build in the United States."

1338. Bloomberg Tech

Episode: Altman Meets with Mideast Investors as OpenAI Eyes $830 Valuation
Date: 2026-01-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast excerpt briefly mentions NVIDIA and Jensen Huang in the context of AI data center spending and chip demand, highlighting bullish outlooks on AI investment. However, it does not delve deeply into NVIDIA's AI strategy, supply chain, or competition.

"the narrative is all around NVIDIA and Jensen Huang being bullish once again on the trillion dollars of spending that's going to be going into the idea of AI data centers, the need for chips."

1339. CNBC's "Money Movers"

Episode: Venezuela's Maduro to be Arraigned, Implications for Oil, Chinese AI IPO Pipeline 1/5/26
Date: 2026-01-05 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mention previews NVIDIA CEO Jensen Huang's upcoming keynote at CES, discussing expectations of his focus on AI demand and its impact on earnings forecasts but provides no detailed insights. The mention frames Jensen's speech as significant for setting technology trends for the year ahead.

"Jensen speaking today at 4 p.m. has kind of been on everyone's calendar for the better part of the past, you know, four to six weeks. And I think he's going to kind of reinforce what we've been learning over the past month or so, that AI demand is really more robust than people thought."

1340. Daily Tech Headlines

Episode: Meta Is Launching Its AI Chatbot In Europe - DTH
Date: 2025-03-20 | Relevance: 40/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: NVIDIA CEO Jensen Huang commented on rumors about a consortium to acquire Intel, denying involvement and stating NVIDIA has not been approached for a stake purchase. No detailed insights into NVIDIA's AI strategy, supply chain, or competition were provided in the podcast mention.

"nobody invited me"

1341. AI News Daily

Episode: OpenAI Unveils GPT-5 Model, Adobe Launches Firefly Video Model, Musk's $97.4B OpenAI Bid Sparks Legal Battle, Scarlett Johansson Criticizes AI Deepfake, and more...
Date: 2025-02-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: NVIDIA's Jensen Huang is mentioned as highlighting a shift towards autonomous agents in AI, indicating the company's interest in evolving AI strategies beyond large language models. However, the discussion is brief and lacks detailed information on NVIDIA's AI strategy, supply chain, or competition.

"Industry leaders, including Salesforce's Mark Benioff and NVIDIA's Jensen Huang, have highlighted a shift towards autonomous agents in AI, signaling a move beyond traditional large language models."

1342. The MadTech Podcast

Episode: MadTech Daily: Google Introduces New AI Commerce Standard; Nvidia Appoints First-Ever CMO; Trump Pushes Back on Netflix's Warner Bros. Acquisition
Date: 2026-01-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions Nvidia's appointment of its first-ever Chief Marketing Officer, Alison Wagenfeld, reporting directly to CEO Jensen Huang, aiming to strengthen the brand amid AI-driven growth. There is no detailed discussion of Nvidia's AI strategy, supply chain, or competition.

"Nvidia has appointed its first Chief Marketing Officer. Google Marketing Executive Alison Wagenfeld will take the role, reporting directly to CEO Jensen Huang."

1343. The Fat Pipe - Most Popular Packet Pushers Pods

Episode: NB544: NVIDIA Buys $5 Billion of Intel Stock; Netskope Rides SASE IPO to an $8.8 Billion Valuation
Date: 2025-09-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions NVIDIA in relation to its AI tool's remote code execution vulnerability and its recent investment in Intel, but lacks detailed discussion on NVIDIA's AI strategy, supply chain, or competition.

"There is a remote code execution in an AI tool from NVIDIA."

1344. Metamorphose 47

Episode: ATTENTION !!! Ca commence a sentir le roussi pour la Bourse !!!
Date: 2025-09-07 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's stock performance, noting a significant decline in its share price, along with mentioning Broadcom's strong AI-driven revenue growth as a competitor. However, there is little detail on NVIDIA's AI strategy, supply chain, or direct comments from Jensen Huang.

"Et saluons quand meme la performance du Nasdaq, malgre la chute d'Nvidia, tu vois, depuis fin aout."

1345. AI News Daily

Episode: Nvidia AI Sell-Off Sparks Interest, Intel Launches Xeon 6, Grok Sparks AI Neutrality Debate, Chegg Sues Google Over Antitrust, and more...
Date: 2025-02-25 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode includes a broad discussion of AI sector companies, mentioning Nvidia's recent share sell-off and their Blackwell GPUs in a new data center, but does not focus specifically on Jensen Huang's statements or Nvidia's AI strategy, supply chain, or competition in detail.

"In a related development, Nebius is expanding its operations in the U.S. with a new data center in Kansas City, equipped with Blackwell GPUs."

1346. Schwab Network

Episode: Mag 7's "Commitment" to Data Centers & GOOGL "Existential Crisis"
Date: 2026-02-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses broader AI spending trends among major tech companies, including Nvidia, with a focus on AI chip purchases and data center connectivity, but does not provide detailed insights into Nvidia's AI strategy, supply chain, or competition.

"Maybe there's going to be some AMD mixed in with all that Nvidia. And maybe there's going to be some micron surrounding the Nvidia and AMD chips."

1347. Roaring Elephant

Episode: Episode 440- Deep Seek Changed AI Forever!
Date: 2025-02-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a recent development by a Chinese AI company DeepSeq, comparing its generative AI product to NVIDIA's hardware and performance benchmarks, noting some skepticism about the claims regarding hardware usage and efficiency.

"all of a sudden, even without access to NVIDIA's flashiest, most expensive and most power-hungry hardware, was able to suddenly, in a much more efficient way, cost-effective way, deliver some pretty amazing results and benchmarks."

1348. The Joseph Carlson Show

Episode: I Ranked The Moat Of Popular Stocks
Date: 2025-09-08 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly compares AMD and NVIDIA, highlighting NVIDIA's stronger ecosystem and software (CUDA) as a moat, but does not provide detailed insights into Jensen Huang's AI strategy or supply chain. It offers a general overview of NVIDIA's

competitive advantage relative to AMD.

"One of the critical things that AMD lacks that NVIDIA has is this whole ecosystem. NVIDIA has CUDA, the code and the ecosystem, the software that supports all their products."

1349. Untitled Linux Show (Audio)

Episode: ULS 193: Unrolled My Fruit Loops - GPUs, EntrySign, and Linux on Android

Date: 2025-03-09 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast episode briefly discusses recent Nvidia GPU releases, including the GeForce RTX 5070 and 5070 Ti, focusing on their availability and benchmarking in the context of Linux compatibility. There is no discussion of Jensen Huang's statements or detailed analysis of Nvidia's AI strategy, supply chain, or competition.

""It's been an exciting week for graphic card releases with multiple cards from both Nvidia and AMD launching just a couple of days apart.""

1350. Off The Console

Episode: Framework's Steam Machine + NEXT FEST | OTC EP 19

Date: 2025-03-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed

Listen to Episode

Summary: The speakers discuss the pricing and competitiveness of NVIDIA GPUs, comparing them with AMD's offerings and noting NVIDIA's strategy of limiting GPU availability to maintain higher prices. There is also commentary on gaming performance and market dynamics between NVIDIA and AMD.

"I believe the 9070 XT will be out of stock and that the 9070 will be the only thing in stock so I mean I guess it's a fair point given how GP but that's more of Nvidia's playbook they like to make GPUs scarce so they can justify the prices."

1351. Tech&Co, la quotidienne

Episode: Puces : Nvidia signe avec Groq pour 20 milliards de dollars - 05/01

Date: 2026-01-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses Nvidia's non-exclusive licensing agreement with AI startup Groq, highlighting Groq's technology and its role in accelerating AI inference. However, there is no direct mention of Jensen Huang or detailed insights into Nvidia's AI strategy, supply chain, or competitive positioning.

"Grock, le specialiste de l'Inferencia, a signe donc un accord de licence non exclusif avec Nvidia sur sa technologie."

1352. Finnomena Podcast

Episode: "" Morning Brief 19/09/2025

Date: 2025-09-19 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive

Listen to Episode

Summary: The podcast briefly discusses NVIDIA's recent $5 billion investment in Intel for chip development collaboration, which has positively influenced stock prices and market sentiment around technology and AI sectors.

"Nvidia has announced it will invest $5 billion in Intel under an agreement to jointly develop chips for data centers and personal computers."

1353. Broken Silicon

Episode: 312. RX 9090 XT 32GB, RX 9060 XT 16GB Review, XBOX Handheld, AMD Zen 5 Threadripper

Date: 2025-06-03 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast episode primarily discusses AMD's upcoming GPU developments and potential competitiveness with NVIDIA's 5080 and 5090 series. There is some mention of NVIDIA's cards for comparison but no direct discussion on NVIDIA's AI strategy, supply chain, or competition from Jensen Huang.

"this could provide a significant supply advantage to AMD over NVIDIA in this market that Team Green has all but completely abandoned."

1354. Drak Spartan Podcast

Episode: El Flush :Las GPUs se derriten,la IA no siente y Trump quiere todos los chips El apocalipsis gamer

Date: 2025-11-08 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses the rising cost of semiconductor manufacturing with increased demand driven by AI, mentions Nvidia in the context of competition alongside Intel against AMD, and touches on GPU hardware trends for 2026. However, it lacks detailed or direct insights from Nvidia insiders about AI strategy or supply chain specifics.

"AMD, aceptando que Nvidia e Intel se unieron como Thanos y Ultron para darle la madre a su negocio."

1355. The Fat Pipe - Most Popular Packet Pushers Pods

Episode: NB537: Palo Alto Networks IDs New Market With $25 Billion CyberArk Buy; Intel to Shed Networking Biz
Date: 2025-08-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Intel's strategic moves in the AI and networking markets and acknowledges NVIDIA's dominant position in AI chips, describing Intel and others as competitors but without deep analysis of NVIDIA's AI strategy or Jensen Huang's commentary.
"And everybody is competing against NVIDIA right now. Yeah, right. The problem is that how are you going to attack that? Because NVIDIA is in a position in the AI market where Intel was in the desktop chip market just less than a decade ago."

1356. The Everything Feed - All Packet Pushers Pods

Episode: 0804 NB537:
Date: 2025-08-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA as the primary competitor in the AI chip market, noting Intel's challenges in catching up. There is general recognition of NVIDIA's leading position but no direct quotes from Jensen Huang or detailed discussion on NVIDIA's AI strategy, supply chain, or competition.
"Intel is competing against AMD, Qualcomm, and NVIDIA. That's right. You are correct. NVIDIA. And everybody's competing against NVIDIA right now."

1357. The Everything Feed - All Packet Pushers Pods

Episode: 0804 NB537:
Date: 2025-08-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Intel's strategic moves and acknowledges NVIDIA as a leading competitor in the AI chip market, comparing Intel's challenge to AMD's position against NVIDIA but does not delve deeply into NVIDIA's specific AI strategy, supply chain, or competitive tactics.
"Intel is competing against AMD, Qualcomm, and NVIDIA. That's right. You are correct. NVIDIA. And everybody's competing against NVIDIA right now."

1358. Market Mondays

Episode: Nvidia's $100B OpenAI Deal, Trump's H-1B Visa War, Disney's Kimmel Saga, & Apple's Big Comeback
Date: 2025-09-23 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA in relation to Intel's investment in a struggling chipmaker as a strategic hedge for NVIDIA to maintain its lead. The speaker expresses views positioning NVIDIA as a superior chipmaker compared to Intel and AMD but offers limited detail on NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA's business is to make sure that they are operating at the highest level. And one way to do that is to build a moat."

1359. TechLinked

Episode: Microsoft scared of AI, GPD Win 5 price/perf, iPhone 17 'Scratchgate' + more!
Date: 2025-09-23 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang confirming details about NVIDIA's ARM-based PC processor and AI PC SoC, noting the combination of NVIDIA's GPU with Mediatek's ARM CPU cores and comparing it with Intel CPUs integrated with NVIDIA GPUs. The discussion is speculative and brief without deep analysis of AI strategy, supply chain, or competition.
"NVIDIA CEO Jensen Huang confirmed on his joint investor call with Intel last week that NVIDIA's rumored N1 ARM-based PC processor and the GB10 SoC powering the company's DGX Spark Mini AI PCs that are already announced are actually one in the same."

1360. Schwab Market Update Audio

Episode: Data Outage a Headwind, with AMD Results Due Later
Date: 2026-02-03 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's stock decline after media reports questioned its $100 billion deal with OpenAI, and notes CEO Jensen Huang's denial of dissatisfaction with OpenAI. No detailed discussion on NVIDIA's AI strategy, supply chain, or competition is provided.
"NVIDIA's CEO Jensen Huang over the weekend denied reports he was unhappy with OpenAI."

1361. Squawk on the Street

Episode: More Software Selling, AMD CEO Live, & Cramer's Earnings Takeaways 2/4/26
Date: 2026-02-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang's comments on NVIDIA's investment plan in OpenAI were mentioned briefly, indicating the plan is on track with no drama, amid broader tech sector discussions including AI's impact on software stocks and AMD's forecast miss.

"Jensen Wong speaking with our Jim Cramer, saying NVIDIA's plan to invest in OpenAI remains, quote, on track and that there is no drama with OpenAI."

1362. Closing Bell

Episode: Markets Hit Record Highs as Tech Reshapes and AI Expands 10/28/25
Date: 2025-10-28 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's recent activities, including a conference in Washington, collaboration with Palantir and Lowe's on AI and supply chain logistics, and a significant investment into Nokia. They also mention that NVIDIA CEO Jensen Huang will speak later in the show.
"NVIDIA is in focus as it holds a conference in Washington today, teaming up with Palantir to operationalize AI. Also working with Lowe's on supply chain logistics and investing a billion bucks into Nokia, sending that stock soaring. We're going to hear from NVIDIA CEO Jensen Huang coming up."

1363. Better Offline

Episode: The Case Against Generative AI (Part 2)
Date: 2025-10-01 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast episode discusses skepticism about the AI industry, highlighting NVIDIA's role alongside OpenAI as central players allegedly creating an illusion of activity and growth amid an AI bubble. The tone is critical, questioning the sustainability and reliability of the AI growth story tied to companies like NVIDIA.
"This industry is effectively in service of two companies, OpenAI and NVIDIA, who pump headlines out through endless contracts between them, or subsidiaries, or investments, to give the illusion of activity."

1364. Briefly Informed

Episode: Episode: Wed, 07 Jan 2026 06:04:52 PST
Date: 2026-01-07 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA unveiling new self-driving car technology and AI chips, with CEO Jensen Huang highlighting it as a significant advancement comparable to 'ChatGPT moment' for physical AI, indicating NVIDIA's push into AI applications and competition with Tesla's FSD.
"CEO Jensen Huang touting it as a, Chad GPT moment for physical AI, and a direct rival to Tesla's full self-driving system."

1365. Primer Click

Episode: Especial: Acciones IA-dudas y oportunidades
Date: 2026-02-06 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the broader AI and technology stock environment, including mentions of NVIDIA as part of the 'big seven' tech companies, and debates contrasting views on AI investment and its market impact.
"Siempre estas escuchando de NVIDIA, quizas de TSMC, pero siempre como de las siete magnificas, pero de repente veniamos como la inteligencia artificial es el impulso y ahora la inteligencia artificial es la amenaza."

1366. pplpod

Episode: Lisa Su: Architect of the Modern Semiconductor Era
Date: 2026-01-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode primarily focuses on Lisa Su and AMD, but mentions that Jensen Huang, NVIDIA's CEO, is Lisa Su's first cousin, highlighting the family connection amid competition in the semiconductor industry. It touches on the rivalry between AMD and NVIDIA and the broader AI infrastructure role of their companies.
""Nvidia co-founder and CEO Jensen Huang is her first cousin.""

1367. Power Lunch

Episode: Software Sell-Off Continues 2/4/26
Date: 2026-02-04 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA's CEO Jensen Huang commenting on AI's impact on software companies, expressing skepticism about AI replacing software firms amidst a software sell-off. The discussion is brief and focuses on Huang's view amid market reactions, with an analyst providing context on software stocks' valuation.
"There's a whole bunch of software companies whose stock prices are under a lot of pressure because somehow AI is going to replace them. It is the most illogical thing in the world, and time will prove itself."

1368. Wall Street mit Markus Koch - featured by Handelsblatt

Episode: KI bleibt ON FIRE | Delta Air profitiert von Ergebnissen
Date: 2025-10-09 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast discusses the strong performance and stock gains of NVIDIA driven by fundamental growth in revenue and earnings amid the current AI and tech rally. However, there is no direct discussion or quotes from Jensen Huang or detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"Die Aktien von AMD konnten jetzt seit Montag 45% zulegen, heute morgen erneut im Plus. Nvidia kann die Gewinne ebenfalls ausbauen."

1369. Worldwide Exchange

Episode: Worldwide Exchange 5/29/25
Date: 2025-05-29 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly discusses NVIDIA's strong earnings report with revenue and EPS beating estimates, driven by significant growth in data center and automotive/robotics revenue, boosting investor confidence in their AI-related business. There's also mention of NVIDIA's shift from a chip to a systems and infrastructure company.

"We used to be a chip company, and then we became a systems company. And Jim, you know now, we're an entire infrastructure company."

1370. chAIn

Episode: U.S. Orders, Meta Megaclusters & China's Global Push - 27.7.2025
Date: 2025-07-27 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: Jensen Huang, NVIDIA's CEO, is mentioned briefly discussing AI's potential to create wealth by empowering small teams and individuals. The podcast covers broader AI industry topics with a passing mention of NVIDIA.

"Nvidia's CEO Jensen Huang expressed his belief that AI has the potential to create more millionaires than the Internet by empowering individuals and small teams to launch billion-dollar enterprises."

1371. NetWorth Radio

Episode: 2026 Allocation Strategy?
Date: 2025-11-14 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses Michael Burry's bearish views on NVIDIA, focusing on concerns about the company's depreciation schedules potentially overstating earnings. There is skepticism about the accuracy of EBITDA measures and the financial reporting methods used by NVIDIA.

"Michael Burry came out on X Twitter and it's like, hey, I'm taking bearish bets on Meta and NVIDIA and a couple other companies. And he's saying if you look at their depreciation schedules, they've stretched them out longer than the actual life of the things that they're depreciating."

1372. Neural Newscast

Episode: Prime Cyber Insights: The Apple Supply Chain Breach and the MITRE EMB3D Frontier
Date: 2026-01-23 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses a supply chain breach at Luxshare Precision Industry, a key manufacturing partner for NVIDIA among other tech giants, highlighting risks to NVIDIA's intellectual property due to the theft of sensitive engineering data. However, it does not detail Jensen Huang's comments or NVIDIA's AI strategy, supply chain management, or competitive standing.

"If these archives contain research and development data from Apple and NVIDIA as alleged, the intellectual property implications are staggering."

1373. Behind the Markets Podcast

Episode: AI and National Security live from DC
Date: 2025-06-06 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses semiconductor manufacturing and government initiatives like the CHIPS Act, mentioning NVIDIA's chip production nodes but focusing mainly on industry-wide supply chain and technology node topics rather than NVIDIA's AI strategy or competition.

"NVIDIA chips don't use three nanometer, right? They use five. And next year they'll start using three as some companies start using two, right? Just because they make really big chips that are more complicated."

1374. On Orbit

Episode: Space-Grade Innovation: The Evolution of Onboard Computing With Aethero CEO Edward Ge
Date: 2025-11-25 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The guest briefly mentions NVIDIA in the context of Moore's Law and computing advancements, imagining what it would be like if a Mars rover used an NVIDIA RTX 5090 GPU instead of outdated chips. However, there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"Imagine if the Mars rover, instead of using a chip from 1998, had an NVIDIA RTX 5090 GPU on it."

1375. Chip Stock Investor Podcast

Episode: Nvidia Partner Silicon Motion (SIMO): The Best Undervalued Chip Stock in 2026?
Date: 2026-01-21 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses Silicon Motion's role in the semiconductor supply chain and its connection to NVIDIA in the context of NAND flash controllers and the broader memory market. NVIDIA is mentioned as a relevant player but the focus remains largely on Silicon Motion and industry supply chain dynamics influenced by AI data center buildouts.

"The really exciting part of this business has to do a little bit with this little company that you may have heard of called NVIDIA."

1376. Bloomberg Tech

Episode: Nvidia Opens AI Ecosystem to Rivals, Apple's AI Struggles
Date: 2025-05-19 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast segment briefly mentions NVIDIA in the context of market volatility, AI infrastructure, and semiconductor sectors amidst economic and trade uncertainties. There is no direct coverage of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA has actually paired a lot of its decline from the open. It was down 2% at one point. NVIDIA is at the heart of the news cycle, and it's going to be at the heart of today's program as well with a lot of news out of Taiwan."

1377. Headline News

Episode: Israel to allow Syrian government forces limited access into Sweida
Date: 2025-07-18 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast mentions NVIDIA CEO Jensen Huang during his visit to Beijing for the China International Supply Chain Expo, highlighting China's commerce minister's positive remarks about cooperation with multinational companies including NVIDIA in AI and supply chain services.

"The Commerce Minister also met NVIDIA CEO Jensen Huang, who's been in Beijing to attend the China International Supply Chain Expo."

1378. AI Brief

Episode: EP 318 : China Closes AI Gap
Date: 2025-11-08 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast briefly references NVIDIA's CEO Jensen Huang commenting on China's AI progress relative to the US, specifically mentioning China being nanoseconds behind in AI. However, the discussion quickly shifts focus to a Chinese AI startup and other industry developments, with little in-depth analysis of NVIDIA's AI strategy, supply chain, or competitive positioning.

"I want to start with something NVIDIA's CEO, Jensen Huang, said. He mentioned China being nanoseconds behind the US and AI."

1379. TraderMerlin

Episode: Trading Week Wrap Up! - 08/22/25
Date: 2025-08-22 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The speaker briefly mentions holding Nvidia calls and reflects on recent trading activity and options expiration, expressing optimism about recent price movements but no detailed discussion on NVIDIA's AI strategy, supply chain, or competition.

"So you can see the two positions on here for Nvidia. I have calls on Nvidia at $177.50, and as you can see, as it stands now, those will already be taken away, but those expire next Friday."

1380. Linux & Open Source News

Episode: Intel reconsiders Open Source, LibrePhone project, Ubuntu 25.10
Date: 2025-10-11 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast briefly compares NVIDIA and AMD GPUs in terms of performance and open source support, noting NVIDIA's technological lead but weaker open source contributions compared to AMD, and discusses Intel's evolving open source strategy with potential implications for Linux ecosystems.

"If Intel shuts the door on open source, they might also shut the door on a lot of Linux usage, and that doesn't sound good at all."

1381. CNBC's "Fast Money"

Episode: Microsoft's AI Pullback... And Intel's Semi Shift 7/2/25
Date: 2025-07-02 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast segment discusses Microsoft's AI chip development pullback, which implies Microsoft will continue to source AI server chips from NVIDIA, reinforcing NVIDIA's role as a key AI chip supplier. NVIDIA is also noted to be approaching a $4 trillion market cap.
"Microsoft, which, by the way, is one of NVIDIA's top customers, it's slowing down plans for its own AI chip... this pretty much guarantees that NVIDIA is going to have Microsoft as a customer for some time now."

1382. The Exchange

Episode: OpenAI's Make or Break Year, Intel Interrupted, and Blizzard Bracing 1/23/26
Date: 2026-01-23 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's share performance and Jensen Huang's upcoming trip to China related to H200 chip orders, but primarily focuses on AI market dynamics and competitor analysis involving OpenAI, Microsoft, and Google.
"NVIDIA shares up a percent as Jensen Huang is reportedly traveling to China next week, with the country evidently telling its top tech firms to prep their H200 chip orders."

1383. The Full Nerd Podcast

Episode: Episode 366: Intel & Nvidia Alliance, Windows WinRing0 Alerts & More
Date: 2025-09-23 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions Intel and Nvidia's recent alliance, discussing some related industry news and context, but lacks detailed analysis or direct insights from Jensen Huang regarding Nvidia's AI strategy, supply chain, or competition.
"After many weeks of kind of, you know, a little bit slower of news after Computex, we just got a bombshell. Big old dump. Dropped on us."

1384. Closing Bell

Episode: Closing Bell Overtime: Nvidia Delivers 11/18/25
Date: 2025-11-19 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast includes a brief mention of NVIDIA's stock performance ahead of its earnings report, comparing it to AMD's stock performance amidst competitive AI chip developments, but lacks detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"The stock did trade higher by roughly three percent in today's trade. It's worth noting rival AMD, led by CEO Lisa Su, has seen its stock price fare better than Nvidia over a three-month time period on this growing optimism that its AI chip is becoming more competitive."

1385. Today, Explained

Episode: Trump's new billionaire bestie
Date: 2025-11-24 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's growth from a niche GPU maker to a key player in AI chip manufacturing, highlighting the stock market's sensitivity to NVIDIA's earnings and noting a relationship between CEO Jensen Huang and President Trump. However, it does not provide detailed discussion on NVIDIA's AI strategy, supply chain, or competition.
"In 2025, NVIDIA is still making chips, but now those chips are more advanced and they're being sold to people who are training AI models, your clouds and your chat GPTs."

1386. Bloomberg Talks

Episode: Sequoia Partner Konstantine Buhler Talks Agentic AI
Date: 2025-10-07 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions a conversation with NVIDIA CEO Jensen Huang about the company's relationship with OpenAI and the AI hardware powering the AI revolution. There is a mention of agentic AI and examples of AI security investments but limited specific insights on NVIDIA's AI strategy, supply chain, or competition.
"We were with Jensen Huang this morning and the relationship between NVIDIA and OpenAI goes back a long way."

1387. MRKT Matrix

Episode: Nvidia Fuels Another S&P 500 Record Close
Date: 2025-10-28 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's recent stock performance and a $1 billion investment in AI infrastructure via Nokia, as well as its valuation relative to other AI-related tech companies. However, it does not include commentary from Jensen Huang or detailed discussion on NVIDIA's AI strategy, supply chain, or competition.
"Nvidia led the gains with a 5% jump after unveiling a $1 billion investment in Nokia to expand AI infrastructure."

1388. AI Convo Cast

Episode: Google's New AI Booking Features and Nvidia's China AI Race Comments
Date: 2025-11-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang's comments on China winning the AI race, highlighting competitive dynamics in the AI industry. However, the discussion touches only lightly on NVIDIA's AI strategy without detailed insights or specifics.
"NVIDIA CEO Jensen Huang's striking comments about China winning the AI race."

1389. ChatGPT: News on Open AI, MidJourney, NVIDIA, Anthropic, Open Source LLMs, Machine Learning

Episode: OpenAI Scaling for the Next Billion Users
Date: 2025-10-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses NVIDIA's involvement in funding new Stargate data centers for OpenAI, highlighting NVIDIA's role without detailed insights into their AI strategy, supply chain, or competition. The focus is primarily on infrastructure projects rather than direct commentary from Jensen Huang.
"We're going to be breaking down everything that's going into this project, where they're getting the money from, the impact this has had on Oracle, how NVIDIA is helping to fund this, and a lot more."

1390. Byte Time

Episode: The Thinking War is On
Date: 2025-09-20 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses competition in the computing processor space, noting NVIDIA as a competitor to Intel along with AMD, highlighting Intel's missteps and the rising challenges from these companies, including in AI. However, NVIDIA is mentioned only in passing without detailed discussion on its AI strategy or supply chain.
"Competition. Real stiff competition and possibly even more from AMD and from NVIDIA."

1391. Drak Spartan Podcast

Episode: PUTISISIMO FLUSHHHHH Microsoft la caga, Nvidia manipula, AMD acecha y la IA china se estrella
Date: 2025-02-17 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
[Listen to Episode]()
Summary: The podcast discusses competition in the GPU market, mentioning Nvidia alongside AMD and Intel, particularly about upcoming AMD GPUs aiming to challenge Nvidia's RTX 5070. It also touches on ARM's entry into data center chips as competition to Nvidia.
"Probablemente con la esperanza de que Nvidia se tropiece y ellos puedan llegar con el golpe final."

1392. Broken Silicon

Episode: 308. AMD 9060 XT Release Date, RX 9070 GRE, Nvidia RTX 5080 SUPER 24GB, Gorgon Point
Date: 2025-05-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast episode briefly touches on upcoming NVIDIA product announcements around Computex, discussing release timing and some expected performance metrics of new GPUs. However, the mention is vague and mainly focused on schedule and general expectations rather than detailed AI strategy, supply chain, or competitive analysis.
"AMD should have a bunch of announcements, perhaps NVIDIA will. And that's also just so everybody knows, and we'll be getting back from a vacation."

1393. How to Trade Stocks and Options Podcast with OVTLYR Live

Episode: 16 Stocks With CRAZY Potential in October 2025
Date: 2025-10-14 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast briefly discusses NVIDIA, noting its bullish trend and buy signal amidst a declining tech sector, mentioning it as a potential leader once the market bottoms but with a cautious buy rating.
"NVIDIA is bucking the trend. It's still got a bullish trend here. It still has a buy signal. The fear and greed is actually still rising."

1394. Jump Podcast

Episode: Getting Fracked: How Even Great Businesses Fall Behind
Date: 2025-02-13 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of being challenged by a new AI competitor from China, similar to OpenAI, in the broader AI market. The discussion is general about the competitive landscape and does not deeply analyze NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA took a hit, Google, Microsoft, all of these folks have just gotten hit by this upstart out of China."

1395. Wake Up to Money

Episode: Nvidia keeps climbing
Date: 2025-11-20 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses Nvidia's ongoing sales strength and the absence of an AI bubble impact according to the company, but does not provide detailed coverage on Jensen Huang's views on AI strategy, supply chain, or competition.
"It's another bumper set of sales for the chip-making tech giant Nvidia, which doesn't see any signs of an AI bubble in its business."

1396. Primer Click

Episode: Especial: Nvidia y el rally de IA
Date: 2025-07-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast primarily discusses broader market and tariff issues, with a brief mention of Nvidia as a significant player in the recent AI rally, without specific details on Jensen Huang's statements or Nvidia's AI strategy, supply chain, or competition.
"...un especial de la semana conversamos de uno de los grandes protagonistas de los ultimos dias, Nvidia."

1397. The Dr Boyce Breakdown

Episode: Nvidia stock just exploded and why black people missed out
Date: 2025-11-01 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses the recent significant rise in NVIDIA's stock and briefly touches on reasons behind this surge. However, the mention is general and does not provide detailed insights into NVIDIA's AI strategy, supply chain, or competitive landscape.
"So mainly with Nvidia, oh my goodness, yeah, so Nvidia stock just blasted off like a rocket and what I'm going to do is tell you why"

1398. Bloomberg Daybreak: US Edition

Episode: Daybreak Holiday: Markets, Nvidia, Bitcoin
Date: 2025-05-26 | Relevance: 40/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly previews upcoming earnings and mentions Bloomberg Intelligence's Mandeep Singh will discuss NVIDIA, but contains no direct discussion from Jensen Huang or in-depth analysis about NVIDIA's AI strategy, supply chain, or competition.
"Up next, we're going to preview earnings. This week from NVIDIA, Bloomberg Intelligence Global Head of Tech Research, Mandeep Singh, will join us as this special Memorial Day edition of Bloomberg Daybreak continues."

1399. INI KOPER

Episode: #793 Jensen Huang: Sang Arsitek Peradaban AI
Date: 2026-01-10 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: This podcast episode discusses Jensen Huang's early life and character development as part of his journey to becoming NVIDIA's CEO, focusing on lessons of perseverance and vision rather than specific details about NVIDIA's AI strategy, supply chain, or competition.
"Di Dennis, dia belajar melayani semua jenis orang. Dari yang paling ramah sampai yang paling sulit. Dia belajar komunikasi, mengatasi rasa malunya. Oh, jadi soft skill-nya diasah di sana ya? Betul."

1400. The Jonathan Herzog Podcast

Episode: [MVP] An Ode to Jensen Huang
Date: 2025-07-24 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode celebrates NVIDIA's milestone of becoming the number two market cap company and reflects on Jensen Huang's career advice and leadership qualities. However, it contains limited discussion on NVIDIA's AI strategy, supply chain, or competition specifically.
"Congratulations to Jensen Huang and to NVIDIA, officially the number two market cap."

1401. Halftime Report

Episode: Brad Gerstner, Jensen Huang and Treasury Secretary Scott Bessent join us live 2/6/26
Date: 2026-02-06 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion briefly mentions NVIDIA's stock performance and upcoming interview with CEO Jensen Huang, but does not provide substantive details on NVIDIA's AI strategy, supply chain, or competition.
"And it has been a brutal week for many names, including NVIDIA, which was down about 10% over the last five days, though it is getting a very nice snapback today."

1402. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: EP 489: Operational Muscle: The Missing Key to Every Company's AI Strategy
Date: 2025-03-25 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode is recorded at NVIDIA GTC and discusses operational muscle as a key element in AI strategy, mentioning NVIDIA as a leading partner through Mark three systems. However, there is no direct discussion of Jensen Huang's comments on NVIDIA's AI strategy, supply chain, or competition.
"So Mark three, we're an NVIDIA lead partner and we specialize in working with large organizations, including Fortune 500 companies..."

1403. Tech Brew Ride Home

Episode: Is Jensen Worried About OpenAI?
Date: 2026-02-02 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's potential $100 billion investment in OpenAI and the skepticism around this move, but does not provide in-depth details or statements from Jensen Huang. The mention is brief and speculative regarding NVIDIA's AI strategy and partnerships.
"NVIDIA, you might recall, has plans to invest up to $100 billion in OpenAI. You might recall that was part of that sort of big announcement that people said at the time was sort of circular investing, a bit of paying Peter to pay Paul to pay Peter sort of deal."

1404. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: EP 484: The Next Frontier of Startups: Domain Experts in the Age of AI
Date: 2025-03-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: This podcast episode is a live broadcast from the NVIDIA GTC conference, discussing the rapidly evolving generative AI landscape and its impact on startups, venture capital, and business. While NVIDIA is a central backdrop for the conversation, there is no direct commentary from Jensen Huang on NVIDIA's AI strategy, supply chain, or competition in the provided excerpt.
"The eyes of not just the AI world and the tech world, but I think the eyes of the business world are on what's happening here at GTC."

1405. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: EP 483: Inside Apple's AI failures, Google and OpenAI asking feds for help on AI, NVIDIA GTC & more AI News That Matters
Date: 2025-03-17 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mention primarily promotes coverage of the NVIDIA GTC conference and notes a partnership with NVIDIA, but offers little detailed discussion about NVIDIA's AI strategy, supply chain, or competition.
"I am going to be live this week in San Jose, California at the NVIDIA GTC conference. So excited to partner with NVIDIA to bring you all a lot of exclusive insights you are literally not going to get anywhere else."

1406. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: EP 467: Transforming Supply Chains with AI - What's happening now and what's next
Date: 2025-02-21 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly references NVIDIA as a company partnering with the host to provide AI strategy education, but does not discuss Jensen Huang or NVIDIA's AI strategy, supply chain, or competition in depth.
"Companies like Adobe, Microsoft, and NVIDIA have partnered with us because they trust our expertise in educating the masses around generative AI to get ahead."

1407. The Exchange

Episode: Testing Troubles, Let's Go to the Mall, AI in Aisle Six 12/24/25
Date: 2025-12-24 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a recent report about Nvidia halting a test of Intel's manufacturing process for advanced chips, impacting Intel's stock price; the conversation focuses on Nvidia's chip trade activities and market movements but does not include direct commentary from Nvidia's executives or detailed insights into Nvidia's AI strategy, supply chain, or competition.
"Some big news this morning with Nvidia reportedly halting a test of Intel's manufacturing process to make advanced chips."

1408. Digest & Invest by eToro | Insights on Trading, Markets, Investing & Finance

Episode: MB245: Nvidia's Earnings, All You Need To Know
Date: 2025-05-28 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode focuses on NVIDIA's upcoming earnings announcement and sets the stage for a discussion, but the provided excerpt contains mostly introductory remarks with little substantive analysis or discussion of NVIDIA's AI strategy, supply chain, or competition.

"Today we will focus purely on NVIDIA. They've got their earnings coming out later tonight. It's the big one. It's the one you've all been waiting for."

1409. Mad Money w/ Jim Cramer

Episode: Mad Money w/ Jim Cramer 3/14/25
Date: 2025-03-14 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly mentions NVIDIA and its upcoming GTC event, describing NVIDIA as a favorite company of the host and referring to the event as the 'Woodstock of AI.' There is no detailed discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"On Tuesday, we're going all happiness. We're going to San Jose, California, to GTC, the All Things Generative AI Conference run by NVIDIA, long my favorite company."

1410. Mystery AI Hype Theater 3000

Episode: Wrapping Up a Hellish 2025, 2025.12.15
Date: 2026-01-13 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly references an article about Jensen Huang, CEO of NVIDIA, describing his demeanor before an interview related to AI leadership, but does not provide detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

""Jensen Huang needs a moment. The CEO of NVIDIA enters a cavernous studio at the company's Bay Area headquarters and hunches over a table, his head bowed.""

1411. The Six Five with Patrick Moorhead and Daniel Newman

Episode: EP 277: From Intel's Comeback to Meta's XR Vision - Tech's Pivotal Updates
Date: 2025-09-22 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly mentions NVIDIA in the context of a surprise announcement involving NVIDIA and Intel and discusses various AI and technology market updates. There is no detailed discussion about Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"We are going to spend some time on this NVIDIA thing. So many implications of this NVIDIA Intel announcement came out of the blue, surprised, I think, most people."

1412. The Windows Central Podcast

Episode: Microsoft needs to make wearable Copilot hardware to succeed in AI
Date: 2025-09-18 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions an Intel and NVIDIA partnership that could significantly impact laptops, but does not delve into details about NVIDIA's AI strategy, supply chain, or competition.

"Intel and NVIDIA are getting married apparently, so we'll talk about what that announcement means, which is actually a really, really big deal and it's going to change laptops in a lot of ways."

1413. Refresh Computers Tech Talk

Episode: 09-20-2025 The End of Intel As We Know It
Date: 2025-09-20 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA's 5% investment in Intel amidst Intel's struggles, highlighting NVIDIA's financial stake in the processor industry but without detailed commentary on NVIDIA's AI strategy, supply chain, or competition. The tone is neutral, reflecting on the technology sector changes and NVIDIA's involvement with Intel as a potentially positive move.

"NVIDIA, another big name in processors and tech development, actually purchased their own 5% stake into Intel."

1414. BinoshaCast |

Episode:
Date: 2025-05-12 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA in the context of GPUs and graphics technology, with some references to DLSS4, gaming hardware collaborations, and mentions of competition like Intel Arc. However, the discussion is fragmented and lacks clear insights about

NVIDIA's AI strategy, supply chain, or competition details as related to Jensen Huang's statements.

"DLSS4, FSR4 and XESS2 The system is based on the graphics After the graphics, it will be applied to the computer and the frame is higher."

1415. Broken Silicon

Episode: 335. Nvidia RTX 5080 SUPER Cancelled? AMD RX 9080 XT & RDNA 5 | Ancient Gameplays
Date: 2025-11-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode primarily discusses recent news and opinions about AMD and Nvidia, focusing on user reactions and preferences between the two companies rather than in-depth analysis of Nvidia's AI strategy or supply chain.

"Maybe I'm not buying AMD anymore. So maybe I'll just try to look into the future and look at NVIDIA in another way."

1416. Logically Answered

Episode: Everyone Is Laid Off - What Now? | Logically Answered
Date: 2025-07-05 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly mentions Nvidia's significant market cap gain during recent tech market challenges, highlighting its strong financial performance relative to layoffs in the tech sector. The discussion centers around broader tech industry trends rather than specific details of Nvidia's AI strategy, supply chain, or competitive positioning.

"And don't even get me started on Nvidia, they've literally gained a trillion dollars in market cap during supposedly one of the worst tech recessions in recent history."

1417. Becker Business Minute Podcast

Episode: Apple, NVIDIA & Palatnir 3-22-25
Date: 2025-03-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly touches on NVIDIA's market capitalization relative to Apple and Palatnir, noting recent declines but some recent rebound. There's no direct discussion of NVIDIA's AI strategy, supply chain, or competition from Jensen Huang or insiders.

"NVIDIA is number two in market cap at about 2.8 trillion, but it's also down year to date, now about 13% or so, 12.3% or so year to date, but some rebound lately."

1418. Becker Private Equity & Business Podcast

Episode: Apple, NVIDIA & Palatnir 3-22-25
Date: 2025-03-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's market capitalization, its year-to-date stock performance, and compares it to Apple and Palantnir. It notes NVIDIA as the second-largest market cap after Apple but does not delve deeply into NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA is number two in market cap at about 2.8 trillion, but it's also down year to date. Now about 13% or so, 12.3% or so year to date, but some rebound lately."

1419. Wall Street mit Markus Koch - featured by Handelsblatt

Episode: Bounce vom vorborslichen Tief | AI, die FED und Disney im Fokus
Date: 2026-02-02 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast briefly mentions a reported $100 billion OpenAI-Nvidia deal being on hold and Jensen Huang's criticisms of OpenAI's discipline and rising competition, but also notes Liu's subsequent retraction and uncertainty about the scale of Nvidia's financing. The discussion is limited and somewhat speculative.

"Jensen Wang kritisiert die mangelhafte Disziplin von OpenAI und den zunehmenden Wettbewerb, aber rudert hier allerdings zuruck und betont, dass diese Story in dieser Form nicht korrekt sei."

1420. A Podcast About AI

Episode: Cohere Hits $7B with AMD's Support
Date: 2025-09-27 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA mainly in the context of its investment in OpenAI and contrasts this with AMD's partnership with Cohere, highlighting competitive dynamics in AI GPU providers but with limited direct information about NVIDIA's AI strategy, supply chain, or competition.

"OpenAI just got a $100 billion investment from NVIDIA."

1421. Peter Pru | Option Sellers School

Episode: My Top 5 AI Wheel Strategy Stocks for This Week
Date: 2025-12-14 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The speaker mentions NVIDIA briefly, highlighting it as a significant player in the AI space and compares its stock setup favorably to AMD, but the discussion focuses on options trading strategies rather than NVIDIA's AI strategy, supply chain, or competition.
"Next one, obviously, I'm watching is NVIDIA, right? They're selling the shovels, right? Can't ignore that."

1422. The Technocrats

Episode: Tariffs, Trade & Technology: Preparing for Uncertainty in the Supply Chain with AI
Date: 2025-05-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses tariffs, trade, and supply chain challenges, referencing Nvidia in the context of reshoring and supply chain complexities related to China. There is no direct insight or detailed discussion of Nvidia's AI strategy or competition.
"...when it comes to the supply chain, it even after having Apple or Nvidia think about reshoring, it is very hard to decouple completely with China as well."

1423. Oceans: Life Under Water

Episode: NVIDIA just hit the $5 trillion milestone: who's paying the price? | Introducing SystemShift
Date: 2025-12-15 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses the environmental and social impacts of AI industry growth linked to companies like NVIDIA, focusing on supply chain and energy issues but does not provide detail on NVIDIA's AI strategy, supply chain management, or competition. The tone is critical of the costs borne by local communities and regions due to AI expansion.
"NVIDIA just hit the 5 trillion dollar milestone, who is paying the price?"

1424. Data Driven

Episode: Going From Spreadsheets to Smart Agents - Modernizing Supply Chain Intelligence
Date: 2025-11-19 | Relevance: 30/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses AI's impact on supply chains and touches on NVIDIA's market valuation and AI's broader industry importance, but it does not provide detailed insights into NVIDIA's AI strategy, supply chain management, or competition.
"My understanding at least when people talk about the bubble, they talk about the financial valuation bubble. Yes. So people will ask, okay, is Nvidia really worth five? Should it be worth $5 trillion? Yes or no."

1425. Side Notes by Zerodha Varsity

Episode: Semiconductor Chips - Moore's Law, TSMC, ASML, India's push for chips
Date: 2025-06-10 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Nvidia in the context of chip design and manufacturing, noting Nvidia outsources GPU chip production to TSMC. It discusses the broader semiconductor manufacturing ecosystem involving TSMC, ASML, and others but does not address Nvidia's AI strategy, supply chain specifics, or competition.
""Nvidia also outsources GPU chip manufacturing to TSMC.""

1426. Chain Reaction

Episode: The Boss, Tariffs, and Flying Taxis: How Trump's Policies Are Disrupting World Trade
Date: 2025-05-18 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the impact of tariffs on global supply chains, briefly mentioning NVIDIA in the context of manufacturing and supply chain uncertainty for their GB200 chip. It touches on geopolitical trade issues rather than NVIDIA's AI strategy or competition.
"They were also building a factory in Mexico to produce NVIDIA's GB200, bringing together different units of production to make superchips, the microchips that make our electronics work, but of course the out luck for them is not good and uncertain because of tariffs."

1427. VLC-Cinema:Documentaries and Movies + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor manufacturing landscape, briefly mentioning Nvidia as an example of a fabless manufacturer. It focuses more on industry structure and supply chain issues rather than detailed insights on Nvidia's AI strategy, supply chain, or competition.
"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1428. Stock Movers

Episode: AMD Sinks After Earnings; Paypal, Novo Nordisk Falls
Date: 2026-02-03 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.mixed
Listen to Episode
Summary: The podcast briefly discusses NVIDIA in the context of competition with AMD and mentions OpenAI's dissatisfaction with NVIDIA's latest AI chips, as well as NVIDIA's interest in participating in the OpenAI IPO. The focus is more on market movement and competitive positioning rather than detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"OpenAI just, you know, yesterday we got a report that it's unsatisfied with NVIDIA's latest AI chips and has sought alternatives since last year."

1429. Full Shard Podcast

Episode: Episode 6 - The Global AI War
Date: 2025-02-09 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt discusses AI development and market perspectives, with some mention of NVIDIA's market involvement and challenges, but does not provide direct insights from Jensen Huang or detailed information on NVIDIA's AI strategy, supply chain, or competition.

"the same companies, knowing that their angle with the being quant, quant and so forth, shorting with the maximum leverage NVIDIA and all the US companies, which actually that could be also very, very interesting."

1430. AI-Gen Daily: AI News by AI

Episode: AI News: OpenAI's $300B Valuation & RingCentral's AI Breakthrough | AI-Gen Daily
Date: 2025-02-21 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang explaining that despite concerns following DeepSeek's announcement, post-training AI requires significant computing power. It notes a stock dip but frames it as an overreaction by investors.

"Huang emphasized that post-training AI still needs serious computing power."

1431. ETF Spotlight

Episode: Humanoid Robot ETFs: Positioning for the Next Tech Revolution
Date: 2025-08-08 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast mentions Nvidia CEO Jensen Huang's view on physical AI as the next wave of AI and the expected adoption of humanoid robots in manufacturing within five years, positioning Nvidia as part of the humanoid robotics revolution. However, the discussion is mainly focused on humanoid robot ETFs and broad industry trends rather than detailed Nvidia-specific strategy.

"Nvidia CEO Jensen Huang has described physical AI as the next wave of AI. He believes that humanoid robots will be in wide use in manufacturing within less than five years."

1432. Keen On America

Episode: Huawei vs Ericsson: How Huawei Turned Sweden's "Neutral" Tech Advantage Into a Cold War Liability
Date: 2025-10-27 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA in the context of a Best Business Book about Jensen Huang and compares it to Huawei, highlighting their convergence as advanced AI chip makers amidst global competition. It does not provide deep analysis about NVIDIA's AI strategy, supply chain, or competition but offers a broad comparison with Huawei.

"Right now, both of them are two of the most advanced makers of AI chips in the world. Huawei is sort of the main Chinese competitor to NVIDIA amid this sort of arms race for AI chips around the world."

1433. : , ,

Episode: (iXBT Games) Microsoft Steam Nvidia (TikTok)
Date: 2025-11-03 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses Microsoft's plans for the next Xbox potentially threatening Nvidia's gaming GPU market, suggesting Nvidia's graphics cards may become less needed. However, the discussion is more speculative and based on third-party journalist views rather than direct statements from Jensen Huang or in-depth analysis of NVIDIA's AI strategy, supply chain, or competition.

"" , , Nvidia.""

1434. Campeones Financieros

Episode: 377. Invertir en el sector TECNOLOGICO? Te revelamos lo que nadie dice
Date: 2025-11-04 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the technology sector broadly, mentioning NVIDIA among other tech giants, noting its significant weight in tech-focused ETFs and indices, reflecting its market prominence. However, there is no detailed discussion on NVIDIA's AI strategy,

supply chain, or competition.

"Ahora la mas grande es NVIDIA, 14 por ciento de este indice, Microsoft 12 por ciento, Apple 12 por ciento."

1435. Untitled Linux Show (Video)

Episode: ULS 193: Unrolled My Fruit Loops - GPUs, EntrySign, and Linux on Android
Date: 2025-03-09 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions new NVIDIA GPU releases alongside AMD's, with some discussion around benchmarks and hardware availability from a Linux and open source perspective. However, there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition, nor any direct commentary from Jensen Huang.

"It's been an exciting week for graphic card releases with multiple cards from both Nvidia and AMD launching just a couple of days apart."

1436. BinoshaCast |

Episode:
Date: 2025-12-07 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The speaker mentions Nvidia in the context of AI and computing hardware, referencing its position relative to competitors like Google and OpenAI, but the discussion is fragmented and lacks depth about Nvidia's AI strategy, supply chain, or competition.

"Nvidia and the game is Nvidia AIA 2 graphic but it's a lot of weird and Google that has the thing trick is trick trick moon sorcerer yeah foreign concept play tp and go dollars."

1437. Talking Tech with SomeGadgetGuy (#SGGQA)

Episode: #SGGQA 405: Amazon Climate Goals, YouTubers Sued, AMD Crushing Intel, Vivo X300 Pro Leaks
Date: 2025-07-21 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's advantage in AI toolkits and GPU performance for AI compared to AMD, mentioning NVIDIA's focus on data centers and AI over gaming. The conversation highlights how NVIDIA's strong ecosystem encourages companies to adopt their GPUs for AI workloads.

"Nvidia is making the bigger AI plays like they don't really care about gamers they're making all their money on like data centers and crypto and AI so I don't think it's too surprising that they're putting out better resource materials and more powerful GPUs so that companies will buy tons of those Nvidia GPUs to use for AI."

1438. Windows Weekly (Audio)

Episode: WW 951: The ODBC of AI - Snapdragon X2 Elite Extreme Promises Blazing Speeds!
Date: 2025-09-24 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's $100 billion investment in OpenAI, characterizing it as a financial shell game without net gain, and discusses competitive dynamics involving Microsoft and Oracle. There is some skepticism about the strategic value of these financial maneuvers.

"Intel doesn't have $100 billion. Nvidia announced a $100 billion investment in open AI... It's just a shell game for tax purposes and to make your balance sheet look good."

1439. Brett Breaks Things

Episode: 12/16/25 Outrage, Misinformation, and State Capitalism
Date: 2025-12-16 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the political and regulatory environment affecting NVIDIA chip sales to China, highlighting changes under the Trump administration and new AI policy decisions that impact technology exports and competitiveness with China.

"I mentioned the NVIDIA chip sales to China. One of the victories, one of the becoming more frequent victories the tech bros, the tech industry, the AI industry is getting via the Trump administration."

1440. Better Offline

Episode: CZM Rewind: The Case Against Generative AI (Part 2)
Date: 2025-12-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast discusses the generative AI industry and mentions NVIDIA as one of the two main companies fueling the AI hype bubble, highlighting concerns about inflated valuations and unclear financial sustainability. However, it lacks specific insights into NVIDIA's AI strategy, supply chain, or competitive positioning from an insider perspective.

"This industry is effectively in service of two companies, OpenAI and NVIDIA, who pump headlines out through endless contracts between them or subsidiaries or investments to give the illusion of activity."

1441. The Rules of Investing

Episode: 10 years from now, these are the companies everyone will wish they owned - Livewire Live Mini-Series
Date: 2025-10-01 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly discusses NVIDIA's transformation from a mid-cap gaming company in 2015 to the largest NASDAQ stock by 2025, with investment professionals highlighting its market leadership and potential as a future mega-cap.
"In 2015, NVIDIA was a mid-cap gaming company few people were talking about. Today, it's the largest stock on the NASDAQ."

1442. Tech Brew Ride Home

Episode: Nvidia Back In China... Maybe
Date: 2025-12-09 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses recent news about the U.S. allowing NVIDIA to ship H200 chips to China under certain conditions, as part of broader geopolitical and supply chain considerations. There is no direct commentary from Jensen Huang on NVIDIA's AI strategy, supply chain, or competition.
"President Trump said the U.S. will let NVIDIA ship its H200 chips to approved customers in China and elsewhere, on the condition that the U.S. gets a 25% cut."

1443. Doppelganger

Episode: OpenAI $6 Mrd. ESOPs in einem Jahr | KI-Boom killt Bruckenbau | Jensen Huang lobbyt Trump #519
Date: 2025-12-16 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of employee stock options, highlighting that 80% of their employees became millionaires due to the stock's strong performance, in a discussion mainly focused on OpenAI's recent changes to ESOP policies.
"Siehe NVIDIA zum Beispiel, wo 80 Prozent der Mitarbeiter Millionare geworden sind uber Mitarbeiteroptionen, weil sich die Aktie so gut entwickelt hat."

1444. NewsTalk Main Audio Channel

Episode: Yarbrough-Friday - July 25, 2025 - Hour 2
Date: 2025-07-25 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's CEO discussing the importance of adopting AI now to avoid being left behind, positioning NVIDIA as a leader in artificial intelligence. However, the coverage is minimal and lacks detailed insights into strategy, supply chain, or competition.
"Basically, what he's saying is if you're not on board with AI now, you're about to get left in the dust."

1445. Nutanix Community Podcast

Episode: Making Enterprise AI Simple
Date: 2025-12-16 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses general challenges and perspectives around AI adoption, mentioning NVIDIA in the context of an AI Roadshow, but does not provide detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"We talked to a lot of you out there about AI, what's going on, and brought in NVIDIA, brought in IDC as an independent kind of voice on this."

1446. Schwab Network

Episode: Can DELL's Role in A.I. Center Buildout Inspire Earnings Confidence?
Date: 2025-02-27 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast primarily discusses Dell's AI server business and its relationship with NVIDIA, mentioning NVIDIA mostly in passing as a reference point for Dell's AI market position. There is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.
"The knock-on trade, basically. I mean, it seems like Dell's big value-add here is their relationship with NVIDIA. So if, you know, the kingmaker still applies, I guess we'll find out. Right now, the king, though, has struggled to hold on to his own crown."

1447. Closing Bell

Episode: Closing Bell Overtime: Stocks End Lower After Volatile Day Following Nvidia Earnings11/20/25
Date: 2025-11-20 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a significant market reversal involving Nvidia's stock after its earnings report, noting a large swing in market capitalization but without detailed insights into NVIDIA's AI strategy, supply chain, or competition from Jensen Huang or direct company sources.
"The big driver of today's action is, of course, Nvidia giving up that 5% gain after earnings. In overtime and closing down 3%. We're going

to talk more about what happened to cause the reversal coming up."

1448. theCUBE Podcast

Episode: 107. Tom Lee's Crypto Master Class, IPO Window Opening, Trump's AI Action Plan
Date: 2025-07-25 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang from NVIDIA is mentioned briefly in the context of the US AI strategy and the AI competitiveness race, but there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"So, you know, a huge day because the AI competitiveness is huge. Jensen Wong was on there from NVIDIA. The U.S. is very serious about the AI wave, Dave."

1449. Destination Linux

Episode: 437: NVIDIA & Intel's AI Alliance, Steam Malware, and Linux CUDA
Date: 2025-09-29 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode touches on NVIDIA in the context of its involvement with Ubuntu and a mention of its relation to hardware enthusiasts. There is only a brief reference to NVIDIA amid broader discussions on Linux and hardware topics.
"This week's mission, we're diving into Ubuntu and NVIDIA. They're up to something super special."

1450. this is investing

Episode: 718 is this the next wave in AI?
Date: 2025-05-15 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the AI investment landscape, including mentions of NVIDIA and other chip companies in the context of market trends and comparisons to the early internet era. The discussion is general and speculative with no detailed focus on NVIDIA's strategies.
"NVIDIA is off highs. Meta is off highs. Google is off highs. Seems like maybe the boom is already over."

1451. Marketplace Tech

Episode: Bytes: Week in Review - OpenAI's new deal with AMD raises more concerns of AI bubble
Date: 2025-10-10 | Relevance: 35/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA briefly in the context of OpenAI's AI chip partnerships, noting NVIDIA's investment into OpenAI and the circular deal where OpenAI leases NVIDIA chips. The discussion touches on market dynamics but lacks in-depth detail on NVIDIA's AI strategy, supply chain, or competitive positioning.
"It has a similar deal with NVIDIA. NVIDIA agreed to put in $100 billion into OpenAI so that OpenAI can then turn around and lease NVIDIA chips."

1452. Rob Black Show

Episode: Why Nvidia Strong Earnings Matter To You
Date: 2025-05-29 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions Nvidia in the context of its stock reacting to a post-earnings rally, with some broader market and tariff discussions, but does not provide detailed insights on NVIDIA's AI strategy, supply chain, or competition from Jensen Huang.
"Primarily driven by a post-earnings rally in Nvidia shares. More on Nvidia later."

1453. Becker Private Equity & Business Podcast

Episode: Microsoft vs. NVIDIA 6-6-25
Date: 2025-06-06 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode compares Microsoft and NVIDIA in terms of market capitalization and leadership, acknowledging NVIDIA's significant growth and status in the market without delving deeply into its AI strategy, supply chain, or competition.
"Microsoft now is at $3.51 trillion in market cap as of currently. NVIDIA is at $3.47 in market cap currently."

1454. Becker Business Minute Podcast

Episode: Microsoft vs. NVIDIA 6-6-25
Date: 2025-06-06 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly compares the market capitalizations of Microsoft and NVIDIA, noting that NVIDIA is a major player but does not delve into NVIDIA's AI strategy, supply chain, or competition details. The host mistakenly refers to NVIDIA's CEO as 'Justin Wang' instead of Jensen Huang.
"NVIDIA ran by Taiwanese immigrant and brilliant person Justin Wang is number two. $3.47 trillion in market cap."

1455. Becker Business Minute Podcast

Episode: Microsoft vs. NVIDIA 6-6-25
Date: 2025-06-06 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast compares Microsoft and NVIDIA in terms of market capitalization, noting NVIDIA's significant valuation and growth but misidentifies NVIDIA's CEO. The discussion is brief and lacks detailed analysis of NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA ran by Taiwanese immigrant and brilliant person Justin Wang is number two."

1456. TechNation Radio Podcast

Episode: Episode 25-14 Inside Nvidia & Jensen Huang
Date: 2025-04-11 | Relevance: 40/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast includes a segment with journalist Stephen Witt discussing NVIDIA and its CEO Jensen Huang, but the provided transcript excerpt mainly covers topics unrelated to NVIDIA's AI strategy, supply chain, or competition, offering only a light mention of the company.
"journalist Stephen Witt gives us valuable insight into the AI chip company, NVIDIA. And just who exactly is its CEO, Jensen Huang."

1457. Becker Private Equity & Business

Episode: Microsoft vs. NVIDIA 6-6-25
Date: 2025-06-06 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly compares the market capitalizations of Microsoft and NVIDIA and reflects on NVIDIA's position as a leading company led by an immigrant CEO. It does not discuss NVIDIA's AI strategy, supply chain, or competition in detail.
"Microsoft now is at $3.51 trillion in market cap as of currently. NVIDIA is at $3.47 in market cap currently."

1458. Becker Private Equity & Business

Episode: Apple, NVIDIA & Palatnir 3-22-25
Date: 2025-03-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA primarily in the context of market capitalization and its year-to-date stock performance compared to Apple and Palatnir. There is no discussion of Jensen Huang, AI strategy, supply chain, or competition.
"NVIDIA is number two in market cap at about 2.8 trillion, but it's also down year to date. Now about 13% or so, 12.3% or so year to date, but some rebound lately."

1459. No Tiene Nombre

Episode: NTN 422 - Chrome piensa, Nvidia invierte, Notion trabaja
Date: 2025-09-19 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions Nvidia in the context of an investment or partnership with Intel but does not provide detailed insights. The discussion is mostly focused on Google's AI integration in Chrome, with Nvidia mentioned tangentially.
"Saliendo del mundo de los navegadores y el mundo de los buscadores, nos vamos a hablar de lo que yo pense. Esto basicamente lo tenia que pensar lo que ha hecho Nvidia con Intel. Es como si Coca-Cola fuera y le dijera Pepsi. Te voy a dar dinero"

1460. BNR Headlines

Episode: Nvidia breekt door beurswaarde van 4.000 miljard dollar: 'Meer dan Nederlandse en Franse beurs samen'
Date: 2025-07-09 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast discusses Nvidia's market capitalization reaching 4,000 billion dollars, highlighting its size relative to European stock exchanges and historical companies. An analyst shares personal investment enthusiasm, but there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition, nor any statements from Jensen Huang.
"Nvidia is officieel 4.000 miljard dollar waard. Ja, dat is evenveel als de Franse en de Nederlandse beurs samen."

1461. FT News Briefing

Episode: SoftBank divesting from Nvidia could be good, actually
Date: 2025-11-12 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses SoftBank's sale of its nearly $6 billion stake in NVIDIA, noting the share price impact and presenting an analyst's view that the divestment might not be negative for NVIDIA.
"SoftBank decided to sell its nearly $6 billion stake in the chipmaker Nvidia. The Japanese conglomerate announced the sale yesterday, and that sent Nvidia shares down almost 3%. But the divestment might not be all bad for Nvidia."

1462. Bloomberg Daybreak: Asia Edition

Episode: China-Japan Tensions, Jensen Huang, Lisa Su at CES
Date: 2026-01-07 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of South Korean companies participating in global AI developments, including both US and Chinese AI advancements, without detailing NVIDIA's strategy or competition. It mainly discusses geopolitical context affecting technology and AI sectors.

"South Korean companies plug into both. They also have some exposure to China's AI boom and what's going on with DeepSeq. So, we're seeing the cost be dramatically outperformed US equities as the AI-related boom for global stocks extends."

1463. Rapid Money Radio

Episode: Nvidia's $8B Tax Bill; Linde Jumps 25% 01/23/26
Date: 2026-01-23 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses California's proposed 5% billionaire wealth tax and its potential financial impact on NVIDIA's CEO Jensen Huang, along with considerations about how this tax might affect company and individual residency in Silicon Valley. There is no detailed discussion about NVIDIA's AI strategy, supply chain, or competition.

"Despite the monumental sum, Huang recently told Bloomberg that he hasn't given the proposal even one thought, emphasizing that NVIDIA operates in Silicon Valley due to its unparalleled talent pool."

1464. Motley Fool Money

Episode: Market Movers: Jerome Powell and Jensen Huang
Date: 2025-03-21 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA in connection with AI developments and tariff impact but primarily focuses on economic conditions and Fed policy. There is no detailed discussion of Jensen Huang's statements on NVIDIA's AI strategy, supply chain, or competition.

"We've got the latest and greatest in AI from NVIDIA, how a company focused on infrastructure projects is thinking about tariff impact."

1465. La Chronique Bourse

Episode: Jensen Huang is the new Jerome Powell
Date: 2025-10-09 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode discusses Jensen Huang's influence on markets and compares him to central bankers, noting investor enthusiasm around NVIDIA amidst the AI-driven economic super cycle; however, detailed insights into NVIDIA's AI strategy, supply chain, or competition are not provided.

"Les investisseurs eux, ils boivent les paroles du patron de Nvidia Jensen Huang dont l'influence commence a ressembler a celle des grands banquiers centraux, d'ou le titre evidemment."

1466. Bloomberg Tech

Episode: Nvidia's Huang Meets With Trump, Tesla Taxis Move West
Date: 2025-07-11 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang's meeting with President Trump and notes NVIDIA's recent market cap milestone, but provides no detailed discussion of AI strategy, supply chain, or competition.

"NVIDIA CEO Jensen Wong meeting with U.S. President Trump at the White House yesterday. That's ahead of a big trip plan next week to China."

1467. EZ News

Episode: EZ News 2016/02/03
Date: 2026-02-03 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's CEO Jensen Huang confirming his attendance at Computex in Taiwan and plans for new announcements, as well as his visit to thank NVIDIA's partners. There is no detailed discussion on AI strategy, supply chain, or competition.

"NVIDIA's Jensen Huang is confirming that he will return to Taiwan in June to attend Computex. He said before departing Taiwan on Monday that the company would plan to make several new announcements and to deliver a keynote address."

1468. Linea mercati

Episode: The Street | WS, Dow Jones, Bitcoin, Huang, Macro USA
Date: 2026-02-06 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: Jensen Huang comments on the unprecedented infrastructure expansion driven by hyperscalers and the impact of AI on companies like Meta Platforms. The mention is brief and general, without specific details on NVIDIA's AI strategy, supply chain, or competition.
"siamo in una situazione che capita una sola volta in una generazione, perche questa e un'espansione infrastrutturale senza precedenti."

1469. The Explanation

Episode: The Media Show: Trade wars, tariffs, and Trump's media strategy
Date: 2025-04-10 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly introduces Jensen Huang and NVIDIA, including a summary of Huang's background and a mention of NVIDIA's valuation, but does not discuss his AI strategy, supply chain, or competition.
"Jensen Huang is the founder of Nvidia. That's the company that makes the chips to power AI. It's valued at more than $2 trillion."

1470. Tina Huang

Episode: How I Would Start My Career In 2024 (if I could redo over) | Tina Huang
Date: 2025-09-03 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The speaker mentions Jensen Huang's statement about AI evolving to the point where no programming is needed, discussing its implications for choosing computer science as a career, but does not provide detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"It is our job to create computing technology such that nobody has to program."

1471. Innovation Pulse: Daily News - AI, Startups, Cleantech, Auto + Learning Extras

Episode: AI PULSE - Voice mode for Claude and The AI Memory Revolution
Date: 2025-05-29 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA as one of several companies making strategic moves in AI innovation, but does not provide detailed information or direct commentary on NVIDIA's AI strategy, supply chain, or competition.
"OpenAI, Anthropic, Meta and NVIDIA are making strategic moves in AI innovation."

1472. Open AI

Episode: OpenAI + Oracle: The New Cloud Alliance?
Date: 2025-10-02 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses a significant cloud infrastructure expansion by OpenAI with Oracle and SoftBank, briefly mentioning NVIDIA's involvement in funding but without detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"...the impact this has had on Oracle, how NVIDIA is helping to fund this, and a lot more."

1473. Artificial Intelligence: AI News, ChatGPT, OpenAI, LLM, Anthropic, Claude, Google AI

Episode: OpenAI's Infrastructure Revolution
Date: 2025-10-02 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's financial contribution to OpenAI's data center infrastructure projects but does not delve into NVIDIA's AI strategy, supply chain, or competitive position.
"NVIDIA is helping to fund this, and a lot more."

1474. The AI News Daily Brief

Episode: AI in Cancer Research, AMD's Open-Source Strategy, and Lockheed's AI Fight Club
Date: 2025-06-05 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of AMD's efforts to compete in AI hardware by acquiring a startup aimed at making AI software more compatible across different hardware. There's no direct discussion of NVIDIA's AI strategy, supply chain, or competition beyond this context.
"Have you ever felt like NVIDIA is everywhere when it comes to artificial intelligence hardware? Well, AMD is making a bold move to change that narrative."

1475. AI Proving Ground Podcast: Exploring Artificial Intelligence & Enterprise AI with World Wide Technology

Episode: NVIDIA Leaders on Building AI Factories and Driving AI Innovation
Date: 2025-12-05 | Relevance: 30/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: Executives from NVIDIA participate in a broad discussion on AI strategies focusing on AI factories, geopolitical tensions, and industry impacts, but Jensen Huang does not speak and specific details on NVIDIA's AI strategy, supply chain, or competition are not deeply addressed in the provided excerpt.

"decisions about where data lives, who trains the models and how quickly you can move from idea to first train aren't just IT conversations, they're economic strategy and a matter of competitive survival."

1476. BitLab Academy

Episode: Bitcoin Nvidia DOOMSDAY? (MAJOR Strategy WARNING)
Date: 2025-11-21 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA and its founder Jensen Huang in the context of the company's large market capitalization and a recent stock price drop following earnings, expressing concern about the potential market impact if NVIDIA's earnings expectations are missed. There is no discussion of NVIDIA's AI strategy, supply chain, or competition.

"'And I drew this line about two weeks ago, it's pulled back down to this previous range high, but the meat, the meat of the liquidity isn't this line. I mean, that's one candle. The meat of the liquidity is through here, which is a pretty, you know, it's a pretty decent drop.'"

1477. The Amazing AI News

Episode: "Tech-Eco Balance. Nvidia Spotlight. Meta Revolution. "
Date: 2025-07-20 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions Nvidia in the context of its impressive stock gains and role as a key player in the AI chip market, highlighting investor interest and related industry developments like TSMC's results. However, it lacks detailed discussion on Jensen Huang's comments, AI strategy, supply chain, or competition.

"Nvidia's stock is blazing, with an impressive 80% gain that is stirring concerns of overheating."

1478. The Investing for Beginners Podcast - Your Path to Financial Freedom

Episode: Semiconductors Demystified w/ Nick Rossolillo: Supply Chain, Cyclicality, and Top Chip Stocks
Date: 2025-12-11 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor industry broadly, using NVIDIA as an example to explain that the company is not involved in the entire semiconductor supply chain but rather focuses on chip design. It provides general education on semiconductor materials and processes without detailed insights into NVIDIA's strategy or operations.

"Some, everybody, most people are listening to this probably are familiar with NVIDIA and they are not the end, not the beginning and the end of how a semiconductor is made."

1479. Wall Street Breakfast

Episode: The biggest restaurant chain hits the states
Date: 2026-01-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's $2 billion investment in CoreWeave and the expansion of their collaboration to build AI factories using NVIDIA's infrastructure. However, there is no discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"CoreWeave, under ticker CRWV, is rallying after NVIDIA... invested $2 billion in the company and expanded their collaboration to help CoreWeave accelerate the build-out of more than 5 gigawatts of AI factories by 2030."

1480. The Exchange

Episode: Supply Chain Shenanigans, the AI Open Market, Spotify on Deck 4/28/25
Date: 2025-04-28 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's stock declining about 4%, attributing the pressure to a report about Huawei developing its own AI chips, thus increasing competition and dragging down the semiconductor sector.

"NVIDIA, that company, that stock is down roughly 4% right now, still hovering below that 200-day moving average or longer-term trend line."

1481. Theta Fuse

Episode: NVIDIA's Hidden Powerhouse: How SMCI's 'Server Samurai' Became a $40 B AI Goldmine-& What Happens Next
Date: 2025-07-25 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses SMCI's role in building infrastructure that supports AI computing, briefly mentioning NVIDIA's GPUs as critical components in AI systems but focusing mainly on SMCI's contributions.

"When the world thinks AI, the immediate thought often jumps to the groundbreaking chips, right? Like NVIDIA's powerful GPUs. Yeah, the brains of the operation."

1482. News

Episode: News - 2025-08-14
Date: 2025-08-14 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions a U.S. agreement granting NVIDIA an export license for its H20 chips to China under a revenue sharing condition, but does not discuss Jensen Huang or detailed AI strategy, supply chain, or competition matters related to NVIDIA.

"U.S. President Donald Trump confirmed that he had reached an agreement with NVIDIA granting an export license for its H20 chips, designed specifically for the Chinese market, on the condition of a 15% revenue share."

1483. A Hidden and Prolonged Persecution:Reports from Mainland China + NEWS/VIEWS/NOVELS

Episode: Trump Admin Eyes Semiconductor Tariffs-Here's What to Know
Date: 2025-05-13 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor industry landscape, mentioning Nvidia as one of the fabless manufacturers specializing in designing and selling semiconductors without fabrication. It also covers broader topics about manufacturing shifts and export controls affecting chip production.

"Advanced micro-devices, commonly known as AMD, Nvidia, and Qualcomm are what are now known as fabbles manufacturers, companies that research, design, and sell semiconductors but do not fabricate them."

1484. Our Curious Amalgam

Episode: #326 What's Happening in Italy and Greece? Catching Up With International Enforcers at the 2025 Spring Meeting
Date: 2025-05-19 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The mention briefly discusses a regulatory transaction involving NVIDIA regarding the referral of a below-threshold merger to the European Commission, which was later cleared. NVIDIA appealed the decision to accept the referral, with proceedings ongoing that could clarify competition law frameworks in Europe.

"It's a transaction involving NVIDIA, the largest manufacturer of graphical processing units. So a very important component in the AI world."

1485. WSJ Tech News Briefing

Episode: TNB Tech Minute: Tesla to Double Robotaxi Fleet in Austin Next Month
Date: 2025-11-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of a potential deal between Meta and Google that could challenge NVIDIA's position in the AI chip market, noting recent stock movements of NVIDIA and competitors. There is no direct commentary from NVIDIA or Jensen Huang, nor detailed discussion on the company's AI strategy, supply chain, or competition.

"This potential deal could challenge NVIDIA's leading position in the chip market."

1486. WSJ Tech News Briefing

Episode: TNB Tech Minute: Alibaba Creates AI Chip to Help China Fill Nvidia Void
Date: 2025-08-29 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly discusses how Alibaba is developing AI chips to fill the void created by NVIDIA's regulatory barriers in China, indicating competition and supply challenges but provides no direct insights from Jensen Huang or NVIDIA's AI strategy.

"Alibaba was once one of the biggest customers of American AI chip leader Nvidia. Now it and other chip designers are filling the void left after Nvidia ran into regulatory barriers to selling its products in China."

1487. The AI News Daily Brief

Episode: OpenAI's Operator, Nvidia's ASL Tool, and AI Audiobook Controversy
Date: 2025-02-21 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA as a strategic investor in Together AI, a startup providing AI computing resources, highlighting their role in the expanding AI market. However, there is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"The involvement of big names like NVIDIA and Salesforce Ventures further underscores the strategic importance of Together AI's offerings."

1488. The Information's TITV

Episode: Crypto's Hottest Startup, Upgrade CEO on Future IPO, Questions Ahead of Nvidia GTC | Oct 20, 2025
Date: 2025-10-20 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast preview mentions Nvidia's upcoming GTC conference and discusses competitors but does not include detailed discussion or direct comments from Jensen Huang about NVIDIA's AI strategy, supply chain, or competition.
"We have got a great show planned for you today...we'll also preview Nvidia's GTC conference in Washington, D.C. with analyst Patrick Moorhead, and we're going to talk about which company is closest on Nvidia's tail."

1489. Wall Street Breakfast

Episode: AI boosting CEO productivity now
Date: 2025-12-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA preparing to ship H200 GPUs to China by mid-February, with potential shipment volumes of 5,000 to 10,000 modules. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA is reportedly preparing to start shipping its H200 GPUs to China by mid-February. Reuters says shipments could begin before the Lunar New Year and may total 5,000 to 10,000 modules."

1490. Stonks Gone Wrong

Episode: August 26, 2025 - Stonks Gone Wrong Market Update
Date: 2025-08-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of competition with AMD in the GPU market, portraying AMD as an emerging competitor challenging NVIDIA's dominance. There's no detailed discussion on NVIDIA's AI strategy, supply chain, or specific executive commentary from Jensen Huang.
""AMD's got a P-E ratio that doesn't make you want to cry into your portfolio. Yeah, and with NVIDIA treating AMD like a price check, it's like AMD's been the Robin to NVIDIA's Batman.""

1491. Schwab Network

Episode: NVDA Competition Heating Up? AMD & INTC Rope in New Bull
Date: 2026-01-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses smart upgrades for AMD and Intel based on data center demand and supply chain constraints, with a brief mention that Jensen Huang of NVIDIA is not the only player benefiting in the AI chip market. It does not deeply analyze NVIDIA's AI strategy, supply chain, or competition.
"It just feels like Jensen Huang doesn't get to eat all the pie or all the cake, whatever you prefer, to himself. There are plenty of slices for everyone to go around."

1492. Trending News by PocketPod

Episode: Big Tech Pushes Back on AI Safety Rules, Scientists Question AI's Future, and Taiwan's Tech Gamble Raises Stakes
Date: 2025-03-16 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of Chinese AI company DeepSeek's rise and its impact on the AI market, including possible effects on NVIDIA's stock and hardware supply due to export restrictions.
"I mean, NVIDIA's stock experience fluctuations around the time of DeepSeek's rise, but a direct causal link of an 18% drop needs further substantiation."

1493. Lubbock Daily News Now | 2 Min News | The Daily News Now!

Episode: Trump's AI Push: Economic Boost or Consumer Burden?
Date: 2025-11-19 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA co-founder Jensen Huang attending an AI investment forum and briefly notes his cautious view that AI will change jobs. The discussion mainly focuses on AI's economic impact and investment, with little specific detail on NVIDIA's AI strategy, supply chain, or competition.
"While NVIDIA's Jensen Huang was more cautious, he agreed that everyone's jobs would certainly change."

1494. The American Compass Podcast

Episode: Still Hooked on Beijing with Geoffrey Cain
Date: 2025-08-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast discusses NVIDIA's lobbying efforts to sell AI chips in China amidst debates on chip sales and national interests, highlighting conflicts between shareholder interests and American national security concerns.

"NVIDIA in particular, the leading AI chip maker, lobbying very aggressively to be able to sell chips in China for reasons that appear entirely at odds with the American national interest, but perhaps aligned with the interest of NVIDIA shareholders."

1495. News

Episode: Lai's approval rebounds to 57% ahead of first year, KMT plans protest
Date: 2025-05-15 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang as a torchbearer for the 2025 World Masters Opening Ceremony, highlighting his leadership role in technology and AI. Huang alludes to AI's growing role in sports but does not provide specific details on NVIDIA's AI strategy, supply chain, or competition.

"The future of sports is evolving and we're just getting started."

1496. Digital Dragon Watch: Weekly China Cyber Alert

Episode: Silk Typhoon APT Strikes Again Exploiting Zero-Days While US and China Face Off in Chip Wars
Date: 2025-08-24 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly discusses tensions between the US and China over NVIDIA's H20 chips, mentioning Chinese regulatory restrictions and Jensen Huang dismissing security concerns, highlighting China's push for chip self-sufficiency amid trade tensions.

"Nivea CEO Jensen Huang is outright dismissing security concerns."

1497. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: What Should the Government's Role in AI Be?
Date: 2025-11-10 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of a market downturn affecting AI stocks, noting a 9.6% drop in NVIDIA's share price amid broader AI sector losses and economic concerns. There is no specific discussion of Jensen Huang or detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"Palantir was down 13% for the week, Oracle dropped 9.7%, and NVIDIA was down by 9.6%."

1498. The SPY Trader

Episode: Market Chacha: Trade Wars & Rate Cuts
Date: 2025-03-20 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's CEO Jensen Huang's plan to invest several hundred billion into the U.S. supply chain, but does not elaborate on AI strategy or competition.

"NVIDIA's CEO Jensen Huang plans to pump several hundred billion into the U.S. supply chain."

1499. LessWrong posts by zvi

Episode: "AI #125: Smooth Criminal" by Zvi
Date: 2025-07-17 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast briefly mentions the Trump administration allowing Nvidia to resume selling AI chips to China, considering it a significant policy error that could affect geopolitical competition. There is no detailed discussion about Jensen Huang or Nvidia's AI strategy, supply chain, or competition.

""...the announced intention by the Trump administration to allow Nvidia to resume selling H20AI chips to China. There may still be time to stop this, if not it is a very large unforced error...""

1500. Morning Brew Daily

Episode: Davos 101: A Preview of the World Economic Forum 2026
Date: 2026-01-19 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions Jensen Huang and NVIDIA as key participants in the upcoming World Economic Forum, highlighting Jensen as a central figure in AI discussions, but without detailing NVIDIA's AI strategy, supply chain, or competitive positioning.

"Jensen Huang is kind of the Trump version of the AI. He is going to be the center of gravity when it comes to that discussion topic."

1501. Headline News

Episode: Industrial value-added in surveyed Chinese enterprises grew 6.4% in H1
Date: 2025-07-18 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA CEO Jensen Huang meeting with China's Commerce Minister Wang Wentao during the China International Supply Chain Expo, highlighting China's willingness to deepen cooperation with NVIDIA in artificial intelligence and the attractiveness of the Chinese market.

"Wang expressed hope that multinational companies, including NVIDIA, will provide Chinese clients with high-quality and reliable products and services and deepen cooperation in artificial intelligence."

1502. The Rundown

Episode: Palantir Shook by Possible Defense Spending Cuts, Walmart Slides Following Profit Warning
Date: 2025-02-20 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions the upcoming NVIDIA earnings report and the importance of their AI chip demand, but does not discuss Jensen Huang's views or details on NVIDIA's AI strategy, supply chain, or competition.

"I have to mention that NVIDIA earnings are less than a week away. NVIDIA reports earnings on Wednesday, February 26th after the market closed. And I feel like NVIDIA earnings are the most important earnings of the season."

1503. TechCheck

Episode: Google and Anthropic Ink Cloud Computing Deal, Plus Wall Street Cools on Intel 10/24/25
Date: 2025-10-24 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast excerpt briefly mentions NVIDIA in context of a multi-cloud strategy supporting Anthropic's AI services, highlighting NVIDIA as one of the cloud platforms involved in AI infrastructure delivery. There is no direct discussion of NVIDIA's AI strategy, supply chain, or competition from Jensen Huang or detailed analysis.

"...Claude stayed online, which was a real-world stress test, showing the value of Anthropic's multi-cloud strategy across Google, Amazon, and NVIDIA."

1504. Asianometry

Episode: Intel Should Second-Source Nvidia
Date: 2025-08-24 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses how Intel's potential U.S. government-backed revival strategy may involve nudging tech giants like Nvidia to utilize Intel's foundries, but there is no direct discussion of Nvidia's AI strategy, supply chain, or competition. Nvidia is mentioned more as part of Intel's context rather than a focused subject.

""Dude is 100% going to nudge, quote-unquote, Apple and Nvidia to use their 14A foundries.""

1505. The Rundown

Episode: Google Delivers Earnings Beat, Meta Makes Cuts to Reality Labs Division
Date: 2025-04-25 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly references NVIDIA in the context of the AI chip race, noting that Intel is behind NVIDIA and AMD in this area and that NVIDIA's stock has declined over 20% this year so far. There is no detailed discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"Intel is far behind in the AI chip race compared to the likes of NVIDIA and AMD."

1506. PC Perspective Podcast

Episode: Podcast #820 - Intel 200S Boost, 9060 XT at Computex? Oblivion Remastered, Intel 18A, Lots of (in)Security
Date: 2025-04-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of Intel's potential as a foundry partner for NVIDIA and AMD due to advancements in Intel's process technology, without deep discussion about NVIDIA's AI strategy, supply chain, or competition.

"Companies like NVIDIA and I believe AMD are looking at Intel as a potential foundry partner, which, you know, it's a brave new world we live in."

1507. The Everything Feed - All Packet Pushers Pods

Episode: NB544: NVIDIA Buys $5 Billion of Intel Stock; Netskope Rides SASE IPO to an $8.8 Billion Valuation
Date: 2025-09-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode mentions NVIDIA in the context of its investment in Intel and a remote code execution vulnerability found in an NVIDIA AI tool. However, the discussion is brief and lacks detailed insights into NVIDIA's AI strategy, supply chain, or competition.

"Okay, there is a remote code execution in an AI tool from NVIDIA."

1508. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: EP 625: Sora 2 release and update, OpenAI and AMD partner, ChatGPT Visual Agent Builder incoming and more AI News That Matters
Date: 2025-10-06 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode mentions NVIDIA briefly, highlighting a past statement that NVIDIA is a highly important company in the AI space, with a prediction that it would become one of the biggest companies. However, the discussion is not focused on NVIDIA's AI strategy, supply chain, or competition.
"I said back in 2023 NVIDIA, which at the time wasn't a top 20 company in the U S I said, NVIDIA is the most important company in the world."

1509. Best Stocks Now with Bill Gunderson

Episode: Wednesday Nov. 12, 2025
Date: 2025-11-12 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in relation to its significant weight in the S&P 500 and its high forward P/E ratio, suggesting some rotation out of high P/E tech stocks like NVIDIA into lower P/E tech stocks. There is no in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.
"I read that the market, the S&P is tracking NVIDIA more than it's tracking the rest of the stocks in the market because NVIDIA has become 8.8% of the S&P 500."

1510. Network Break

Episode: NB544: NVIDIA Buys $5 Billion of Intel Stock; Netskope Rides SASE IPO to an $8.8 Billion Valuation
Date: 2025-09-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions NVIDIA in relation to an investment in Intel and highlights a remote code execution vulnerability in an NVIDIA AI tool, but does not discuss Jensen Huang or NVIDIA's AI strategy, supply chain, or competition in depth.
"Okay, there is a remote code execution in an AI tool from NVIDIA."

1511. Focus Fondamental

Episode: FFP(039) - DeepSeek : Nvidia en danger ? L'IA en 2025
Date: 2025-02-10 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions NVIDIA in the context of discussing AI, its history, and AI companies, but does not provide an in-depth discussion or specific insights into NVIDIA's AI strategy, supply chain, or competition. The episode seems to be an introductory overview rather than a detailed analysis.
"et on va parler d'NVIDIA c'est vrai qu'on n'en a pas enormement parle sur la chaine... on va faire un petit point enfin un gros point en l'occurrence"

1512. Les podcasts du Club iGen

Episode: AMD, Intel... faut-il enterrer le x86 ?
Date: 2025-02-12 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA in the context of its market position and branding in the graphics card segment amid competition from Intel and AMD, noting NVIDIA as a leading brand but without detailed discussion on AI strategy or supply chain.
""Meme si, voila, on peut avoir une GeForce tres lente. Il y a des modeles d'entree de gamme qui ne sont pas tres interessants, mais dans un PC portable a pas cher, vendre juste le mot GeForce ou Nvidia ecrit dessus ou le logo Verdatre, ca suffit a faire vendre en fait.""

1513. The Six Five with Patrick Moorhead and Daniel Newman

Episode: Ep. 248: We are Live! Talking Qualcomm, Arm, AMD, Amazon, Alphabet, IBM, Coherent
Date: 2025-02-07 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion lightly touches on NVIDIA's renewed focus on the automotive sector and its role as a competitor to Qualcomm, but primarily centers around Qualcomm's business and market strategy. There is no direct mention of Jensen Huang or NVIDIA's AI strategy, supply chain, or detailed competitive positioning.
"Now, I know NVIDIA is going to get back focused on that again now, but that was a really big move."

1514. The Doers Nepal -Podcast

Episode: 15+ years in Intel | The future is computing | Pradeep khanal | Ep 254
Date: 2025-03-14 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast features a discussion about general industry trends including AI shifts and competition mentioning NVIDIA alongside other players like AMD. The speaker talks about customer relations and market competitiveness without in-depth focus on NVIDIA's AI strategy, supply chain, or competition.
"There are competitors. AI shifts. NVIDIA. AMD and product. It's competitive."

1515. All TWiT.tv Shows (Audio)

Episode: Untitled Linux Show 193: Unrolled My Fruit Loops
Date: 2025-03-09 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly discusses recent AMD and NVIDIA GPU releases and their applicability on Linux, but provides no detailed insights into NVIDIA's AI strategy, supply chain, or competitive positioning.
"Hey, this week we're talking about the new AMD and NVIDIA GPU releases and which ones make sense on Linux."

1516. The Gemini Brief - Investment Deep Dives

Episode: Advanced Micro Devices, Inc.: An In-Depth Equity Analysis
Date: 2026-01-06 | Relevance: 20/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses AMD's strategic initiatives and their challenge to NVIDIA's dominance in AI accelerators, highlighting AMD's early market inroads against NVIDIA's near monopoly. The focus is on AMD's performance and competitive positioning rather than Jensen Huang's statements or NVIDIA's AI strategy directly.
"They've courageously emerged as the most credible challenger to NVIDIA's near monopoly in AI accelerators. Specifically with their instinct GPU family and, importantly, backed by an open ecosystem software strategy."

1517. @HPCpodcast with Shahin Khan and Doug Black

Episode: @HPCpodcast-100: Dr. Ian Cutress on the State of AI and Advanced Chips - In Depth
Date: 2025-03-12 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA in the context of AI systems and liquid cooling technology at GTC, but the majority of the discussion focuses on semiconductor industry trends, competitor companies like Intel, and various computing technologies.
"Headed to NVIDIA GTC? Visit Cool IT Systems at booth 1109 to see how they've been advancing liquid cooling with NVIDIA from 2009 to today and beyond."

1518. Worldwide Exchange

Episode: AI stress tests, market volatility, and the Fed's next move 2/2/26
Date: 2026-02-02 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Oracle's AI spending and mentions NVIDIA as one of Oracle's largest customers in its AI build-out. There is brief reference to a discussion between NVIDIA and OpenAI about investment size, but no detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"Over the weekend, we saw a lot of back and forth between NVIDIA and OpenAI about what size is that investment going to be."

1519. Telecoms.com Podcast

Episode: WWT, AI and smart glasses
Date: 2025-09-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the role of WWT as a system integrator working with telcos and AI infrastructure, indirectly mentioning NVIDIA's enrichment through AI factory investments. There is a brief acknowledgment of NVIDIA's involvement but no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.
""And one of the things that is enriching NVIDIA especially so much.""

1520. theCUBE Podcast

Episode: 102. Jensen Huang: Taiwan a Supercomputer Hub | Dell, GoogleIO, MSFT Build | VAST's Bold Pivot
Date: 2025-05-23 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly mentions Jensen Huang's presence at events in Taipei and some NVIDIA relationships, but does not delve deeply into NVIDIA's AI strategy, supply chain, or competition.
"Ironically, Jensen Wong was in Taipei, Taiwan, for his event, of which Jeff Clark was at, Computex. And that was an amazing event."

1521. The Circuit

Episode: EP 123: Marvell ASIC TAM, ASIC Challenges Remain, More Semi 2.0
Date: 2025-06-23 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The discussion touches on the marketplace preferences for vendor silicon solutions, noting NVIDIA as the safe and preferred choice, while highlighting varying strategies of hyperscalers like Google and Amazon regarding internal silicon development. NVIDIA is referenced mostly as a benchmark or common choice rather than with direct commentary on its AI strategy, supply chain, or competitive actions.

"I guess we're at the point where at this moment in time, nobody gets fired for buying NVIDIA."

1522. Tech Brew Ride Home

Episode: Valve Takes On Consoles And VR
Date: 2025-11-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly mentions NVIDIA as an enterprise customer involved with the AI coding startup Cursor, highlighting NVIDIA CEO Jensen Huang's positive remarks about the startup and its AI model. There is no detailed discussion about NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA CEO Jensen Huang has given high praise to the startup in recent public appearances."

1523. CNBC's "Fast Money"

Episode: Alphabet Reports Results... And Pharma Stocks Diverge In Weight Loss Drug Race 2/4/26
Date: 2026-02-04 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Alphabet's AI infrastructure spending and briefly mentions NVIDIA's Vera Rubin GPU platform as part of Google's AI chip offerings, but the focus is primarily on Alphabet and its cloud business rather than NVIDIA itself.

"... Pichai did say they'll be among the first to offer the latest Vera Rubin GPU platform for NVIDIA."

1524. On with Kara Swisher

Episode: AMD CEO Lisa Su on AI Chips, Trump's Tariffs and the Magic of Open Source
Date: 2025-05-01 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode focuses primarily on AMD and its CEO Lisa Su, with NVIDIA mentioned as a major competitor in the chip industry, but does not provide detailed discussion on NVIDIA's AI strategy, supply chain, or competition.

"Instead of just two major competitors, Intel and, of course, the now popular NVIDIA, there are a slew of other newcomers in the space to contend with, including in China."

1525. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: 9 AI Predictions from Jensen Huang
Date: 2025-07-26 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang and his optimistic AI job predictions, emphasizing the challenging and transformative nature of AI developments. However, the primary focus is on Microsoft and other AI industry movements, with limited direct discussion about NVIDIA's AI strategy, supply chain, or competition.

"We're talking about NVIDIA CEO Jensen Huang's predictions for the future, and a lot of it's very optimistic about the jobs that AI creates."

1526. Partnerships Unraveled

Episode: Keith Norbie - Inside NetApp's AI Partner Strategy
Date: 2025-09-25 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NetApp's AI partner strategy and mentions NVIDIA as a leader in AI expertise among partners, but does not provide substantive discussion about NVIDIA's AI strategy, supply chain, or competition. The focus is primarily on partner enablement and AI adoption from NetApp's perspective.

"There's really two spectrums of partners that are very resonant in AI that are experts that would be seen worldwide, both from NVIDIA and other places of AI expertise as leaders in this area."

1527. The Tech Strategy Podcast

Episode: AI Infrastructure Lessons from Our Visit to Huawei (269)
Date: 2025-12-03 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses Huawei's AI infrastructure efforts and their attempts to compete in generative AI computing without access to NVIDIA semiconductors, highlighting China's semiconductor manufacturing challenges compared to US technology levels.

"If you're looking for the question of how is China going to compete in frontier high-level computing for generative AI without having

access to NVIDIA semiconductors, this is pretty much the answer right now."

1528. InvestTalk

Episode: The American Supply Chain Renaissance
Date: 2025-12-05 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses broader themes about the revival of U.S. manufacturing and supply chain resilience, mentioning NVIDIA as one of several companies making investments in U.S. manufacturing. There is no detailed discussion of NVIDIA's AI strategy, supply chain specifics, or competition.
""You've had big announcements from companies like Texas Instruments, Apple, TSMC, NVIDIA, etc.""

1529. Neural Newscast

Episode: Prime Cyber Insights: The EU's 2.0 Overhaul and the High Cost of Supply Chain Breaches
Date: 2026-01-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA in the context of a cybersecurity breach at a supplier affecting multiple companies including NVIDIA, highlighting risks in supply chains. However, there is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.
"RansomHub is threatening to leak confidential project documents from Apple, NVIDIA, and Tesla."

1530. Schwab Network

Episode: ASML Earnings Weigh on A.I. Supply Chain, TSLA Cybercab Shakeup
Date: 2025-04-16 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly references NVIDIA in the context of overall tech group earnings and their impact on the semiconductor and AI markets, without detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"All right. And so ASML and NVIDIA certainly can provide some weight on the tech group overall."

1531. VR Download

Episode: Meta 'Celeste' HUD Glasses Leaks & Apple Vision Air Rumors
Date: 2025-07-04 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA GeForce Now in the context of integrating 3D gaming features into cloud gaming services for XR headsets, but does not discuss Jensen Huang or NVIDIA's AI strategy, supply chain, or competition in depth.
"One thing that I really want to see arrive with this kind of trend of traditional flat screen gaming through XR headsets is 3D. I want to see either NVIDIA GeForce Now or Xbox Cloud Gaming allow developers to easily support 3D here."

1532. Other People's Money with Max Wiethe

Episode: What Investors Are Overlooking in AI & Semis | Val Zlatev
Date: 2025-06-05 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the semiconductor industry broadly, mentioning Nvidia among a few other hard tech companies, emphasizing a general investor underweighting in the sector and difficulties in building knowledge about hard tech. There is no focused discussion on Nvidia's AI strategy, supply chain, or competition.
"If you talk to most people and you ask them about a hard tech name, like they'll know Intel, they'll know Nvidia, ASML."

1533. Schwab Network

Episode: "Overblown" CRWV Earnings Reaction? A.I. Demand Bullish, Competition Bearish
Date: 2025-08-13 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The discussion centers around CoreWeave's position in AI infrastructure and its partnership with NVIDIA but reflects more on CoreWeave's competitive challenges rather than NVIDIA's AI strategy explicitly. Key points include customer concentration risk and competitive pressures against hyperscalers.
"I do see the partnerships with NVIDIA, with OpenAI as a strength for them. They're very symbiotic relationships."

1534. Our Curious Amalgam

Episode: #357 Is Strong Competition in GenAI a Hallucination? Discussing Economic Insights in the Industry
Date: 2025-12-22 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode discusses AI industry dynamics and mentions NVIDIA as an exception among companies not yet profitable in AI, highlighting uncertainty about AI's economic impact and competition.
""Nobody seems to really be making much money on this. I mean, obviously, you know, probably besides NVIDIA, but a lot of the

companies are losing a lot of money.""

1535. The Quantum AI Digest

Episode: The Quantum AI Digest: 4 October 2025 Daily Dispatch
Date: 2025-10-04 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast excerpt briefly mentions a reservation of 100,000 NVIDIA GB300 chips by Microsoft as part of a $33 billion infrastructure deal to meet AI demands, indicating NVIDIA's role in AI hardware supply chains.
"Microsoft, for its part, announced $33 billion in infrastructure deals with providers like Nebius and CoreWeave, including a reservation of 100,000 NVIDIA GB300 chips to meet growing AI demands."

1536. The Rundown

Episode: The SEC Investigates Coinbase, Novo Nordisk's CEO Steps Down
Date: 2025-05-16 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's plans to build an R&D facility in Shanghai and notes legal hurdles but does not provide detailed discussion of the company's AI strategy, supply chain, or competition.
"We also tell you about NVIDIA's plans to build an R&D facility in Shanghai despite some legal hurdles."

1537. The China-Global South Podcast

Episode: Jane Perlez on the New Era of U.S.-China Competition and Rivalrly
Date: 2025-12-22 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly discusses Jensen Huang and NVIDIA's H200 chips in the context of U.S.-China tech competition and China's desire for chip autonomy, but it does not provide in-depth analysis of NVIDIA's AI strategy, supply chain, or competition.
"The H200s that you reference, of course, are the chips that NVIDIA sells that China right now apparently is not enthusiastically embracing."

1538. PC Perspective Podcast

Episode: Podcast #831 - Threadripper 9000 Performance, Intel in Trouble, Fractal Scape Gaming Headset, Gen6 SSD & 3D Monitors!
Date: 2025-08-05 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly touches on Nvidia's influence on ARM's increasing market share due to their Hopper architecture, amidst a broader discussion about industry competition involving AMD, Intel, and ARM. However, there is no deep dive into Nvidia's AI strategy, supply chain, or competition from Jensen Huang's perspective.
"arm is now going up in percentage marketplace. Thanks to Nvidia and their hopper. So there's a lot of competition in these spaces that, you know, AMD is, is taking advantage of arm is taken advantage of."

1539. Finanzfluss Podcast

Episode: Magnificent 7 unter der Lupe: Wer sind die Big Player im Welt-Index? (#633)
Date: 2025-09-04 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's expansion in AI and high-performance computing but does not provide detailed insights into Jensen Huang's statements on NVIDIA's AI strategy, supply chain, or competition. The discussion centers on the Magnificent 7 tech companies broadly, including NVIDIA as one player.
"Durch solche Innovationen baut Invidia eben seinen Einfluss in den Bereichen KI und Hochleistungsrechner immer weiter aus."

1540. Haftalk Gundem Degerlendirmesi

Episode: Haftalk Gundem Degerlendirmesi #770
Date: 2026-01-31 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's Multi Frame Generation visual graphics technology as an innovation recently introduced and highlights Intel's adoption of similar technology in their ARC series graphics cards, while also discussing competitive developments from Intel and AMD.
"Coklu kare olusturma teknolojisi. Multi Frame Generation, MFG. Nvidia ile hayatmza giren gorsel grafik teknolojisi."

1541. Bloomberg Daybreak: Europe Edition

Episode: Daybreak Holiday: Markets, Nvidia, Bitcoin
Date: 2025-05-26 | Relevance: 30/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA in the context of its upcoming quarterly report and market expectations but does not provide detailed commentary on Jensen Huang's views or NVIDIA's AI strategy, supply chain, or competition.

"Nvidia is out with its quarterly report on Wednesday. We get a preview with Mandeep Singh, Global Head of Tech Research at Bloomberg Intelligence."

1542. Bloomberg Tech

Episode: Nvidia's Jensen Huang Heads to China, Archer Aviation's Air Taxi Plans
Date: 2025-04-17 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA and Jensen Huang in the context of his visit to China and pressures on the company, but provides no detailed discussion on NVIDIA's AI strategy, supply chain, or competition. The bulk of the excerpt covers other tech topics unrelated to NVIDIA.
"NVIDIA under pressure as Jensen Huang heads to China."

1543. Tech News Today | 2 Min News | The Daily News Now!

Episode: Tech Titans Cash In on AI Boom
Date: 2026-01-04 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions that NVIDIA's CEO Jensen Huang sold $1 billion in stock during 2025 as the company surged to become the world's first $5 trillion business, within the context of a broader AI-driven tech stock rally. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA's Jensen Huang also sold $1 billion amid his company's surge to become the world's first $5 trillion business."

1544. Tech Life

Episode: The King and AI
Date: 2025-11-11 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions Jensen Huang, CEO of Nvidia, attending an event at St James's Palace involving AI pioneers and the Queen Elizabeth Prize for Engineering. There is no in-depth discussion of Nvidia's AI strategy, supply chain, or competition.
"the boss of the multi-trillion dollar AI chip company, Nvidia."

1545. Engadget News + Next

Episode: More people watched a fake NVIDIA livestream than the real thing
Date: 2025-10-30 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses an incident where a fake NVIDIA livestream featuring an AI-generated version of CEO Jensen Wong attracted more live viewers than the actual NVIDIA event. The fake stream promoted a crypto scam unrelated to NVIDIA's real AI strategy, supply chain, or competition.
"The actual keynote speech of NVIDIA's GPU technology conference garnered around 20,000 live views, while the fake stream maxed out at 100,000 live views."

1546. Josh & Gabby Deep Dives

Episode: Episode 503 - Top 4 AI Investments to get rich in 2025
Date: 2025-08-16 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses NVIDIA as one of the top holdings in a unique S&P 500 momentum ETF, highlighting its presence among high momentum stocks but does not delve into NVIDIA's AI strategy, supply chain, or competition.
"SPMO's top five right now include NVIDIA, META, Amazon Broadcom, and even JP Morgan Chase."

1547. The SPY Trader

Episode: The Week Ahead: Rates, Inflation, & Strategy
Date: 2025-09-07 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA briefly in the context of the upcoming Goldman Sachs Communicopia Technology Conference, noting the company's scheduled presentation alongside AMD and others, but provides no detailed discussion of NVIDIA's AI strategy, supply chain, or competitive positioning.
"Keep an eye out for Nvidia, NVDA, and AMD, AMD, as they're set to present at the Goldman Sachs Communicopia Technology Conference on Monday, September 8th."

1548. Stockdays

Episode: AMD DEEP DIVE: Struggling Stock Despite Riding the AI BOOM
Date: 2025-02-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the competitive landscape in tech, mentioning NVIDIA as a key player influencing investor sentiment and competition, but provides no detailed insights into NVIDIA's AI strategy, supply chain, or competition. The discussion centers on broader market dynamics and sector rotation affecting tech stocks like AMD and NVIDIA.
"So like NVIDIA, Intel. Exactly. NVIDIA, Intel, those big players."

1549. Trending News by PocketPod

Episode: Tech Giants Challenge EU's AI Rules, China Pushes AI in Space, and a Blood Test That Reads Your Health History
Date: 2025-02-22 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions investors watching NVIDIA's upcoming earnings with caution but does not discuss Jensen Huang or provide detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"Investors watch NVIDIA's upcoming earnings with caution."

1550. AI in Marketing

Episode: Europe's AI Strategies, OpenAI-Amazon Deal, AI Dating Apps, Facebook Updates, Waymo Expansion
Date: 2025-11-04 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA primarily in the context of being a hardware provider for Amazon's custom cloud setup used in OpenAI's AI model training. However, there is no detailed discussion or direct commentary from NVIDIA executives about the company's AI strategy, supply chain, or competition.
"Amazon's custom setup for OpenAI includes specialized NVIDIA chips enabling expansive AI capabilities."

1551. Power Lunch

Episode: Nvidia holds GTC 10/28/25
Date: 2025-10-28 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's CEO Jensen Huang and the company's upcoming GTC event, but provides minimal substantive discussion about NVIDIA's AI strategy, supply chain, or competition.
"Oh, and if that wasn't enough, those two guys, NVIDIA CEO Jensen Wong, Alex Carp of Palantir, they're coming up as well. That is a big hour, folks."

1552. The TMPDIR podcast

Episode: Matt Madison, the Latest With NVIDIA Embedded and Other Technologies
Date: 2025-07-25 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode features Matt Madison discussing his background in software and embedded Linux, mentioning his work related to NVIDIA Embedded Modules. There is no discussion of Jensen Huang, AI strategy, supply chain, or competition within the provided transcript.
"I've been doing software for a long, long time. I started out working on time sharing systems, you know, those room-sized computers that people laugh at these days."

1553. Breakfast with Ryan Huang, Emaad Akhtar and Audrey Siek

Episode: Breakfast Special: CES 2026 - Reading the Roadmap for Tech and AI
Date: 2026-01-08 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA CEO Jensen Huang as a speaker at CES 2026 alongside other tech leaders, noting the event's vibrant atmosphere and focus on technology and AI. However, there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition provided in the excerpt.
"The CES is arguably one of the most powerful tech events in the world featuring speakers like Jensen Huang, CEO of AI Chip Darling NVIDIA."

1554. AI in Flow

Episode: OpenAI's Amazon Shift, Google's New Assistant, and AI's Impact on Your Phone Bill
Date: 2025-12-17 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of OpenAI's shifting hardware suppliers and emerging competition in AI chips, noting NVIDIA's central role so far and the new competition from Amazon's Trinium and Google's TPUs. The discussion focuses on the broader AI chip market dynamics rather than directly on NVIDIA's strategy, supply chain, or competitive stance.
"They're basically diversifying beyond NVIDIA and Azure, which has been their bread and butter so far."

1555. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: Cursor Raises $2.3B 5 Months After Last Round
Date: 2025-11-15 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA as a strategic investor in Cursor's recent $2.3B funding round, highlighting NVIDIA's strategy of investing in leading AI use cases to drive demand for its compute resources. There is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA is basically handing out money to the top AI use cases, as they know the money is going to come straight back to them as more compute will be needed."

1556. Squawk Pod

Episode: Big Tech's Big Challenges & Transportation Sec. Sean Duffy 11/3/25
Date: 2025-11-03 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions a statement by former President Trump regarding NVIDIA's Blackwell AI chips and their potential sales restrictions to China, but does not include detailed discussion or input from NVIDIA executives like Jensen Huang.

"President Trump says NVIDIA's most advanced semiconductors will be reserved for U.S. customers."

1557. Pivot

Episode: AMD CEO Lisa Su on the "Dead Sexy" AI Chips Race - On with Kara Swisher
Date: 2025-05-10 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode features AMD CEO Lisa Su discussing the competitive landscape in the semiconductor industry, mentioning NVIDIA as a major competitor amid challenges like export controls and geopolitical tensions. However, there is little direct discussion of NVIDIA's AI strategy, supply chain, or specific competitive aspects.

""Instead of just two major competitors, Intel and, of course, the now popular NVIDIA, there are a slew of other newcomers in the space to contend with, including in China.""

1558. The Hardware Unboxed Podcast

Episode: The Nvidia Propaganda Machine
Date: 2025-03-28 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]
Summary: The podcast episode discusses Nvidia's marketing and propaganda efforts, criticizing them as unimpressive and containing some bizarre claims made by an Nvidia employee. There is no detailed discussion of Jensen Huang or Nvidia's AI strategy, supply chain, or competition.

"In this week's podcast, we're going to be talking a lot about Nvidia's marketing... It's really been unimpressive."

1559. Charles Payne's Unstoppable Prosperity Podcast

Episode: Charles' Take: The Rise Of Nvidia
Date: 2025-05-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's historical transformation and Jensen Huang's role in introducing GPUs in computing, relating NVIDIA's rise to the evolution of artificial intelligence, including a discussion about Alan Turing's work. However, it does not provide detailed insights into NVIDIA's current AI strategy, supply chain, or competition.

"The Rise Of Nvidia has become the stuff of legends. It's had many incarnations, which caused Wall Street to have to always kind of like rebrand a company. It was a graphics play, a gaming play. Remember when it was a crypto mining play?"

1560. The Real Investment Show (Full Show)

Episode: 2-27-25 Nvidia Beats - What Now
Date: 2025-02-27 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly discusses NVIDIA's recent earnings beat, noting slowing growth due to the company's size and its impact on markets. However, it lacks detail on NVIDIA's AI strategy, supply chain, or competition, and mostly focuses on broad market implications.

"After the NVIDIA report last night, we'll get into some of those numbers here this morning. Came in, they did beat earnings on top and bottom line. But, you know, the growth rate is slowing down because of the size of the company."

1561. The Joseph Carlson Show

Episode: Nvidia Reports Earnings This Week
Date: 2025-02-25 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode mentions the upcoming NVIDIA earnings report and indicates an intention to analyze the company's current status, risks, and expected earnings outcome. However, no detailed discussion on NVIDIA's AI strategy, supply chain, or competition is present in the excerpt.

"The most anticipated earnings of the week is NVIDIA. Wednesday after market close, we'll be reviewing the case for NVIDIA."

1562. Closing Bell

Episode: Closing Bell Overtime: Nvidia Reports Earnings 8/27/25
Date: 2025-08-27 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode is focused on Nvidia's earnings report, featuring market commentary at the time of the report. There are no detailed discussions or quotes from Jensen Huang regarding Nvidia's AI strategy, supply chain, or competition within the provided transcript excerpt.

1563. Coder Caffeine

Episode: #425 Jensen Huang Maker Mantra: "Ask Relentlessly, Turn Curiosity Into The Future!"
Date: 2025-09-14 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode features Jensen Huang discussing his philosophy of curiosity and relentless questioning as drivers of progress in computing and AI, highlighting his visionary leadership at NVIDIA.
"I honor curiosity as my compass. I stay hungry by always asking questions. I spark progress by seeking answers endlessly."

1564. Becker Private Equity & Business Podcast

Episode: 4 Shout-Outs: Jensen Huang, Tim Cook, Haley Jones, & Geoffrey Cockrell 6-3-25
Date: 2025-06-03 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly mentions Jensen Huang and Tim Cook in the context of managing complicated political and trade situations involving China. It acknowledges Huang's leadership and immigrant drive but does not delve into NVIDIA's AI strategy, supply chain, or competition.
"I do give credit to Jensen Huang and Tim Cook ... as good a leader as they come with that beautiful drive of an immigrant."

1565. Keen On America

Episode: Episode 2490: Stephen Witt explains the rise of NVIDIA and its relentless CEO Jensen Huang
Date: 2025-04-07 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast features an interview with Stephen Witt about his new book on Jensen Huang and NVIDIA, discussing the significance of AI and NVIDIA's role in this technological paradigm shift. However, the discussion remains general and literary-focused, with limited direct insights on NVIDIA's AI strategy, supply chain, or competition.
"This is real. AI is real. And it's going to transform almost every aspect of society in the years to come."

1566. San Francisco Daily Cast

Episode: Tragic Incidents, Labor Strikes, and Celebrity Golf: A Week in Bay Area Headlines
Date: 2025-07-13 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast briefly mentions Jensen Huang's success and NVIDIA's market value surge surpassing Apple due to AI chips, without delving into specifics about NVIDIA's AI strategy, supply chain, or competition.
"Jensen Huang, a rags-to-riches tech CEO, saw success as the company he co-founded, NVIDIA, hit $4 trillion in value, surpassing Apple by $900 billion due to its AI chips."

1567. Rob Black Show

Episode: The Strategy Show For The Week
Date: 2025-08-08 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mention references NVIDIA as part of a group of large tech companies increasing AI-related capital expenditures but does not discuss NVIDIA's AI strategy, supply chain, or competition in detail.
"AI-related spending by the Mag7, which is Apple, Microsoft, Alphabet, Amazon, Meta, Tesla, NVIDIA was up 40% in 2024."

1568. Stop Doing What You Hate

Episode: Humans vs. AI
Date: 2025-09-04 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mention references NVIDIA in the context of stock market behavior during volatile times but does not provide insights into Jensen Huang's views, AI strategy, supply chain, or competition. The discussion centers more on market psychology and investment strategies during periods of fear and greed.
"They were selling their Mag7 stocks. They were running and hiding because they didn't know NVIDIA was getting beat up."

1569. Risk Hackers - Seeking EHS Breakthrough

Episode: Risk Driven AI Strategy
Date: 2025-08-02 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA DeepStream as part of an AI-driven safety monitoring system used by General Electric in manufacturing plants, highlighting the application of NVIDIA's real-time video analytics technology in workplace safety.
"They used computer vision, powered by NVIDIA DeepStream, which is a leading platform for real-time video analytics."

1570. Up First AI

Episode: AI Hardware Evolution: OpenAI Invests in AMD
Date: 2025-10-08 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode mainly discusses a significant supply deal between OpenAI and AMD, highlighting AMD's stock movement and strategy. NVIDIA is mentioned only as a point of comparison to show how the AMD deal differs from previous arrangements OpenAI has had with NVIDIA, but without detailed commentary on NVIDIA's AI strategy, supply chain, or competition.
"This AMD deal is different than what they've done with NVIDIA."

1571. The SPY Trader

Episode: AI vs. The Shutdown: Hedging Growth
Date: 2025-10-10 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast mentions NVIDIA's stock performance and recent developments including a price target increase and a potential chip export deal with Saudi Arabia, reflecting optimism around AI. However, it only briefly touches on these points without deep analysis of NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA NVDA hit a new all-time high after an analyst raised its price target to $300 and on news of a potential chip export deal with Saudi Arabia."

1572. Future Money with Armando Pantoja

Episode: Strategy Sunday: 2026 Prep: Buffett, XRP, TPUs vs GPUs & Bitcoin Outlook
Date: 2025-12-01 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of Google's new TPUs and the company's competitive position, stating that TPUs cannot replace NVIDIA. The discussion is passing and does not provide detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"A lot of people believe that they can replace NVIDIA. That's not true and we'll explain why."

1573. NVIDIA AI Podcast

Episode: How Agentic AI Shortens Drug Development and Boosts Patient Outcomes - Ep. 277
Date: 2025-10-15 | Relevance: 20/100 | Source: SourceSignal.unknown | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: This episode of the NVIDIA AI Podcast discusses the application of Agentic AI in healthcare and pharmaceutical development, featuring guests from IQVIA. There is no direct commentary from Jensen Huang on NVIDIA's AI strategy, supply chain, or competition.

1574. What It Means: A Forrester Podcast

Episode: How The Latest Semiconductor Trends Could Impact Your Tech Strategy
Date: 2025-02-20 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses semiconductor industry trends with a focus on Intel's challenges and strategic moves relative to competitors like NVIDIA. NVIDIA is mentioned only as a benchmark for Intel's high-end chip capabilities but without direct commentary on NVIDIA's own AI strategy, supply chain, or competition.
"they were clearly behind NVIDIA at the high end of the chips. But their broader strategy of wanting to support AI everywhere from the PC to the edge to the data center with small LLMs and large LLMs."

1575. Members Podcast

Episode: Members Podcast - Thursday 20 November
Date: 2025-11-20 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's strong quarterly results and the positive impact on share price and US tech indices, but focuses mainly on general market commentary and Australian bank sector analysis rather than NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA results are finally out, came out this morning at 8.20am and as I speak the share price up 5.1% after hours."

1576. Market Updates

Episode: Pre-Market Report - Friday 28 February: AI rally fizzles, Nvidia sinks | ASX set to drop
Date: 2025-02-27 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
Listen to Episode
Summary: The podcast briefly mentions a significant late-day drop in NVIDIA's stock price, highlighting its 8.5% decrease alongside other chip stocks, in the context of a broader market downturn. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition, just a surface-level market impact note.

"The problem overnight is NVIDIA, which managed to hold up after hours with late results yesterday, so we were hands off the panic button on big tech, but overnight it's all cascaded... you've got NVIDIA down 8.5% and accelerating into the close."

1577. Supply Chain Now

Episode: The Buzz: Procurement Innovation, Logistics Power Plays, and Leading Through Change
Date: 2026-01-23 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in relation to AI-driven logistics solutions provided by EPG, powered by NVIDIA AI infrastructure, but does not discuss Jensen Huang or NVIDIA's AI strategy, supply chain, or competition in depth.

"The innovative supply chain technology leader is announcing new AI-driven logistics solutions, which are powered by a very familiar name, NVIDIA AI Infrastructure."

1578. Supply Chain Management Review Podcast Network

Episode: Talking Supply Chain: Explaining Agentic AI
Date: 2025-02-20 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses agentic AI concepts and references NVIDIA GPUs as part of the foundational compute layer in AI, but does not focus deeply on NVIDIA's AI strategy, supply chain, or competition.

"On the bottom layer, you have compute or you have data. So that's what you hear about, like the NVIDIA, like GPUs."

1579. The Heidrick & Struggles Leadership Podcast

Episode: Managing the semiconductor trilemma: A conversation with Dr. Roawen Chen, chief supply chain and operations officer at Qualcomm
Date: 2025-08-12 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses the semiconductor industry business models and mentions NVIDIA as part of the vibrant fabless segment, but does not provide specific insights about NVIDIA's AI strategy, supply chain, or competition.

"Today you probably look at the tech industry, fabulous industry, including Nvidia, including Broadcom, including Marville, including Qualcomm, even Apple. It's probably represent the most vibrant semiconductor segment."

1580. Tennessee on Supply Chain Management

Episode: S3E12: Shaping Performance, Culture, and Supply Chain Planning with Former P&G Executive Andrew Byer
Date: 2025-09-18 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt briefly references Jensen Huang's view on AI and its impact on jobs, using NVIDIA's CEO as an example to emphasize that AI is a tool for augmentation rather than replacement. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"I'm a big subscriber. And I'll paraphrase Jensen Huang, the NVIDIA CEO. But AI is not likely to take people's jobs. It's the people who use AI well who are going to take the jobs, right?"

1581. MetaPod

Episode: The Future Is Now: AI and 3D Printing for a Stronger Manufacturing Industry
Date: 2026-02-02 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses general concepts around manufacturing, digital transformation, and the role of GPUs like those from NVIDIA but does not provide specific insights into NVIDIA's AI strategy, supply chain, or competition.

"You don't, you know, if you have the capital, the same GPU, however expensive it is that you buy from NVIDIA, OpenAI buys the same GPU and Cloud buys the same GPU. It's the human element that makes the difference."

1582. Venture Everywhere

Episode: On the Supply Chain Switchboard: Hugh Dixson with Bobby Katoli
Date: 2025-10-07 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt discusses the complexity and future evolution of supply chains, with a brief mention of NVIDIA chips in the context of data centers running software like ChatGPT. There is no direct commentary from NVIDIA or Jensen Huang about the company's AI strategy, supply chain specifics, or competition.

"Just look at ChatGPT. At the end of the day, that's run on hardware and that data center has to procure NVIDIA chips."

1583. CNBC's "Fast Money"

Episode: Strong Bank Earnings Fuel Markets... And Impact Of China's Rare Earth Crackdown 10/15/25
Date: 2025-10-15 | Relevance: 20/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses AMD's position and recent deals in the AI chip market relative to NVIDIA, with analysts noting that AMD is closing ground but still dwarfed by NVIDIA's scale in AI chips. There is little direct discussion about NVIDIA's own AI strategy, supply chain, or competition beyond comparison.
""Six gigawatts, though, it's dwarfed by what NVIDIA is doing.""

1584. Proactive - Interviews for investors

Episode: First Phosphate fuels U.S. industrial revival with domestic LFP battery supply chain
Date: 2025-04-15 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode briefly mentions NVIDIA's plan to invest $500 billion in an automated factory in Arizona, linking it to the need for lithium-iron phosphate (LFP) batteries for automation and AI data centers. However, the discussion primarily focuses on the supply chain of phosphate for LFP batteries and domestic manufacturing rather than NVIDIA's AI strategy, supply chain details, or competitive positioning.
""If you look at today, you know, there was also an announcement by NVIDIA. They're going to be, uh, moving one of their factories, uh, back to Arizona, $500 billion investment. That factory is going to be completely automated and all of that's going to have to run on, you know, very high, high powered batteries.""

1585. Tech Brew Ride Home

Episode: Thu. 03/20 - Is Apple In Its "Vista" Era?
Date: 2025-03-20 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA briefly in relation to not being approached to help Intel, but the main discussion focuses on SoftBank's acquisition of Ampere Computing in the AI chip market.
"NVIDIA says it hasn't been approached to help save Intel."

1586. #AxisOfEasy Weekly Tech Digest

Episode: #AxisOfEasy 428: Samsung Faces Renewed Scrutiny Over Hidden Spyware Claims On Its Budget Phones
Date: 2025-11-28 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA graphics cards like the 3080 and 5070 models in the context of discussing Windows 11 performance issues, noting their speed and use in gaming setups, but does not analyze NVIDIA's AI strategy, supply chain, or competition.
"The one we just bought is a 5070. It's the size of like a winter tire for my car. And that one has a UFO designation on benchmark. It's like out of this world fast."

1587. TechCheck

Episode: Trump, Cook clash over iPhones 5/15/25
Date: 2025-05-15 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mention refers to NVIDIA's CEO Jensen Huang attending a Saudi investment conference, implying his favorable standing with then-President Trump compared to other tech CEOs, but offers no detailed insights into NVIDIA's AI strategy, supply chain, or competition.
"I do wonder if they're regretting that Tim Cook did not accompany him to this big Saudi investment conference... NVIDIA CEO was there... It seems like Jensen Wong is his new favorite tech CEO, though."

1588. Coder Radio

Episode: 611: System76's Carl Richell
Date: 2025-03-17 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast excerpt mentions NVIDIA GPUs as part of Thaleo Astra's support for machine learning on ARM architecture, focusing on hardware deployment and cost efficiencies. However, the discussion primarily centers on ARM-based systems and cloud deployment rather than detailed NVIDIA AI strategy, supply chain, or competition insights.
"Of course, Astra supports NVIDIA GPUs, you know, all the way up to the, you know, four, it's like a 6,000 eight as. And so you can do, you know, machine learning on, on arm and then, and then deploy to arm with, uh, and what you're really looking for there is just lowering the costs of, uh, of your deployment and, um, uh, and queries against your LLMs and, and things."

1589. Coder Radio

Episode: 611: System76's Carl Richell
Date: 2025-03-17 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast discusses the use of ARM architecture and mentions that NVIDIA GPUs are supported in the Astra platform up to certain models, with a focus on machine learning deployments and cost efficiencies on ARM devices, but does not provide detailed insights on NVIDIA's AI strategy, supply chain, or competition.

"Of course, Astra supports NVIDIA GPUs, you know, all the way up to the, you know, four, it's like a 6,000 eight as. And so you can do, uh, you know, machine learning on, uh, on arm and then, and then deploy to arm with, uh, and what you're really looking for there is just lowering the costs of, uh, of your deployment and, um, uh, and queries against your LLMs and, and things."

1590. FactSet Evening Market Recap

Episode: Evening Market Recap - Tuesday, 25-Nov
Date: 2025-11-25 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.negative
[Listen to Episode]()
Summary: The podcast briefly mentions NVIDIA's stock decline amid competition concerns from Alphabet's AI chip offerings, particularly in relation to Google Cloud customers including Meta. The discussion is high-level with no direct commentary from insiders or detailed analysis of NVIDIA's AI strategy, supply chain, or competitive positioning.

"NVIDIA was a notable decliner amid Alphabet competition concerns."

1591. Rob Black Show

Episode: Potential China Trade Truce Helps Markets Hit Records
Date: 2025-10-27 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast mention briefly references Qualcomm unveiling new AI accelerator cards to compete with AMD and NVIDIA, but does not discuss NVIDIA directly or in detail regarding AI strategy, supply chain, or competition.

"Qualcomm has moved sharply higher after the company unveiled new chip-based AI accelerator cards to compete with AMD and NVIDIA in 2026 and 2027."

1592. Schwab Network

Episode: "Bifurcated" Mag 7: AAPL & TSLA Catch Up, MSFT's Azure Juggernaut, NVDA Rising Competition
Date: 2025-08-14 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: NVIDIA is mentioned in context with Meta as a reference point in the AI race, comparing how companies like Apple and Meta are approaching AI strategies. However, there is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"We'll use Meta. We'll use NVIDIA as sort of our reference points."

1593. The AI Investor Podcast

Episode: Eric Speaks With Simon Erickson
Date: 2025-08-28 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast briefly references NVIDIA in context of discussing past technology trends like deep learning and self-driving cars, with a passing mention of how NVIDIA was involved in these areas. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"We talked with NVIDIA when they were first talking about this new technology called deep learning."

1594. Tech News Daily

Episode: Global ChatGPT Outage Shakes AI Industry, IBM Reveals Quantum Starling Computer, OpenAI and Google Cloud Unite, Android 16 Launches on Pixel, and more...
Date: 2025-06-11 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast briefly mentions Cisco's collaboration with NVIDIA on AI infrastructure solutions, highlighting Cisco's AI infrastructure order target surpassing $1 billion and the focus on validated infrastructure using open models. However, there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"Cisco is enhancing its collaboration with NVIDIA, focusing on validated infrastructure solutions that utilize open models."

1595. Keyword News

Episode: Keyword News 10/31/2025
Date: 2025-10-31 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]()
Summary: The podcast mentions NVIDIA CEO Jensen Huang attending the Apex Summit alongside global leaders where topics of AI and supply chain resilience are discussed among other economic issues. It provides context on the summit but does not elaborate on NVIDIA's

AI strategy, supply chain, or competition.

"Now, global business leaders such as NVIDIA CEO Jensen Huang are also in attendance."

1596. Sip&Talk| Sunny & Joe

Episode: [Breaking News]US Trade Court Rules Trump Must Drop Most Tariffs?!EP229Sip&Talk|Sunny & Joe
Date: 2025-05-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of U.S. trade policies and tariffs, particularly relating to the court ruling affecting international trade. There is no in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.

"including companies like NVIDIA."

1597. Plain English with Derek Thompson

Episode: A Toy Manufacturer Explains How Trump's Tariffs Could Crush His Industry
Date: 2025-04-17 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang's interactions with the White House regarding chip export controls in the context of U.S. trade policy and tariffs, highlighting concerns about big companies' influence. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

""...like, for example, the NVIDIA CEO Jensen Huang having dinner with the president and getting the White House to exempt some of his chips from export controls, it definitely smells bad.""

1598. Closing Bell

Episode: Closing Bell Overtime: Nvidia Earnings From Every Angle, Plus Results From Salesforce, Snowflake 2/26/25
Date: 2025-02-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly mentions NVIDIA's upcoming quarterly earnings alongside other tech companies, but does not include specific discussion about Jensen Huang or NVIDIA's AI strategy, supply chain, or competition within the excerpt provided.

"It's the moment that could set the tone for the market. Four times a year we get a look inside the health of one of the most important companies at the forefront of the AI revolution, NVIDIA."

1599. Closing Bell

Episode: Closing Bell Overtime: Nvidia Earnings: AI Momentum Rolls On 5/28/25
Date: 2025-05-28 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt briefly mentions waiting for Nvidia's earnings report and notes the stock's recent price movement but does not provide substantive discussion of NVIDIA's AI strategy, supply chain, or competition.

"Stocks losing early morning gains, closing near session lows as investors await Nvidia's earnings later this hour."

1600. Closing Bell

Episode: Closing Bell: What Could February Hold For Your Money? 2/2/26
Date: 2026-02-02 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA briefly as part of the larger tech sector and AI trade discussion, noting the stock being in the red on the day. There is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"Tech having a pretty good day, even with Nvidia, Microsoft and Meta in the red."

1601. Audio:Communism's European Beginnings + NEWS/VIEWS/NOVELS

Episode: China in Focus:Trump- We're Well-Equipped to Handle Potential War With China - EpochTV
Date: 2025-03-22 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA's plan to invest heavily in US-based microchip manufacturing as part of broader discussions on US supply chain and competition with China. However, there is no detailed discussion on NVIDIA's AI strategy, supply chain specifics, or competitive positioning.

"NVIDIA announcing a plan to invest hundreds of billions in US-based microchip making over the next four years."

1602. Audio: Covid Origin Quest + NEWS/VIEWS/NOVELS

Episode: China in Focus:Trump- We're Well-Equipped to Handle Potential War With China - EpochTV
Date: 2025-03-22 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's plan to invest heavily in US-based microchip manufacturing as part of the broader context of US efforts to reduce reliance on China and strengthen domestic production. However, there is no direct discussion of Jensen Huang or NVIDIA's specific AI strategy, supply chain, or competition.

"NVIDIA announcing a plan to invest hundreds of billions in US-based microchip making over the next four years."

1603. The Unbundlers - HOTPOD.AI

Episode: Hot takes - Bill Gurley on BG2 podcast 5/22/2025
Date: 2025-05-24 | Relevance: 15/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast excerpt discusses global AI ecosystem politics, including a mention of Jensen Huang's real-time deal-making which is seen as a positive energy shift, but offers no detailed analysis of NVIDIA's AI strategy, supply chain, or competition.
"When Gerstner talks about seeing CEOs like Jensen Huang doing deals in real time, you can feel the energy shift. From deceleration to acceleration. From how do we stop this to how do we win this?"

1604. Squawk Box Europe Express

Episode: U.S.-China trade talks resume amid signs of progress over chip exports
Date: 2025-06-10 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's Jensen Huang praising the UK as an investment destination during London Tech Week, with no substantive discussion on NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA's Jensen Huang sings the praises of the UK as an investment destination as London Tech Week enters its second day."

1605. WSJ What's News

Episode: Federal Court Blocks Trump's Sweeping Tariffs
Date: 2025-05-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions that NVIDIA's business is booming alongside comments from its CEO critiquing U.S. efforts to restrict China in the global chip market. However, the discussion is limited and mainly focused on the broader context of U.S. trade and tariffs, not detailed NVIDIA strategy.
"NVIDIA's business booms, even as its CEO critiques U.S. efforts to shut China out of the global chips market."

1606. Wall Street mit Markus Koch - featured by Handelsblatt

Episode: AMD explodiert um 35% | Deal mit Open AI
Date: 2025-10-06 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast primarily discusses AMD's new collaboration with OpenAI and briefly mentions that similar transactions involving OpenAI and Nvidia have occurred, positioning Nvidia within the broader context of AI chip partnerships but without detailed discussion on Nvidia or Jensen Huang's statements.
"Es bleibt ein Kreislauf, den wir in ahnlicher Form auch bei der Kooperation zwischen Nvidia und Open AI gesehen haben."

1607. The Artificial Intelligence Podcast

Episode: Today in AI - March 20, 2025
Date: 2025-03-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast excerpt primarily focuses on AMD's leadership and strategy under Lisa Su, with comparative mentions of NVIDIA's market position and dominance in the AI GPU sector.
"Despite these achievements, AMD still views itself as an underdog in the AI sector, trailing behind NVIDIA, which dominates the GPU market with a valuation nearing $3 trillion."

1608. Breaking Analysis with Dave Vellante

Episode: Breaking Analysis | Inside Intel's Bid to Rewire its Destiny
Date: 2025-06-28 | Relevance: 20/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses Intel's strategy and mentions NVIDIA only briefly in the context of Intel looking to draft off of NVIDIA's AI successes while addressing gaps in NVIDIA's product capabilities. There is no direct discussion of NVIDIA's own strategy by Jensen Huang.
"...innovate on the product portfolio side in AI PCs, Edge, and robotics by drafting off of specifically NVIDIA's AI successes, but filling what we see as holes in NVIDIA's product capabilities."

1609. The Windows Central Podcast

Episode: Windows delays NVIDIA's Arm chip? + Surface Laptop 5G!
Date: 2025-07-26 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA's Arm chip in the context of Windows-related news and broader industry topics, but it does not include any detailed discussion of NVIDIA's AI strategy, supply chain, or competition. The conversation mainly focuses on

Microsoft's AI efforts and general tech news.

"There's some NVIDIA news, NVIDIA Arm chip news and then we'll probably round off the show by talking about some hardware"

1610. Broken Silicon

Episode: 318. Zen 6 Specs Verified, AMD R5 330 Krackan 2 Leak, XBOX's Death, RTX 5060 8GB DOA

Date: 2025-07-15 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast excerpt discusses Intel's challenges in the semiconductor industry, with a notable statement acknowledging NVIDIA's dominance in AI training technology. However, it focuses largely on Intel rather than NVIDIA directly, and there is no direct quote from Jensen Huang or specific details on NVIDIA's AI strategy, supply chain, or competition.

""...customers have been dissatisfied with Intel's performance and conceded that the company is too far behind to catch up with NVIDIA in developing advanced AI training technology.""

1611. Big Technology Podcast

Episode: OpenAI and AMD's Megadeal, Sam Altman and Jony Ive's Bumpy Start. Meta vs. Apple

Date: 2025-10-06 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses the OpenAI and AMD deal and loosely references NVIDIA in the context of its partnership status with OpenAI, noting that NVIDIA's deal is currently only a letter of intent. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"We also have Sam Altman and Jony Ives running into some bumps as they begin to build their AI device and Meta and Apple and maybe Amazon and Google all are basically on a collision course to build the same thing."

1612. overFLOW - noticias tech a diario

Episode: Google se niega a arreglar un error que pone en riesgo tus datos | OVERFLOW 101025

Date: 2025-10-10 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast briefly mentions Jensen Huang of NVIDIA in the context of semiconductor manufacturing and the industry's need to diversify chip production away from Taiwan, but does not provide detailed information on NVIDIA's AI strategy, supply chain, or competition.

"Otras figuras como Lisa Su de AMD y Jensen Juan de NVIDIA tambien han evitado comprometerse del todo con Intel aunque reconocen que en el futuro la industria va a necesitar diversificar la produccion fuera de Taiwan."

1613. Breaking Analysis with Dave Vellante

Episode: 266 | Breaking Analysis | Why Intel Must Stay Independent Spin Out Foundry & Rebuild an Iconic Brand

Date: 2025-02-21 | Relevance: 20/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast discusses Intel's strategy and mentions NVIDIA as one of several hyperscalers potentially involved in a wafer pre-purchase model to sustain a U.S.-based foundry joint venture. However, it does not delve into NVIDIA's AI strategy, supply chain, or competitive positioning in detail.

""...take-or-pay wafer pre-purchase model from hyperscalers, and we're here talking about Amazon, Google, Microsoft, Apple, Meta, and NVIDIA.""

1614. Group Quest

Episode: GQDN 4/16/2025

Date: 2025-04-16 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast segment mentions potential tariffs affecting NVIDIA and a software update addressing graphics card issues, but contains no direct commentary from Jensen Huang on NVIDIA's AI strategy, supply chain, or competition.

"pcgamer and theverge.com were talking about the tariffs that will infect NVIDIA."

1615. Network Break

Episode: NB537: Palo Alto Networks IDs New Market With $25 Billion CyberArk Buy; Intel to Shed Networking Biz

Date: 2025-08-04 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral

Listen to Episode

Summary: The podcast briefly mentions NVIDIA as the primary competitor to Intel in the AI chip market, noting the difficulty for competitors like Intel and AMD to challenge NVIDIA's strong position. There is no direct discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or detailed competitive actions.

""Intel is competing against AMD, Qualcomm, and NVIDIA. That's right. You are correct. NVIDIA. And everybody is competing against NVIDIA right now.""

1616.

Episode: Tesla ,
Date: 2025-02-28 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast primarily discusses Tesla and broader market concerns, with only a brief mention of NVIDIA's earnings report as part of general market commentary. There is no detailed discussion of Jensen Huang's comments on NVIDIA's AI strategy, supply chain, or competition.
" - NVIDIA. ?"

1617. Broken Silicon

Episode: 305. Nvidia RTX 5060 Ti vs AMD RX 9060 XT Tariff Price, Nintendo Switch 2 | Hoeg Law
Date: 2025-04-15 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode includes a brief mention of NVIDIA being challenged by AMD in the gaming market context, but does not specifically discuss NVIDIA's AI strategy, supply chain, or competitive dynamics in detail. The discussion focuses more broadly on the gaming landscape and competitors.
"Valve is apparently going to challenge Windows, supposedly. NVIDIA is being challenged by AMD. A lot is changing."

1618. Broken Silicon

Episode: 326. Nvidia RTX 5080 SUPER Bad Drivers, Intel Panther Lake Leak, RX 9070 GRE, PS6
Date: 2025-09-09 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The excerpt features a general discussion about GPU branding strategies and naming conventions, mentioning NVIDIA primarily as a reference point in comparison to AMD's naming approach, without direct insights into NVIDIA's AI strategy, supply chain, or competition.
"I really hope they do RPX, like 10, 90 XTX or something, something like that, because like, I'm just being honest, there's a part of me that's really worried. They will immediately go to 7,000 so they can say it's bigger than NVIDIA 6,000 series."

1619. Las Mananeras

Episode: Falsa alarma, inflacion bajo control
Date: 2025-07-16 | Relevance: 30/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions the potential impact of new tariffs on microchips, which could affect Nvidia's supply chain through its supplier TSMC, but does not provide a focused discussion on Nvidia's AI strategy, supply chain, or competition.
"Esta diciendo que va a imponer nuevos aranceles sobre los microchips, lo cual pues obviamente esta poniendo bastante a la defensiva a Taiwan Semiconductor Manufacturing Company, que son especificamente quienes producen todos estos microchips que importa NVIDIA."

1620. Uncanny Valley | WIRED

Episode: The Four Criteria for a Tech Bubble
Date: 2025-11-06 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode mentions NVIDIA as part of a broader discussion about AI investment and the possibility of an AI bubble, noting NVIDIA's valuation as a $5 trillion company and its relation to AI infrastructure spending. However, there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"Perhaps he means an insane amount of money for the founders of chipmaker NVIDIA, which just became the world's first $5 trillion company."

1621. Wall Street mit Markus Koch - featured by Handelsblatt

Episode: Trump droht EU mit 200% Zoll auf Wein und Alkohol
Date: 2025-03-13 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA briefly in the context of a proposed joint venture involving Taiwan Semiconductor, AMD, Broadcom, and NVIDIA to operate Intel's manufacturing facilities. There is no in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.
"Unter anderem AMD und Broadcom und Nvidia. Und zwar geht es darum, dass man im Rahmen des Joint Ventures Werke von Intel betreiben konnte."

1622. KACC

Episode: Pivot - AMD CEO Lisa Su on the "Dead Sexy" AI Chips Race - On with Kara Swisher
Date: 2025-05-10 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mainly features AMD CEO Lisa Su discussing the AI chip race and market dynamics, with NVIDIA mentioned as a competitor alongside Intel and new entrants, but without in-depth discussion on NVIDIA's AI strategy, supply chain, or competition

details from Jensen Huang.

"Instead of just two major competitors, Intel and, of course, the now popular NVIDIA, there are a slew of other newcomers in the space to contend with, including in China."

1623. AI Chat: ChatGPT, AI News, Artificial Intelligence, OpenAI, Machine Learning

Episode: Trump's AI Strategy & Policy Changes
Date: 2025-07-23 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions that the Trump administration relaxed restrictions allowing NVIDIA to sell AI chips globally, including to China, but there is no direct discussion of NVIDIA's AI strategy, supply chain, or competition. The focus is primarily on AI policy and the broader industry context.

"He pulled back a bunch of restrictions for NVIDIA to sell AI chips around the globe, basically to China."

1624. No Priors: Artificial Intelligence | Technology | Startups

Episode: Chips, Neoclouds, and the Quest for AI Dominance with SemiAnalysis Founder and CEO Dylan Patel
Date: 2025-08-14 | Relevance: 25/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode features Dylan Patel discussing chips and AI infrastructure broadly, including some mentions of NVIDIA and Intel, but does not provide detailed discussion on NVIDIA's AI strategy, supply chain, or competition. The conversation is mostly general about technology preferences.

"I've just always had Android. Now I've had work iPhones before, but I just really love Android."

1625. The Windows Central Podcast

Episode: Windows delays NVIDIA's Arm chip? + Surface Laptop 5G!
Date: 2025-07-26 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's ARM chip and related news but primarily focuses on Microsoft and Windows updates with only a passing reference to NVIDIA.

"There's some NVIDIA news, NVIDIA Arm chip news and then we'll probably round off the show by talking about some hardware..."

1626. The Everything Feed - All Packet Pushers Pods

Episode: NB544: NVIDIA Buys $5 Billion of Intel Stock; Netskope Rides SASE IPO to an $8.8 Billion Valuation
Date: 2025-09-22 | Relevance: 25/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of a remote code execution vulnerability in an AI tool and an investment NVIDIA made in Intel, but there is no in-depth discussion of NVIDIA's AI strategy, supply chain, or competition.

"There is a remote code execution in an AI tool from NVIDIA."

1627. SGKB DE - der Finanz Podcast

Episode: Nvidia liefert - wie erwartet - EP 185
Date: 2025-08-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode titled "Nvidia liefert - wie erwartet" briefly refers to NVIDIA's financial performance as a highlight of the US earnings season but mainly features a broad discussion of financial markets and other stocks.

"Nvidia, der gefuhlte Hohepunkt der US-Berichtssaison. Und? Nvidia hat geliefert und was machen wir daraus?"

1628. The Financial Exchange Show

Episode: How long until Nvidia buys Intel outright?
Date: 2025-09-18 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of recent stock market movements and semiconductor sector news, but does not provide detailed discussion of Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"Today, coming out of the semiconductor space, which was not in a good spot yesterday on some negative news for NVIDIA. But we've got some other NVIDIA-related news that we're going to get to in just a second once we finish going through markets."

1629. Noticias de Tecnologia Diarias

Episode: NT 428.4 - Nvidia invierte en Intel
Date: 2025-09-25 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Nvidia's $5 billion investment in Intel and their collaboration involving high-speed communication technology. It discusses potential competition with AMD and Broadcom and political aspects related to chip sales to China but lacks direct input from Jensen Huang.

"Nvidia invirtio 5 mil millones de dolares en Intel, convirtiendose en accionista mayoritario y colaborador para el desarrollo de chips para PCs y centros de datos."

1630. The Financial Exchange Show

Episode: Nvidia becomes the first $5T company thanks to the AI rally
Date: 2025-10-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions NVIDIA becoming the first $5 trillion company due to the AI rally, but does not delve into details about Jensen Huang's statements, AI strategy, supply chain, or competition.
"We've got NVIDIA becoming the first $5 trillion company ever."

1631. Venture with Grace

Episode: NVIDIA VP Howard Wright on Accelerating the Global AI Startup Ecosystem
Date: 2025-02-21 | Relevance: 20/100 | Source: SourceSignal.insider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast features NVIDIA VP Howard Wright discussing leadership lessons and personal development, with limited mention of NVIDIA's AI strategy, supply chain, or competition.
"Authentic leadership is what I'm drawn to, authentic leadership is what I try to emulate."

1632. The Next Big Idea

Episode: NVIDIA: Jensen Huang Bet Big on AI. What Comes Next?
Date: 2025-05-15 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mainly provides a biographical account of Jensen Huang's early life and character traits, with only a superficial link to NVIDIA's current status. There is little to no discussion on NVIDIA's AI strategy, supply chain, or competition.

1633. Coder Caffeine

Episode: #424 Jensen Huang Maker Mantra: "Chase Progress, Push Boundaries, Never Arrive!"
Date: 2025-09-13 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: The podcast episode features a motivational quote attributed to Jensen Huang emphasizing continuous progress and self-improvement rather than focusing on rivals, but does not specifically discuss NVIDIA's AI strategy, supply chain, or competition.
"I do not mistake a rival for success. I sharpen myself by stretching every boundary. I thrive in the climb where my growth lives."

1634. Arguing Agile

Episode: AA215 - Why One-on-Ones Still Matter and Why You Should Have Them
Date: 2025-06-04 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Jensen Huang and NVIDIA in the context of leadership style, specifically about not doing one-on-ones, but does not discuss NVIDIA's AI strategy, supply chain, or competition in detail.
"I caught this story about Jensen Huang saying that he doesn't do one-on-ones because it got picked up by the corporate propaganda and kind of sent around to be like, look, this very successful company has a CEO who doesn't understand what one-on-ones are so that you shouldn't do them either."

1635. World Today

Episode: What has driven China's steady economic growth in the first half of 2025?
Date: 2025-07-15 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions Nvidia's upcoming release of the H20 AI chip sales to China following US government approvals within a broader discussion about China's economic growth and trade environment. There is no detailed exploration of Nvidia's AI strategy, supply chain, or competition.
""And Nvidia will soon release H20 AI chip sales to China following US government assurances.""

1636. Investing Experts

Episode: Tech titans' AI strategy
Date: 2025-07-30 | Relevance: 20/100 | Source: SourceSignal.analyst | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast features an analyst discussing investment decisions involving NVIDIA and comparing it with other tech companies like Amazon and Microsoft. The analyst explains why they chose not to invest in NVIDIA due to perceived volatility and valuation concerns at the time.
""I actually looked at both NVIDIA and Amazon at the time. And I decided not to buy NVIDIA because of all the volatility that comes with that space.""

1637. The Last Invention is AI

Episode: OpenAI's Data Center Blueprint
Date: 2025-10-02 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast discusses OpenAI's new data center projects and briefly mentions NVIDIA in relation to funding. There is no detailed discussion on NVIDIA's AI strategy, supply chain, or competition.
"...the impact this has had on Oracle, how NVIDIA is helping to fund this, and a lot more."

1638. ChatGPT: OpenAI, Sam Altman, AI, Joe Rogan, Artificial Intelligence, Practical AI

Episode: The Truth Behind DOGE's AI Strategy
Date: 2025-08-03 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: NVIDIA is mentioned among a list of companies whose AI models are available on a subscription platform, but there is no specific discussion about NVIDIA's AI strategy, supply chain, or competition.
"You get access to Anthropic, Cohere, DeepSeat, Google, Meta, Microsoft, Mistral, NVIDIA, OpenAI, Quen, X, a bunch of image models, a bunch of speech-to-text, a bunch of text-to-speech models, tons of stuff."

1639. AI News Daily

Episode: Google DeepMind Advances 3D AI, US Government Approves AI Vendors, SoftBank Triples Nvidia Stake, ElevenLabs Launches AI Music Tool, and more...
Date: 2025-08-06 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode mentions NVIDIA as a competitor in the AI simulation technology space alongside Google DeepMind and OpenAI, but does not elaborate on NVIDIA's AI strategy, supply chain, or competition specifics.
"In a competitive landscape featuring rivals like NVIDIA and OpenAI, Genie 3's unique combination of real-time interaction and memory capabilities sets it apart from other simulation technologies."

1640. AI Unraveled: Latest AI News & Trends, ChatGPT, Gemini, DeepSeek, Gen AI, LLMs, Agents, Ethics, Bias

Episode: AI & Tech Daily News Rundown: Microsoft is building an AI marketplace for publishers Microsoft claims a 'breakthrough' in AI chip cooling Google launches an AI-powered mood board app & more (Sept 24th 2025)
Date: 2025-09-24 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA as part of the broader AI infrastructure arms race, alongside other major players like OpenAI, Microsoft, and Google. However, there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition, nor any direct quotes from Jensen Huang.

1641. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: EP 462: NVIDIA Inception Startup Spotlight: Turning ideas into products
Date: 2025-02-14 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly mentions the NVIDIA Inception program and discusses how AI enables startups to turn ideas into products. However, it does not provide substantive insight into NVIDIA's AI strategy, supply chain, or competition.
"...talking a little bit about the NVIDIA inception program."

1642. Members Podcast

Episode: Members Podcast - Wednesday 26 February
Date: 2025-02-26 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly anticipates NVIDIA's upcoming earnings results and mentions the current market concerns about big tech, with no detailed discussion of NVIDIA's AI strategy, supply chain, or competition. It also touches on a competitor AI company in China, highlighting growing competition in AI.
"We're in anticipation of the NVIDIA results tonight."

1643. Room to Run

Episode: The Current Thing: AI Bubble, $NVDA, and Options
Date: 2025-08-31 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast mentions Nvidia and its stock briefly within a broader discussion about market sentiment and AI stocks, noting Nvidia's earnings misses and refuting AI bubble claims. However, it does not delve into Nvidia's AI strategy, supply chain, or competition in detail.
"We had numerous earnings misses from key companies like Microsoft and Meta and Amazon and Nvidia."

1644. Closing Bell

Episode: Closing Bell Overtime: Strategy's Michael Saylor; Is AI spending one giant circle? 9/23/25
Date: 2025-09-23 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's stock activity in the context of AI market movements, noting its intraday high and recent price changes, but does not discuss Jensen Huang or specific strategies.

"In terms of other big AI names, NVIDIA, Oracle closing in the red, really weighing on the S&P 500. But NVIDIA did hit an intraday high just yesterday, so context is everything."

1645. Saxo Market Call

Episode: Nvidia earnings incoming and must deliver or else
Date: 2025-02-25 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of upcoming earnings and broader geopolitical and economic issues affecting technology companies, but it does not provide focused discussion on NVIDIA's AI strategy, supply chain, or competition.

"We're going to talk equities today and NVIDIA in particular reporting tomorrow, but just wanted to round this out because, I mean, it really is..."

1646. Everyday AI Podcast - An AI and ChatGPT Podcast

Episode: ChatGPT doubles down on healthcare, Google's shopping and hardware push, and more
Date: 2026-01-12 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast episode briefly mentions NVIDIA in the context of AI advancements, noting that NVIDIA has changed what's possible with AI, but does not delve into specifics about NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA changed what's possible with AI"

1647. GoodNightCoffee

Episode: ():,AI,AI
Date: 2025-09-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt briefly mentions Huawei Cloud's upgraded AI computing capabilities, noting performance comparisons with NVIDIA's H20 chip, but does not provide specific commentary on NVIDIA's AI strategy, supply chain, or competition.

"Huawei Cloud unveiled an upgraded version of its CloudMatrix 384 Supernode, announcing that its new tokens service is now fully operational, with performance up to four times greater than NVIDIA's H20."

1648. NVIDIA AI Podcast

Episode: From Warehouses to Robot Shoppers: Jason Goldberg Talks Retail's AI Makeover - Ep. 286
Date: 2026-01-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast is about AI's impact on retail, hosted by NVIDIA, but without discussing NVIDIA's AI strategy, supply chain, or competition. It focuses mostly on retail experts' perspectives on AI rather than insights from Jensen Huang or NVIDIA leadership.

"And, you know, I talk a lot with my retail clients about personas like the Garcias, the busy family. And the irony is, of course, the personas that many of my retail clients are worried about tomorrow is the NVIDIA microchip."

1649. Chain Reaction

Episode: Supply Chain Disruption in the Age of Uncertainty
Date: 2025-07-19 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.positive
Listen to Episode
Summary: NVIDIA is briefly mentioned as the first $4 trillion company, noted for making AI chips and experiencing a 45% share price increase since early May due to soaring demand. No detailed discussion of NVIDIA's AI strategy, supply chain, or competition is included.

"NVIDIA this week became the first $4 trillion company. They make AI chips. And of course the demand for those has soared and it's seen its share price rise by 45% since early May."

1650. CyberWire Daily

Episode: AI meets the chain of command.
Date: 2025-11-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions a U.S. charge against individuals conspiring to illegally export restricted NVIDIA AI chips to China, indicating a legal issue related to NVIDIA's supply chain and export controls. There is no direct discussion of Jensen Huang or NVIDIA's AI strategy or competition.

"The U.S. charges four individuals with conspiring to illegally export restricted NVIDIA AI chips to China."

1651.

Episode: 220 (17) []
Date: 2025-12-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA as a major customer of TSMC, highlighting TSMC's role in the global semiconductor supply chain. There is no specific discussion of NVIDIA's AI strategy, supply chain issues, or competition.

"It makes chips for big tech companies like Apple and Nvidia. It plays a really important role in a global semiconductor supply chain."

1652. @HPCpodcast with Shahin Khan and Doug Black

Episode: @HPCpodcast-105: Dan Nystedt on Chips, China, AI Tech
Date: 2025-11-14 | Relevance: 10/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast excerpt contains a general discussion about the semiconductor foundry industry and mentions US restrictions on NVIDIA chips limiting China's AI capabilities, but it does not provide direct insights from Jensen Huang or detailed discussion on NVIDIA's AI strategy, supply chain, or competition.

"...the U S seems ahead of China on AI in part because we're denying China access to NVIDIA chips."

1653. Tech and Tales

Episode: #38 Silizium, Sensoren, Software - Wie NXP mit CTO Lars Reger die vernetzte Welt baut.
Date: 2025-07-18 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses chip manufacturing broadly, mentioning NVIDIA mainly in the context of its market value and general interest in chips. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"Also, wenn man sich den Marktwert von Nvidia ansieht. Also das heit, inzwischen interessieren sich alle fur Chips."

1654. Tech News Daily

Episode: Cybersecurity Arms Race Ignites, Tesla Targets Semiconductor Expansion in India, Big Tech Faces $3.8 Trillion Plummet, TikTok and KPDN Launch #ShopSafe, and more...
Date: 2025-04-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast broadly mentions NVIDIA as one of the top tech companies affected by market value drops and tariff impacts, but does not provide focused discussion on NVIDIA's AI strategy, supply chain, or competitive positioning. The mention is embedded within a larger context of sector-wide challenges.

"The tech industry is facing a significant downturn with the combined market value of the top seven tech giants, Apple, Microsoft, NVIDIA, Amazon, Tesla, Google, Alphabet, and Meta, dropping by $3.8 trillion, or 22%."

1655. The John Batchelor Show

Episode: HEADLINE: US Enforcement of New Rules Targeting Adversarial Supply Chains GUEST NAME: Jack BurnhamSUMMARY: John Batchelor speaks with Jack Burnham of the Foundation for Defense of Democracies about the Trump administration's new Commerce and Treasury rule
Date: 2025-10-03 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast includes a general discussion on new U.S. supply chain enforcement rules with a passing mention of NVIDIA as a significant item to track, but does not provide in-depth discussion on NVIDIA's AI strategy, supply chain, or competition.

"There is one particular item that needs to be tracked more than any other. And when we come back, NVIDIA."

1656. Epic Real Estate Investing

Episode: Everyone Laughed at Trump's Tariffs... Until the Factories Turned On | 1474
Date: 2025-04-25 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of a broader discussion about manufacturing and investment in U.S. factories, noting a $500 billion investment in AI supercomputers built in Texas. There is no discussion specifically about Jensen Huang or NVIDIA's AI strategy, supply chain, or competition.

"And NVIDIA, $500 billion on AI supercomputers built in Texas."

1657. AI News Tracker

Episode: AI Industry Surges: Investments, Partnerships, and Global Competition
Date: 2025-10-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast discusses the AI industry's recent trends, including investment, partnerships, and competition. NVIDIA is mentioned indirectly in relation to OpenAI's multi-billion dollar deal with AMD to reduce reliance on NVIDIA's chips, indicating competitive dynamics.

"OpenAI made a significant move by signing a multi-billion dollar deal with AMD to diversify chip suppliers and reduce reliance on

NVIDIA."

1658. Rob Black Show

Episode: Potential China Trade Truce Helps Markets Hit Records
Date: 2025-10-27 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of competition in the AI chip market, noting Qualcomm's new AI accelerator cards as competitors. There is no direct discussion of Jensen Huang's views, NVIDIA's AI strategy, or supply chain details.
"Qualcomm has moved sharply higher after the company unveiled new chip-based AI accelerator cards to compete with AMD and NVIDIA in 2026 and 2027."

1659. Tech News Briefing

Episode: TNB Tech Minute: Alibaba Creates AI Chip to Help China Fill Nvidia Void
Date: 2025-08-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly discusses Alibaba's development of an AI chip to fill the void left by Nvidia's regulatory barriers in China, highlighting the competitive environment but providing no direct comments from Jensen Huang or detailed insights into Nvidia's AI strategy, supply chain, or competition.
"Alibaba was once one of the biggest customers of American AI chip leader Nvidia. Now it and other chip designers are filling the void left after Nvidia ran into regulatory barriers to selling its products in China."

1660. Power Lunch

Episode: 2025 CNBC Stock Draft 4/24/25
Date: 2025-04-24 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode mentions NVIDIA as part of a list of major tech stocks available in a stock draft game, highlighting its market volatility and recent oversold condition. There is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition, nor any direct quotes from Jensen Huang.
""whether it's an NVIDIA, whether it's some of the biggest companies in the world that have actually oversold more than some of the more conservative names, that's what's fascinating about today.""

1661. MRKT Call

Episode: Trading The S&P 500 Futures
Date: 2025-09-03 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: NVIDIA is briefly mentioned among major tech stocks (MAG-7) in the context of stock price movements and comparisons with other large companies, without detailed discussion on its AI strategy, supply chain, or competition.
"I would also notice, Guy, if maybe they want to run through, pull up NVIDIA for a second. We're just going to run through the MAG-7."

1662. Watchdog on Wall Street with Chris Markowski

Episode: Capitalism's Slow Fade: From Free Markets to Statism
Date: 2025-08-13 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The speaker briefly mentions NVIDIA in the context of handling regulatory and tariff challenges but focuses mostly on broader economic and political themes affecting businesses in general.
"NVIDIA can handle it. NVIDIA can handle it."

1663. The Docent Daily Brief, Business Edition

Episode: Business, 8/22/25
Date: 2025-08-22 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast mentions NVIDIA briefly in the context of Jensen Huang's visit to TSMC, highlighting it as part of a broader business and geopolitical discussion but without detailed analysis of NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA CEO Jensen Huang makes a pivotal visit to TSMC, stirring conversation around AI chips."

1664. Bloomberg Tech

Episode: Amazon Shares Soar on Cloud Growth
Date: 2025-10-31 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA CEO Jensen Huang's hopes to sell Blackwell chips to customers in China, alongside discussions about broader tech earnings and AI market trends. The mention is brief and not focused specifically on NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA CEO Jensen Wang still hopes to sell its Blackwell chips to customers in China."

1665. Global Business

Episode: Xi to meet with Trump on Oct 30 in ROK
Date: 2025-10-29 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: Jensen Huang of NVIDIA is mentioned as one of the speakers at the APEC CEO Summit, but there is no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.
"We have chipmaker NVIDIA's founder, Jensen Huang speaking."

1666. (Audio)NEWS/VIEWS/NOVELS

Episode: China in Focus:Trump- We're Well-Equipped to Handle Potential War With China - EpochTV
Date: 2025-03-22 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's announcement to invest heavily in U.S.-based microchip manufacturing, within a broader discussion on US-China tensions and supply chain security. There is no specific discussion of Jensen Huang or NVIDIA's AI strategy, supply chain details, or competitive positioning.
"NVIDIA announcing a plan to invest hundreds of billions in U.S.-based microchip making over the next four years."

1667. The CCP's Global Ambitions + NEWS/VIEWS/NOVELS

Episode: China in Focus:Trump- We're Well-Equipped to Handle Potential War With China - EpochTV
Date: 2025-03-22 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA's announcement to invest heavily in US-based microchip manufacturing as part of a broader US strategy to boost domestic production and reduce reliance on China. However, it does not discuss Jensen Huang or specific AI strategy, supply chain challenges, or competition.
"NVIDIA announcing a plan to invest hundreds of billions in US-based microchip making over the next four years."

1668. Formosa English News

Episode: May. 22, 2025 Formosa Headline News
Date: 2025-05-22 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt briefly mentions NVIDIA's plan to set up a campus in Taipei's Beito Shilin Technology Park, which has sparked some local real estate interest, but provides no discussion on NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA has announced plans to set up a campus in Shilin and Beito, injecting new excitement into the property market."

1669. Squawk Box Europe Express

Episode: European corporate earnings in full swing
Date: 2026-02-04 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of broader market and tech sector news, hinting at upcoming detailed discussion but provides no specific commentary on NVIDIA's AI strategy, supply chain, or competition from Jensen Huang.
"We have got massive market stories and with big ramifications for software, for tech, for the hyperscalers, for NVIDIA, we'll come to that and we'll give it due justice over the next three hours, I promise you."

1670. Bloomberg Tech

Episode: Meta Stock Surges on Plans for Metaverse Cuts
Date: 2025-12-05 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions views from NVIDIA CEO Jensen Huang regarding China potentially not accepting more powerful AI chips, even if U.S. export restrictions are eased. However, the discussion is limited without deep analysis on NVIDIA's AI strategy, supply chain, or competition.
"NVIDIA CEO Jensen Huang is not sure China would accept more powerful AI chips, even if the U.S. relaxes restrictions on the sales."

1671. Marketplace Tech

Episode: Bytes: Week in Review - Tea app data breach, chip exports to China and YouTube rolls out age estimation tech
Date: 2025-08-01 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions that some Congress members are protesting a deal allowing Nvidia to sell its H20 chips to China, but does not provide detailed analysis or commentary on NVIDIA's AI strategy, supply chain, or competition.
"Plus, why some Congress members are protesting a deal with China to allow Nvidia to sell its H20 chips to the country."

1672. The Rundown

Episode: Nvidia Unveils New AI Chips, Market Awaits Fed's Rate Outlook
Date: 2025-03-19 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode includes a brief mention of Nvidia among other tech stocks losing value amid a market downturn. It notes Nvidia's recent announcements and involvement with Taco Bell but provides no detailed discussion about Jensen Huang or Nvidia's AI strategy, supply chain, or competitive position.

"All seven stocks in the Magnificent Seven were down with Nvidia, Meta, and Tesla all losing more than 3%. So this is a very different environment than what we had in 2024."

1673. Bit-Rauschen: Der Prozessor-Podcast von c't

Episode: Windows on ARM - Erfolg oder nicht? | Bit-Rauschen 2025/11
Date: 2025-05-21 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of gaming laptops typically equipped with a separate NVIDIA graphics chip, noting competition from AMD's new offerings but does not discuss NVIDIA's AI strategy, supply chain, or competition in detail.

"das heit die Gerate die typischerweise auch mit einem separaten Grafikchip bestuckt werden fast immer Nvidia"

1674. The Options Insider Radio Network

Episode: The Hot Options Report: 01-15-2026
Date: 2026-01-16 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of options trading activity but does not discuss Jensen Huang or NVIDIA's AI strategy, supply chain, or competition. The excerpt mainly focuses on option market activity for various stocks.

"Each day we'll track down the products that are dominating the options chains and impacting your trading account from NVIDIA to VIX and everything in between."

1675. Computer Corner (5DRadio.com)

Episode: Commputer Corner September 27, 2025
Date: 2025-09-27 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of a new alliance with Intel and potential changes in PC graphics industry. There is a passing mention of NVIDIA and Intel collaborating on PC chips with speculation about timing and impact, but no detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"NVIDIA's alliance with Intel is the end of PC graphics as we know it."

1676. Techstrong Gang

Episode: Techstrong Gang - 3/14/2025
Date: 2025-03-14 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast episode primarily discusses Intel's leadership changes and challenges, with only very brief mentions of Nvidia in relation to a potential joint venture in Intel's foundry business and competitive positioning in AI. There is no direct discussion of NVIDIA's AI strategy, supply chain, or competition from Jensen Huang.

""Reuters reported late last night that Intel's foundry business may be operated by TSMC in a joint venture with Nvidia, AMD and Broadcom.""

1677. Worldwide Exchange

Episode: The New AI Kingmaker, Major Market Warning, Shutdown Stalemate 10/7/25
Date: 2025-10-07 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly mentions NVIDIA in the context of AI chip market competition, highlighting OpenAI's impact and AMD's excitement, but provides no direct commentary from Jensen Huang or detailed discussion of NVIDIA's AI strategy, supply chain, or competition.

"A new Kingmaker, OpenAI sparked a renewed interest in AI chips in an area once dominated by NVIDIA."

1678. Teknoloji Raporu

Episode: Discord Hack: 70.000 Veri Mi Yoksa 2 Milyon Mu? - Hafta 41/2025
Date: 2025-10-12 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
[Listen to Episode]
Summary: The podcast briefly references NVIDIA in the context of an AMD and OpenAI collaboration that might surpass NVIDIA's position, but does not provide detailed discussion on NVIDIA's AI strategy, supply chain, or competition. The mention is peripheral and lacks depth.

"AMD and OpenAI collaboration seems to have made a significant move that might surpass Nvidia, with OpenAI planning to buy hundreds

of thousands of AMD chips over the years."

1679. The AI Daily Brief: Artificial Intelligence News and Analysis

Episode: The State of AI for Robotics
Date: 2025-03-14 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast excerpt primarily discusses Intel's leadership changes and potential joint ventures involving TSMC, with only brief mentions of NVIDIA in the context of a possible shared foundry venture, without direct commentary on NVIDIA's AI strategy, supply chain, or competition.
"TSMC has pitched NVIDIA, AMD, and Broadcom on taking shares in a joint venture that would operate Intel's foundries."

1680. Las Mananeras

Episode: La verdad detras del reporte de empleos
Date: 2025-09-05 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions NVIDIA in the context of stock market performance, noting its recent price decline and comparison with other tech companies. However, there is no discussion about NVIDIA's AI strategy, supply chain, or competition.
"Nvidia cayendo casi 3%, 2.6%. A ver que tal le va y a ver si puede levantar la cabeza el dia de hoy."

1681. Hoje no TecMundo Podcast

Episode: BRASIL NA MIRA dos EUA! PIX em risco?! GIGABYTE com falha GRAVE; iPhone DOBRAVEL e mais!
Date: 2025-07-16 | Relevance: 20/100 | Source: SourceSignal.outsider | Sentiment: Sentiment.neutral
Listen to Episode
Summary: The podcast briefly mentions Nvidia returning to selling AI chips to China after months of restrictions, within a broader discussion of tech news. There is no detailed analysis or mention of Jensen Huang or specific AI strategy, supply chain, or competition.
"...da volta da Nvidia e da AMD vendendo chips de IA para a China apos meses de restricoes..."
