

# Research Unplugged: Gen AI: Catalyst or Culprit? A roadmap for the technology's evolution



In this podcast, we listen in as Kash Rangan, Gabriela Borges, George Tong, and Salveen Richter join Chris Hussey to discuss the path for a \$2 trillion TAM for software, helped by Generative AI applications as Gen AI transitions from the infrastructure build-out phase to the platform and application phase of development. We also discuss real-time use cases that our analysts have delved into across Financials, Healthcare, and throughout Silicon Valley.

*The full list of topics and speakers is below, with approximate start times in parentheses.*

## Speakers:

### (0:33) The Set up

- Kash Rangan – Software Analyst

### (2:57) The Cloud

- Kash Rangan – Software Analyst

### (5:44) What is the potential TAM and ROI?

- Kash Rangan – Software Analyst
- Gabriela Borges – Emerging & Security Software Analyst

### (11:30) Platforms & Applications

- Gabriela Borges – Emerging & Security Software Analyst

### (15:19) Healthcare Opportunity

- Salveen Richter – Biotechnology Analyst

### (19:30) Takeaways from our Silicon Valley AI Field Trip

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- George Tong – Business & Information Services Analyst

### (24:10) Looking ahead: upcoming catalysts

- Kash Rangan – Software Analyst

### (25:39) Questions from the Audience

- All

### (33:24) Stocks to focus on

- All

### Moderator:

- Chris Hussey – US Research Merchandising

### Relevant Research:

- [Gen-AI Part VIII: Catalyst or Culprit?](#)
- [Gen AI Part VII: Takeaways From Our Silicon Valley AI Field Trip](#)
- [Healthcare: Byte-ology: A broadening convergence](#)
- [HealthcaAlre landing page](#)

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- [Research Unplugged: The Next Wave of Innovation: Digging into Artificial Intelligence](#)
- [Research Unplugged: Impact of Gen AI and Other Megatrends on the Talent Sector](#)
- [GS HealthcaAlre Series: Where does AI fit in healthcare? Generate:Biomedicines : Powering Generative Biology with AI/ML](#)



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