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Daily brief · 2026-01-19

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Last 7 daily reports

3 deep-dives you should really read

Stop calling it 'The AI bubble': It's actually multiple bubbles, each with a different expiration date

VentureBeat – AI · Topic: **AI/Cloud/Quantum**

- **What it is:** The AI market is not a single bubble, but rather three distinct layers: wrapper companies, foundation models, and underlying infrastructure, each with unique economic dynamics and market lifecycles.
- **Who:** Key players include vulnerable wrapper companies, precariously positioned foundation model providers like OpenAI and Anthropic, and resilient infrastructure giants such as Nvidia and major cloud providers.
- **What it does:** This framework differentiates AI ventures based on their technological moats, defensibility against commoditization, and susceptibility to absorption by larger platforms, influencing their long-term survival.
- **Why it matters:** Understanding these varying risk profiles and expiration dates is critical for executives to make strategic investment decisions, identify sustainable value, and avoid overvalued segments within the AI ecosystem.
- **Strategic view:** C-level executives must prioritize investments in foundational AI infrastructure and proprietary data integration for enduring value, while exercising extreme caution with easily commoditized application wrappers.

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CEO POV · AI & Space Economy

No CEO statements collected for today.

Patent watch · Compute / Video / Data / Cloud

No relevant patent publications detected for today (EPO / USPTO).

Curated watchlist · 3-5 links per topic

TV / Streaming

No notable articles for this topic today.

Telco / 5G

No notable articles for this topic today.

Media / Platforms

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AI / Cloud / Quantum

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