

Macro Roundup Article

Headline: [Top 10 Charts of 2023](#)

Article Link: <https://www.gspublishing.com/content/research/en/reports/2023/12/29/4756c8be-826e-4a83-aa2b-b98c7cc1ce9d.html>

Author(s)	Jan Hatzius
Publication	Goldman Sachs
Publication Date	January 03, 2024

Tweet: Jan Hatzius @GoldmanSachs argues AI could drive a large capital investment cycle reaching almost 2.5% of US GDP by 2032, up from 0.5% of GDP this year.

Summary:

Related Articles: Microsoft Infrastructure - AI & CPU Custom Silicon Maia 100, Athena, Cobalt 100 and The Race of the AI Labs Heats Up and Will A.I. Transform the Economy, and if So, How?

Primary Topic: Innovation/Research

Topics: Database, Innovation/Research, Investment, Op-Ed/Blog Post, Productivity

Permalink: <https://www.edwardconard.com/macro-roundup/jan-hatzius-goldmansachs-argues-ai-could-drive-a-large-capital-investment-cycle-reaching-almost-2-5-of-us-gdp-by-2032-up-from-0-5-of-gdp-this-year?view=detail>

Featured Image

Link: <https://www.edwardconard.com/wp-content/uploads/2024/01/AI-Drives-Capex.png>