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ChatGPT യിൽ ഇനി Ads?🤔

1 message

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ChatGPT യിൽ ഇനി Ads?🤔

PLUS: Baidu with new AI Chip | L8R by Innov8

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Making Malayalees AI-ready

ChatGPT is getting ads now?"
Yep… leaked code showed "search ad" and "ads carousel," and the whole internet freaked out. 👀

Meanwhile in China, the real battle isn't ads it's GPUs.
Alibaba and ByteDance are training models in Singapore and Malaysia,
DeepSeek is running on a secret Nvidia stash at home,
And Baidu is building its own chips.

The AI race isn't about models anymore it's about **who controls the compute**.

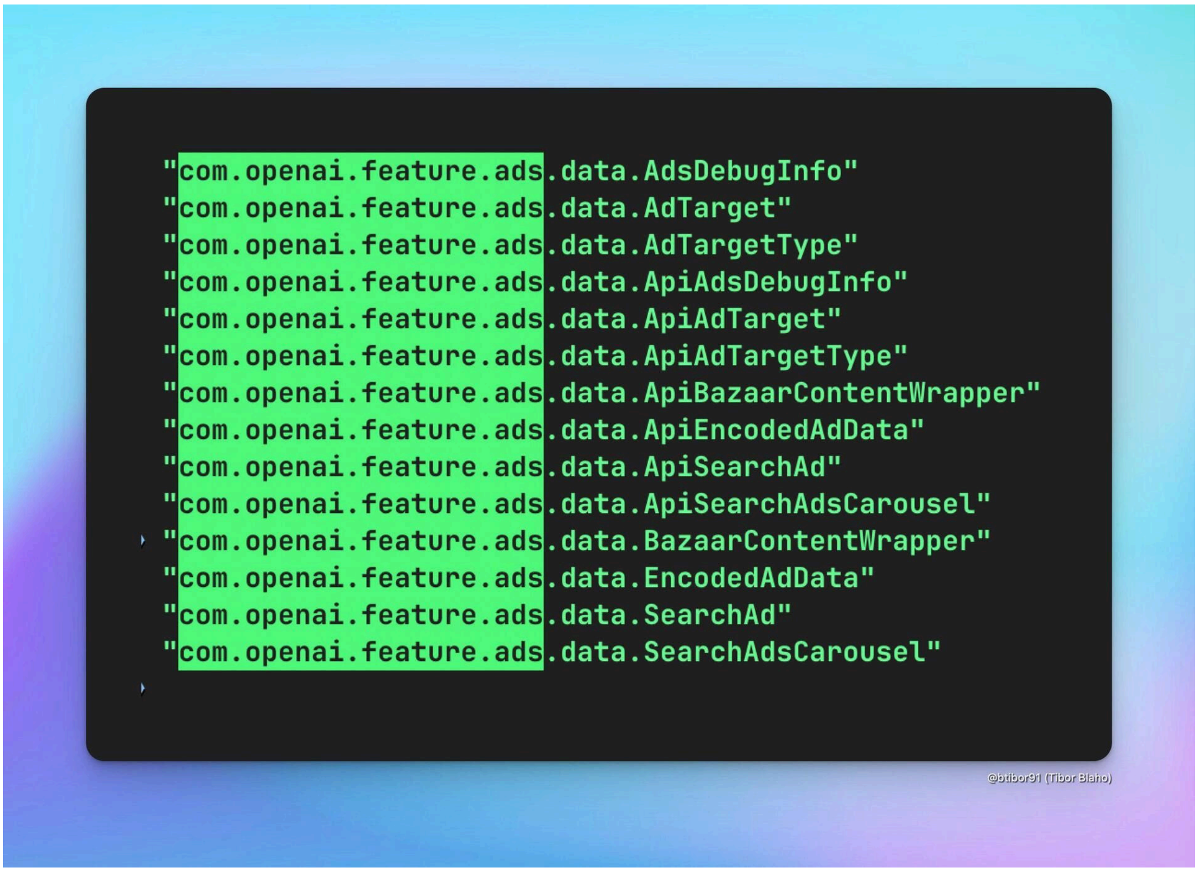
Is AI getting smarter… or just becoming another ad machine?

I'm Alex, Welcome to L8R by Innov8.
Let's DIVE DEEP 🧠 👇

In today's post:

- **Leak: Ads Coming Inside ChatGPT Answers?**
- **China’s AI: GPUs Abroad, Rules at Home**
- **DeepSeek & Baidu: China’s Plan B for AI Chips**

🧠 Leak: Ads Coming Inside ChatGPT Answers?



Right now, ChatGPT feels clean. No ads, no pop-ups.
But a leak from the Android app shows words like **“search ad”** and **“ads carousel.”**
This means OpenAI is getting ready to put ads inside AI answers.

🔍 **Key Points:**

- In October 2025, people found “search ad” code inside the ChatGPT Android beta.
- A leaked money plan says ads for free users could make $1B in 2026 and up to $25B by 2029.
- Sam Altman once said “ads + AI” is a last option and feels scary.
- But OpenAI spends billions to train models and almost a million dollars a day to run ChatGPT.
- New leaders inside the company are hiring people to build an ad system.

📰 **What’s New?**

- OpenAI is clearly building ad tools inside the app.
- Google already shows ads under its AI answers in search.
- Meta is blocking other chatbots like ChatGPT from WhatsApp and Messenger, so only Meta's own AI gets space.

🚨 **Why It Matters**

- People may stop trusting answers if they think money is pushing the result.
- It will be hard to know: "Is this answer best for me, or best for the advertiser?"
- Governments may ask OpenAI to clearly mark sponsored answers and protect user data.

⏭️ **What's Next?**

- First, we may see ads only on questions like "best laptops" or "cheap flights."
- OpenAI also wants a "Commerce in ChatGPT" feature where ChatGPT helps you buy things and takes a fee from the sale.
- Other AI tools may fight back by saying, "We are ad-free and private."

China's AI: GPUs Overseas, Rules At Home

The U.S. is blocking powerful Nvidia chips from going to China.
So big Chinese tech companies are renting GPUs in Singapore and Malaysia.
At the same time, China tells its own government data centres: “Use local chips only.”

🔍 **Key Points:**

- U.S. rules limit high-end Nvidia chips like A100, H100, B200, H20 for Chinese buyers.
- Alibaba and ByteDance now train some AI models in data centres in Southeast Asia.
- These servers are owned by non-Chinese companies, so they avoid some export rules.
- DeepSeek is different: it bought many Nvidia chips early and still trains models inside China.
- China now says state-funded data centres must use Chinese-made AI chips only.

📰 **What’s New?**

- The U.S. also blocks very fast memory, which makes many GPUs slower for AI work.
- China wants “safe and controllable” chips, so it is pushing local hardware.
- Experts say the U.S. has around 10 times more compute than China right now.

🚨 **Why It Matters**

- Compute (GPUs + power) is the new “oil” in this AI race.
- Countries like Malaysia and Singapore get new jobs and money from data centres, but also face pressure from the U.S. and China.
- Until Chinese chips catch up, some Chinese AI models may be smaller or slower than U.S. ones.

⏭️ **What’s Next?**

- The U.S. might try to close more loopholes, including rented compute.
- China will push harder on Huawei, Baidu and other chip makers to go fully local.
- “Compute deals” may become part of big political talks between countries.

DeepSeek & Baidu: China’s Plan B for AI Chips

DeepSeek’s idea: **buy many Nvidia chips early and keep training at home.**
Baidu’s idea: build its own AI chips so it doesn’t need Nvidia at all.
Together, they show how China is planning for a future with **fewer foreign chips.**

🔍 **Key Points (DeepSeek)**

- Before U.S. bans, DeepSeek bought a large number of Nvidia GPUs.
- It trains its big models mostly inside China, keeping data local and private.
- DeepSeek works with Huawei to make its models run well on Huawei’s Ascend chips.
- New versions of DeepSeek models can run on Nvidia, Huawei and other Chinese accelerators with small changes.

🔍 **Key Points (Baidu / Kunlunxin)**

- Baidu's chip arm, Kunlunxin, announced two new chips:
- M100 – for large-scale inference (running AI answers)
- M300 – for both training and inference
- Baidu is also building "Tianchi" super-clusters with hundreds of its own chips linked together.
- China Mobile's suppliers have ordered over 1 billion yuan worth of these chips.
- Analysts think Baidu's chip sales could hit about $1.1B in 2026 and Kunlunxin's value could reach $28B.

📰 **Why It Matters**

- If Nvidia chips stay blocked, China still has a path forward with local chips.
- Baidu uses its chips in its own search engine, cloud, and AI models – end-to-end control.
- Huawei and Baidu competing in chips could speed up local innovation.

⏭️ **What's Next?**

- M100 is planned for early 2026; M300 for early 2027.
- DeepSeek and Huawei may co-design custom chips made just for AI models.
- Baidu must make it easy for developers to move from Nvidia's CUDA world to Kunlun's tools.

🚨 Quick L8R Summary

- **ChatGPT ads leaked:**
A code leak shows "search ads" and an "ads carousel" coming soon meaning sponsored answers may appear inside ChatGPT.
- **China's GPU workaround:**
Alibaba and ByteDance are training models in Singapore/Malaysia to access banned Nvidia chips, while DeepSeek uses its own GPU stash and Baidu builds local chips.
- **Compute is the new battleground:**
The real AI fight isn't models anymore it's who controls the GPUs and data centers powering them.

Ithrollu innathe AI Update.

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Nice One

Hmm Not Bad

Not that Good

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