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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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### 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?

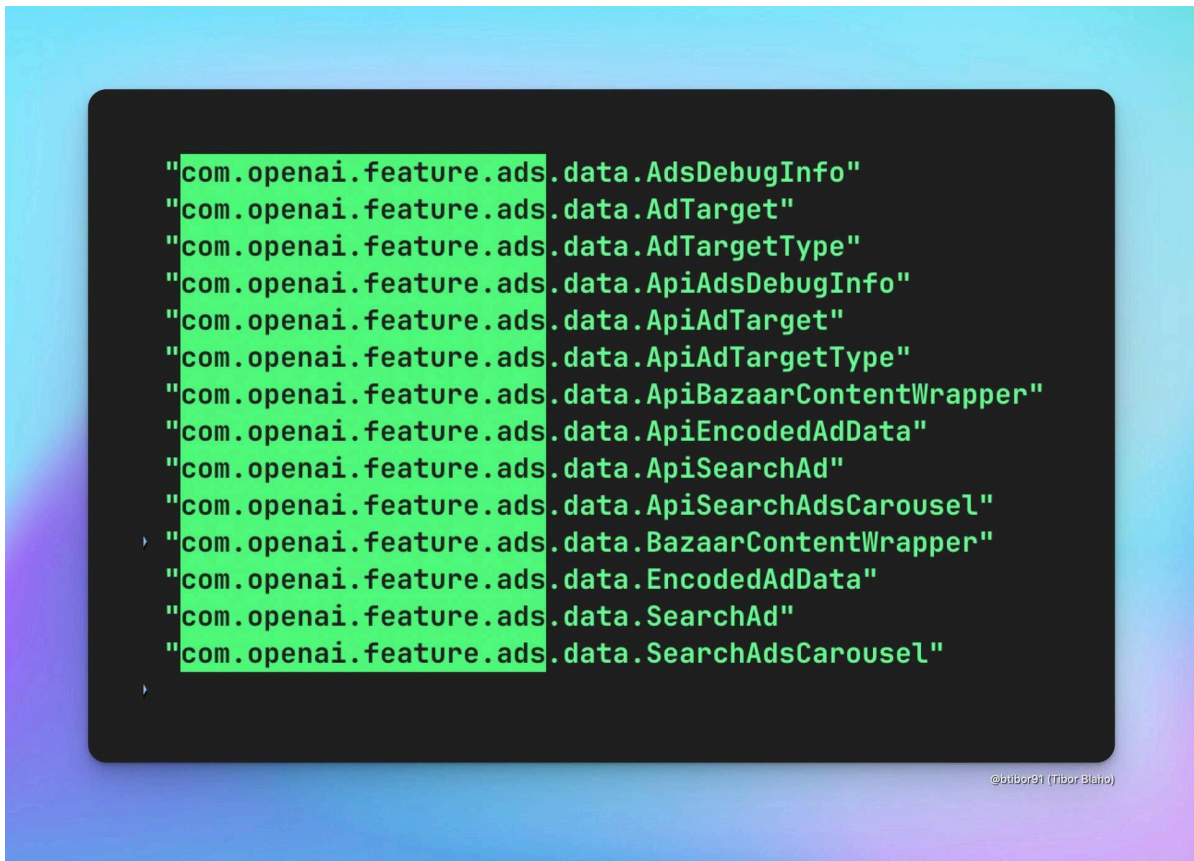
I'm Alex, Welcome to L8R by Innov8.

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."

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## 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**

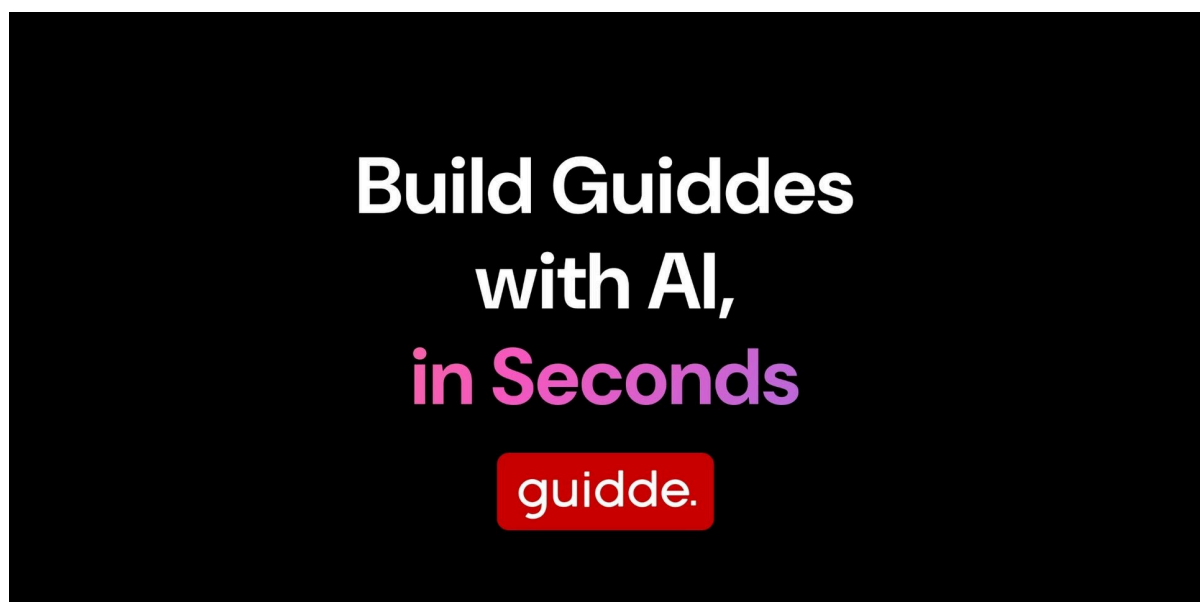
- Compute (GPUs + power) is the new “oil” in this AI race.
- Countries like Malaysia and Singapore get new jobs and money from data centres, but also face pressure from the U.S. and China.
- Until Chinese chips catch up, some Chinese AI models may be smaller or slower than U.S. ones.

#### ▶▶ 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.

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## 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.

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**Innathe L8R engane ondarunnu?**



Nice One

Hmm Not Bad

Not that Good

### Founders, Coaches & Business Owners - Listen up!

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