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JoseMar - July 10, 2025, 7:31 am

Nvidia's AI Revolution Propels It to  
\$4 Trillion Market Cap Under Huang

So here's something I didn't think I'd be typing this soon: Nvidia briefly hit a \$4 trillion market cap.

That number feels fake. Like Monopoly-money-tier fake. But it's very real, at least for a few minutes on Wednesday before it cooled back down to \$3.97 trillion.

Still, let that sink in.

A chipmaker, one that many regular folks hadn't even heard of ten years ago, is now more valuable than entire national stock markets. Yes, it just passed the combined value of all publicly traded companies in the UK. Also, it's worth more than Canada and Mexico's markets put together. Let that one marinate.

What's Driving This?

AI, plain and simple. Nvidia makes the high-performance GPUs that are basically the engine room of generative AI, ChatGPT, Claude, Gemini, you name it. None of that runs without NVIDIA's silicon humming in the background.

Big tech, Microsoft, Amazon, Google, they're buying up those chips like they're toilet paper during a lockdown.

And investors? They're betting big that this gold rush isn't a phase. That AI will keep needing bigger, faster, more power-hungry compute for years to come.

And, well... they might be right.

Nvidia reported \$44.1 billion in Q1 revenue. That's a 69% increase YoY. And they're expecting \$45 billion in Q2. It's hard to argue with growth like that.

Also, just as a fun aside: Nvidia alone now makes up 7.3% of the entire S&P 500 index. Let that number haunt your dreams.

But Wait... Should We Be Worried?

Here's where things get a bit messier.

Pennsylvania (of all places) just threatened to pull out of the regional power grid, and you know what's partly to blame? AI. Or more specifically, the ridiculous energy demand of the data centers running AI models.

New power plants can't be built fast enough. Tariffs, permits, local opposition, it's a mess. Meanwhile, energy prices are spiking, and the grid is creaking under pressure.

So yeah, while Nvidia flies, the infrastructure it relies on is struggling to keep up.

And let's not forget: companies like AMD and Intel are still very much in the race. They're making cheaper, more efficient alternatives. And investors are starting to ask the hard questions: how long can this boom last?

Even within the big tech empires, there's tension. Shareholders are nudging Amazon, Microsoft, and Alphabet to pump the brakes on this all-in AI spending spree.

Is it sustainable? Maybe. But maybe not at this pace.

Here is my final Thought (before this turns into a TED Talk)

Whether you love or loathe the AI hype, you kind of have to respect Nvidia's run. From gaming GPUs to becoming the heart of modern computation? That's one hell of a pivot.

But at some point, gravity kicks in. Right?

Maybe it's not today. Maybe not this year. But tech cycles move fast, and we've seen giants fall before.

Still, right now, Nvidia's riding a wave the size of a continent. And it's going to be fascinating (and probably a little chaotic) to watch what comes next.

Would love to hear your thoughts.

Do you think this is the top? Or just getting started?

? Special Birthday Entry for [7](#) Contest! ?

? Big shoutout to [6](#) for making this even more exciting by adding \$500 extra funds to the prize pool, that's real community spirit right there!?

Hey guys, check this out. Let me know what you think about it!?

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Cheers!