



Semiconductor Weekly News

July 24 – 30, 2026

Nvidia's mega-deals and CXMT's IPO shook markets as hyperscaler capex hit new records

Miki Matsui, Co-Founder, CHIP-J

Sources: Bloomberg, Reuters, CNBC, TechCrunch, and more

Editor's Picks

\$750B

Nvidia's deal wave

Talks to backstop up to \$250B for OpenAI revive “circular AI” fears.

Bloomberg, Jul 27

+472%

CXMT's Shanghai IPO

Record \$8.6B raise; first-day pop hammered memory stocks worldwide.

Yahoo Finance, Jul 27

\$220B

Hyperscaler capex

Amazon lifted 2026 capex; Microsoft's Azure grew 43%.

CNBC, Jul 29-30

AI Chips & GPUs

- **NVIDIA × SK Group: \$500B+ partnership**

SKT to build a 2GW AI cloud in Korea; Vera Rubin + HBM4, live 2027. — NVIDIA, Jul 24

- **A \$250B OpenAI financing backstop in talks**

Among Nvidia's biggest customer deals; fueled the selloff. — Bloomberg, Jul 27

- **AWS custom silicon tops \$25B run rate**

Trainium/Graviton; OpenAI and Anthropic commit gigawatts. — CNBC, Jul 30

- **AI chip stocks rebound after 4-day slide**

SK hynix and Advantest results turned markets on July 29. — CNBC, Jul 27-29

Fab & Supply Chain

- **Samsung posts record ~~₩~~¥89.5T operating profit**
HBM4 to triple in Q3; memory shortage seen through 2028. — Samsung, Jul 30
- **China mass-producing immersion DUV tools**
Deliveries to SMIC and CXMT this year; ASML and toolmakers fell. — The Information, Jul 26
- **Intel cancels Germany and Poland fabs**
Ohio slowed, more layoffs; 14A needs external customers. — TechPowerUp, Jul 24-26
- **Kioxia hits limit-down in Tokyo**
-18% on CXMT and China NAND fears; 60% below June high. — Investing.com, Jul 28

Consumer Chips

- **Qualcomm guides light on memory crunch**

In-line quarter, soft outlook; automotive stayed strong. — CNBC, Jul 29

- **Apple accelerates Mac silicon roadmap**

2nm M6, AI-tuned M7 Pro/Max, A19 Pro MacBook Neo reported. — MacRumors, Jul 24-27

- **Memory inflation reaches devices**

Apple reportedly testing CXMT DRAM for future products. — Bloomingbit, late Jul

Hyperscalers & US Data Centers

- **Microsoft: Azure +43%**

Shares +8% after hours — capex with visible returns. — CNBC, Jul 29

- **Meta: capex raised to \$130-145B**

Shares fell 8% as investors demanded payback proof. — CNBC, Jul 29

- **Amazon: 2026 capex to \$220B**

Higher memory costs; AWS +28%, backlog \$496B. — CNBC, Jul 30

- **Cold water on nuclear-for-AI hype**

Analysis: SMR deals are more PR than delivered megawatts. — Bulletin, Jul 24

AV & Automotive Chips

- **Zoox clears last federal hurdle**

NHTSA exemption allows paid robotaxi rides; Vegas first. — TechCrunch, Jul 30

- **Tesla preps Charlotte robotaxi launch**

Cybercabs staged; head-to-head with Waymo looms. — Axios, Jul 27

- **Qualcomm automotive: \$1.3B (+38%)**

On track to top \$5B this fiscal year on ADAS demand. — CNBC, Jul 29

Chip Startups & Venture

\$300M

Etched

Inference ASICs; Series C at a \$10.3B valuation (Sequoia, a16z).

\$450M

cusp.ai

AI materials discovery; Series B at a \$2.6B valuation.

\$30M

Aeluma

Signed a CHIPS R&D letter of intent (Jul 29).

IPOs held

**Chip
startups**

Listings paused amid the selloff (Morningstar, Jul 28).



Industry Deals & Policy

CHIPS: **\$874M** in R&D letters of intent

7 firms; up to \$300M for GF co-packaged optics; equity stakes too. — NIST, Jul 29

CXMT IPO crystallizes China's memory push

\$8.6B war chest for capacity despite export controls. — Jul 27

China's DUV localization report

Questions the export-control regime; headwind for toolmakers. — Jul 26

NVIDIA × SK: long-term HBM supply locked

From AI factories to next-gen memory co-development. — Jul 24-25

Tariffs, California & China Memory

Tariff watch: no new action this week

25% Section 232 duty on advanced chips (H200 class) stands since Jan 15; Phase 2 expansion decision pending.

California: no related announcements

No AI/semiconductor items from the Governor's office Jul 24-30 (latest: Jun 29 Anthropic partnership).

China memory pressure

CXMT's DRAM share doubled to 8%. SanDisk -12%, Micron -5%, Kioxia limit-down.

Implications for Japan

Memory tightness and China's catch-up now frame Japan's whole supply chain.

Materials makers

Shortage through 2028 lifts wafers and HBM materials: Shin-Etsu, SUMCO, Resonac, Ajinomoto (ABF).

Equipment makers

Advantest hiked full-year guidance; China's DUV push threatens TEL-class China revenue.

Foundry

Intel's 14A struggle is a customer-acquisition lesson for Rapidus; Kioxia slumped, reports Jul 31.

Government

Recheck export controls after the DUV report; US blends subsidies with equity; watch 232 Phase 2.



Sources

Based on reporting and announcements published July 24-30, 2026.

Bloomberg — Nvidia deals, memory cycle

Reuters (via US News) — NVIDIA × SK

CNBC — earnings and markets

The Information (via Yahoo) — China DUV

TechCrunch — Zoox

NVIDIA / Samsung / NIST — primary releases

Yahoo Finance, 24/7 Wall St. — CXMT, memory rout

TechTimes, Investing.com — SK hynix, Kioxia

TechPowerUp, Benzinga — Intel

MacRumors — Apple

Axios Charlotte — Tesla

Crunchbase/Parsers, Morningstar — VC, IPOs

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