Semiconductor Weekly News

October 12 – October 18, 2026

ASML says 2027–28 supply will fall short and TSMC lifts full-year guidance, while AI-infrastructure financing showed strain

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Sources: TSMC, ASML, METI, US Commerce, GlobalFoundries, NVIDIA, AMD, NiSource, Waymo, Gartner, Reuters, Bloomberg and others

Editor's Picks

TSMC Q3 net income +68.7%

$46.7B

[Confirmed] Q3 revenue US$46.72B, 66.4% gross margin, net income up 68.7% YoY; 2nm at 8% of wafer revenue (TSMC, Oct 15)

US-Japan pact's first fabs

$21B

[Confirmed] Three Japanese ministries, Oct 15: mature-node capacity in New York, ~US$10B for the first fab, up to US$21B in all, built and run by GF (METI, Oct 15)

ASML: supply short in 2027–28

€11.7B

[Outlook] The CEO says planned 2027 and 2028 supply "will not fully meet the demand of our customers" (ASML, Oct 14)

1. AI chips and GPUs

Samsung taps TSMC 3nm for NVIDIA HBM dies

[Reported] A Korean daily says Samsung will have TSMC's 3nm make the base dies for NVIDIA's custom NVHBM — the report says it would be Samsung's first use of TSMC at the HBM manufacturing stage. Neither company has commented, and we found only this one outlet (Reuters, Oct 18)

NVIDIA widens CUDA-X across design and fabs

[Confirmed] cuPotential, for atomic and molecular simulation, enters early access. Named adopters include Applied Materials, KLA, Lam Research, Advantest, Synopsys and Cadence. The 30x and 50x speed-ups are the companies' own claims (NVIDIA, Oct 14)

AMD unveils the Helion rack design

[Confirmed] Shown at the OCP Global Summit, with the spec to be contributed to OCP: a CPU-only hyperscale rack on 6th-gen EPYC 9006 "Venice" scaling to 32,768 Zen 6 cores, plus an enterprise version with up to 16 Instinct MI350P GPUs. **[Outlook]** November 2026 availability is reported, not stated on AMD's page (AMD, Oct 12)

2. Fab and supply chain

TSMC raises 2026 growth guidance to 44%

[Confirmed] Q3 revenue NT$1,494.24B (US$46.72B), EPS NT$29.43, 2nm at 8% of wafer revenue. **[Outlook]** Full-year USD growth guidance lifted to 44% from July's "slightly above 40%"; 2026 capex held at US$60–64B (Focus Taiwan, Oct 15)

SK hynix seeks US permits for Dalian tools

[Reported] Reuters says NAND unit Solidigm seeks US approval to install more American tools at its Dalian plant in China, tied to a planned US fab. SK hynix denies the framing: "No capacity expansion is being sought for the Dalian Mod B" (via Tom's Hardware, Oct 16)

CXMT claims a $4F^2$ DRAM launch this year

[Reported] CXMT president Cao Kanyu presented the company's $4F^2$ cell architecture at an Oct 10 conference and said server DDR5 RDIMMs built on it will launch by year-end, Yicai reported. No mass-production date was given (TrendForce, Oct 12)

3. Consumer chips

Jury finds Arm breached Qualcomm's licence

[Confirmed] A Delaware federal jury found Arm breached its architecture licence by withholding software patches and tools, and interfered with Qualcomm's Meta deal. Damages: a nominal US$2. **[Outlook]** The judge must now rule on a five-year royalty-stop clause (Reuters, Oct 14)

Intel reportedly raises Panther Lake prices

[Reported] Taiwan's Commercial Times reports a 15–20% rise from September, apparently concentrated on SKUs with the strongest integrated graphics. Intel has published no price list, this traces to one originating outlet, and OEM volume contracts may not pass the rise through (via Guru3D, Oct 14)

Intel reported to retire SGX for TDX

[Reported] Tom's Hardware reports Intel will end Software Guard Extensions, which protects per-application enclaves, after the Xeon Diamond Rapids generation, consolidating on Trust Domain Extensions, which protect whole virtual machines. Intel has issued no statement (Guru3D, Oct 16)

4. US data centers and energy

Microsoft signs a 20-year NiSource power deal

[Confirmed] About 1,100MW of new generation plus 600MW of storage for its planned La Porte, Indiana campus — new build, not re-contracted capacity, with Microsoft funding the generation and transmission its load needs. **[Outlook]** Service starts 2028 (NiSource, Oct 16)

Gartner warns on AI capex, TrendForce raises

[Outlook] On the same day, Gartner put over US$3.5T of AI infrastructure spending at risk of impairment by end-2030, while TrendForce raised 2027 capex at nine leading cloud providers to above US$1.5T, up 60% YoY. Both are the firms' own forecasts (Gartner, Oct 14)

NTT Data in talks on Anthropic's Osaka site

[Reported] Nikkei says talks are at a final stage to build Anthropic's first data center in Japan, in Osaka Prefecture: up to 500MW, about US$6.3B, partial operation from 2028, agreement targeted within FY2026. Neither company commented (via DCD, Oct 13)

5. Autonomous driving and auto chips

Mercedes and Volvo both widen NVIDIA deals

[Confirmed] Volvo expanded on Oct 15 and Mercedes-Benz on Oct 16, both around NVIDIA Hyperion (sensor and compute), the Alpamayo Stack and Halos; Mercedes pairs them with its MB.OS. **[Outlook]** NVIDIA says they support future SAE Level 4 applications, including robolimousines. Terms undisclosed (NVIDIA, Oct 16)

Waymo targets first Toronto riders in 2028

[Confirmed] Its first Canadian market begins with high-definition mapping of local streets, then testing with trained autonomous specialists behind the wheel, then a validation period. Element Fleet Management handles fleet operations. **[Outlook]** First riders targeted for 2028 (Waymo, Oct 16)

NHTSA reported to probe Tesla's robotaxis

[Reported] Bloomberg says the US National Highway Traffic Safety Administration opened an investigation into Tesla's robotaxi service over allegations the vehicles speed through school zones. We could not retrieve the agency document giving its scope (Bloomberg, Oct 12)

6. Chip startups and venture

Raised **$750M**	Modal — serverless GPU compute platform. **[Confirmed]** Series D led by Accel. US$15.75B is the post-money valuation, not the amount raised (DCD, Oct 16)
Raised **$125M**	Salience Labs — Oxford, UK photonic all-optical switches. **[Confirmed]** Series B led by Bullhound; AMD Ventures and Intel Capital joined. No valuation disclosed (DCD, Oct 16)
Raised **$65M**	Mueon — Portland, Oregon; modular 3D blocks combining compute, memory and power. **[Confirmed]** Series A led by Maverick Silicon with Intel Capital. No valuation disclosed (Ventureburn, Oct 16)
Raising **$600M**	Bedrock Robotics — retrofits construction machinery with autonomy. **[Reported]** A Series C is being raised at about US$3.5B pre-money. Not closed, and the company has not announced it (Axios Pro, Oct 13)
As reported **~$400M**	Winverse AI — stealth Chinese startup building AI for robots. **[Reported]** DeepSeek is said to lead; outlets differ on whether US$400M is the round or the valuation (Bloomberg, Oct 12)

7. Deals and policy

Taiwan to tighten AI chip controls

[Reported] Economy minister Kung Ming-hsin says AI servers and advanced chips join the controlled list, and unlicensed exports to China become a crime. He flagged the law change back in June (TechNews, Oct 16)

Commerce reshuffles GF's CHIPS award

[Confirmed] Up to US$955M moves within GF's existing award — the total does not rise — to silicon photonics, SiGe and advanced packaging in New York and Vermont. GF lifts site capex to US$5B (US Commerce, Oct 14)

EU presses China on an ASML supplier

[Reported] Coatings firm Sindlhauser Materials, an ASML supplier, is said to face shutdown without Chinese rare earths; the EU is negotiating relief. No deal confirmed; single-sourced (Tom's Hardware, Oct 15)

TSMC evaluates a Texas investment

[Reported] The CEO said US customer demand has TSMC evaluating Texas beyond Arizona, that it sent teams there, and that TSMC is open to working with Terafab if any plant is TSMC-run (AP, Oct 15)

8. US policy: states and Congress

California publishes AI public-input results

[Confirmed] The Governor's Office released results from "Engaged California." The most-supported themes: holding AI firms accountable for harm, and protecting people and the environment from AI's resource demands. A consultation, not a regulation (Governor's Office, Oct 13)

Virginia senator proposes a 3-year pause

[Outlook] State senator Russet Perry has proposed Senate Bill 843, which if enacted would bar state agencies from approving data center planning applications for three years from July 1, 2027. One legislator's proposal, not law (DCD, Oct 15)

Senators query Meta's data center credits

[Confirmed] Senate Finance Democrats, joined by Elizabeth Warren, wrote to Meta over reports it treated AI data centers as "pilot models" eligible for the federal research credit — more than US$6.6B of tax relief over three years. An inquiry, not an enforcement action (DCD, Oct 15)

Sources and legend

Certainty legend

[Confirmed] decided or announced fact / [Outlook] forecast, target, guidance / [Reported] media report not confirmed by the company / [Proposal] proposal or recommendation / [Checked] our own primary-source check / [View] our interpretation

- Primary: TSMC, ASML, GlobalFoundries, Japan's METI, US Commerce (NIST/CHIPS), NVIDIA, AMD, NiSource, Waymo, Gartner, TrendForce, Governor Newsom's office, Rapidus
- Press: Reuters (syndicated), Bloomberg, Axios Pro, TechCrunch, DCD, Focus Taiwan, Tom's Hardware, TechNews, Guru3D, Ventureburn, ITmedia, The Information (Gmail, no public URL)
- Window: Oct 12-18, 2026. Items outside it are flagged in the markdown digest and kept off these slides
- Rapidus: no release inside the window; the latest is the Oct 5 CORE announcement (17 design partners, no manufacturing contracts)
- Tariffs: no new Section 232 action, review or rate change found inside the window

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