

Investment in Optical Module Technology

Motor protection controller



Overview

Shares of optical module makers InnoLight and Eoptolink surged over 6% to new highs as 1.6T products enter commercial mass production. Nvidia's \$4 billion investment in optical component suppliers Lumentum and Coherent marks the AI hardware linchpin's commitment to optical networking at a time when AI scaling shifts from compute limitations to interconnect bandwidth constraints inside massive GPU clusters. This deal encompasses. SANTA CLARA, Calif., March 02, 2026 (GLOBE NEWSWIRE) -- NVIDIA today announced multiyear strategic agreements with Lumentum Holdings Inc. (NASDAQ: LITE) to accelerate innovation in advanced optics technologies, including research and development, to enable next-generation AI. Nvidia is investing a combined \$4 billion in Coherent and Lumentum, two photonics companies. Each company will receive \$2 billion each from the chip giant as part of the strategic investment. Jensen Huang, chief executive officer of Nvidia Corp. Nvidia stated that the sum includes a "multibillion-dollar purchase commitment and future access".

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The optics module market is booming, projected to reach \$42 billion by 2033, driven by 5G, cloud computing, and data center expansion. Learn about key market trends, leading ...



In this post I discuss 5 key beneficiaries of the optical industry that I am bullish on and believe sit at the optical bottlenecks. These 5 beneficiaries are Marvell, Lumentum (LITE), Coherent...



NVIDIA to Invest \$2 Billion in Lumentum to Grow Capacity, Advance US-Based Manufacturing and Deepen R& D Collaboration in Data Center Optics SANTA CLARA, Calif. and SAN JOSE, Calif., ...



Driven by accelerating AI infrastructure demand, key optical module stocks like InnoLight and Eoptolink surged after a Huatai Securities report confirmed 1.6T modules have entered ...



Nvidia's \$4B investment in optical component suppliers Lumentum and Coherent heralds an era of optical interconnects inside AI data centers.



(Yicai) April 28 -- Public funds in China continued to invest intensively in shares of companies from the optic communication industry last quarter amid the explosive growth of artificial intelligence models.



Nvidia is investing a combined \$4 billion in Coherent and Lumentum, two photonics companies. Each company will receive \$2 billion each from the chip giant as part of the strategic ...



NVIDIA invests \$4B in optical interconnect supply chain with Coherent and Lumentum to address silicon photonics bottleneck for AI.



Nvidia Corp. today announced plans to invest in Lumentum Holdings Inc. and Coherent Corp., two publicly traded suppliers of optical networking equipment. Each company is set to receive ...



Nvidia injected \$2 billion each into photonics manufacturers Lumentum and Coherent, securing future production capacity and technology rights for advanced optical components with a total investment of ...

Contact Us

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