

AI-03002 AI Adoption Roadmap

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Perfect. Here's a structured AI adoption and investment roadmap tailored to your perspective, connecting your current FTEC holdings to AI trends and future opportunities. I'll break it into three layers: Infrastructure, Platform/AI Development, and Consumer/Enterprise Applications.

1. Infrastructure Layer (Foundational AI Tools)

This is where the "engine" of AI runs. It's analogous to the semiconductor and networking boom in the 90s.

Category	Companies / Examples	Why It Matters
Compute (GPUs/TPUs)	NVDA, AMD	GPUs are critical for training AI models. NVDA dominates AI training; AMD is gaining share.
Cloud Providers	MSFT (Azure), AMZN (AWS), GOOGL (GCP)	Cloud enables scalable AI services. The "compute as a service" model is foundational.
Networking / Data Centers	MSFT, AMZN, Equinix	High-speed networking and data centers are critical for AI data movement and low-latency inference.

Key takeaway: If AI adoption accelerates, demand for NVDA GPUs, cloud computing, and data center infrastructure will grow exponentially.

2. AI Platform / Development Layer

This is where AI frameworks, APIs, and tools reside. Think of it like Windows, Java, or web browsers in the 90s: enabling innovation and adoption.

Category	Companies / Examples	Why It Matters
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AI Platforms & APIs	OpenAI, MSFT (Copilot, Azure OpenAI), Google (Vertex AI)	These platforms provide developers easy access to AI models; they drive adoption.
Enterprise AI Tools	Salesforce (Einstein), ServiceNow, Palantir	These integrate AI into business workflows; they're the "business adoption layer."
Open Source / Frameworks	Meta (PyTorch), Google (TensorFlow)	Open-source frameworks reduce friction for developers, accelerating AI adoption globally.

Key takeaway: AI platforms and frameworks are the "enablers." Even if some startups fail, the underlying ecosystem of tools will stick and expand.

3. Consumer / Enterprise Applications Layer

This is where AI touches everyday life. Analogous to e-mail, web apps, and early e-commerce in the 90s.

Category	Companies / Examples	Why It Matters
Productivity / Office Tools	MSFT Copilot, Google Workspace AI	AI embedded in widely-used software drives mass adoption.
Healthcare & Life Sciences	IBM Watson Health, Tempus, Butterfly iQ AI	AI can improve diagnostics, drug discovery, and workflow efficiency.
Content & Media	Adobe Firefly, Canva, TikTok AI	Consumer apps accelerate engagement and create new markets.
Financial Services	BlackRock AI, fintech startups	AI helps in trading, risk analysis, and fraud detection; huge B2B and B2C opportunity.

Key takeaway: Consumer and enterprise apps are the "visible tip of the iceberg." Adoption here drives demand for infrastructure and platforms above.

Investment / Strategic Perspective

1. Long-term core: Your FTEC holdings (NVDA, MSFT, AAPL) are strong bets on infrastructure and platform dominance. They are the backbone of the AI revolution.
2. Optional tactical exposure: Emerging AI startups, open-source frameworks, or SaaS apps are higher-risk but could become the next "early web giants."

3. Timeline awareness: Adoption may accelerate faster than expected if LLMs, multimodal AI, and generative AI reach widespread consumer/enterprise penetration.
4. Tech synergy: Your understanding of tech history gives you an edge in spotting patterns—like recognizing that infrastructure grows first, then platforms, then applications.

If you want, I can draw a visual AI “stack roadmap” showing the flow from NVDA GPUs → MSFT/Cloud → OpenAI/API → consumer apps, with arrows showing adoption dependencies. That makes it extremely intuitive for spotting the next big moves.

Do you want me to make that diagram?