Lenovo’s Positive AI PC Momentum: Key Considerations for ITADs

Published: 16 August 2024 | Author: David Daoud

I believe Lenovo is the first company to signal positive momentum in the AI PC sector on the front end. Most of the positive news about AI PCs has come from companies that are behind the scenes, like AMD, Nvidia, and others, who are primarily involved in building the technology inside the PC and on the cloud. In fact, Intel spoiled the party with its latest earnings showing negative performance after making so much noise about AI PC is going to be everywhere this year. And so on the PC side, Lenovo seems to be the first one to show some really good news.

My understanding of their earnings presentation [I could not find their earnings transcript anywhere, so I had to go through a full hour of financial presentation without the soda and popcorn, a bit tedious], suggests that the first contingent of AI PCs that saw positive acceptance happened in China. It is likely that the China market was the main driver of Lenovo’s solid performance, confirming what component vendors like Arrow and Avnet reported about Asia being strong.

COMPLIANCE STANDARDS · PULSE

Continue reading with Pulse

This analysis is available to CS Clients and Pulse subscribers.

Already a subscriber? Log in

Subscribe to Compliance Standards' Sector Pulse Research

Contact us at 754.229.0095 or inquiries@Compliance-Standards.com

Our Offices: Boston, MA | 2361 Walnut Court, Pembroke Pines, FL 33026