

Why did optical module companies stock prices fall

The three optical module stocks are attracting market attention due to the surge in demand for optical modules driven by the construction of AI infrastructure. However, the industry is still ...

Applied Optoelectronics (AAOI) reported a wider-than-expected loss and missed revenue estimates for Q1 2026 on May 7, 2026, triggering a sharp stock decline despite a 51% year-over-year ...

He noted, "A company the size of MSFT should be consuming millions and millions of AOCs and other optical modules, especially since MSFT has been one of the early adopters of AI. At ...

In simple comparison, Lumentum's story is capacity--how much capacity unlocks determines how much revenue; Coherent's story is structure--selling the same optical modules, unit ...

Late March, spot memory prices dropped after Google published research on CXL memory pooling and KV cache compression. The market read "AI memory demand will fall."

POET stock crash today: POET Technologies shares have crashed over 47% following the cancellation of orders by Marvell Semiconductor. This significant decline raises investor concerns ...

Applied Optoelectronics (AAOI) stock plunged on profit-taking ahead of tonight's earnings, with Coherent (COHR) and Lumentum (LITE) shares falling in a correlated sector selloff. The optics ...

Optical companies, which are crucial to the semiconductor industry, were also dropping on Monday. Applied Optoelectronics (AAOI) was leading the decline with a 14% plunge.

TFC's stock price plummeted after the GTC conference, opening down more than 10%, hitting a new low, with a market value evaporating by approximately 24 billion yuan.

Extending their slide from Friday, shares of the advanced optical devices manufacturer are on bears' radars after an analyst provided a dour outlook on the stock.

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