

Singer Wealth



The Energy Trade Hiding Under the AI Boom

The smartest money in the room is fighting over the wrong question.

Every investor wants to know which artificial intelligence company wins. ChatGPT or Gemini. Anthropic or xAI. Trillions are moving on that single bet.

Jensen Huang, the founder of Nvidia, just stood up at Davos and suggested we are looking at the wrong floor of the building.

Huang described artificial intelligence as a five layer cake. Energy at the foundation. Chips above it. Cloud infrastructure above that. Models next. Applications at the top. Every headline, every valuation, every venture capital dollar is crowded onto the model layer. The foundation is the floor almost no one is watching.

Goldman Sachs now projects global data center electricity demand will surge roughly 220 percent by 2030. The United States grid alone needs something like 720 billion dollars of new spending to keep up. Data centers already consume around 4 percent of American electricity. By 2030, that share could near 12 percent.

You cannot train a frontier model with a press release. Every chatbot conversation, every image generated, every autonomous decision requires a turbine spinning somewhere in the physical world. Right now we do not have enough of them.

This is where the opportunity becomes obvious.

Independent power producers. Utilities in Virginia, Texas, and the other states where hyperscale data centers are landing. Natural gas infrastructure, because gas fills the gap until new nuclear comes online. Small modular reactor developers. Grid equipment makers building transformers and transmission gear. Uranium miners. Even industrial cooling names keeping the buildings running.

This is not speculation. This is arithmetic. The artificial intelligence economy has to run on something, and that something is electricity.

Model makers will fight it out on the fourth floor. Winners will shuffle every quarter. But the electricity flowing into the building gets consumed no matter who wins. The power producer gets paid whether the query comes from ChatGPT, Gemini or Claude.

Huang told Silicon Valley they are building on the fourth floor of someone else's cake. The smart investor is asking a different question. Who owns the basement.

Have you heard about our Vision Quest Process? Watch the video below to learn more!



We are committed to helping you achieve your financial goals. Please feel free to contact us with any questions, comments, or a more in-depth discussion.

Sincerely,
Keith Singer

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