

# Optical module prices rose in the first quarter

The Zhitong Finance App learned that Cambridge Technology (06166) rose more than 7% in the afternoon. As of press release, it had risen 6.81% to HK\$83.15, with a turnover of ...

In summary, the surging demand for 800G and 1.6T optical modules--driven by AI computing clusters, hyperscale data centers, and next-generation cloud architectures--has positioned high-speed optical ...

GLW Sees Strong Growth in Optical Communications Corning's Optical Communications segment led growth, with first-quarter sales rising 36% year over year to \$1.85 billion.

(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. ...

"More than 10M 400G+ Datacom optical modules shipped last quarter for the first time, breaking \$5B in revenue," said Scott Wilkinson, Lead Analyst at Cignal AI.

GLOBALFOUNDRIES (GFS) has drawn investor attention after launching its SCALE optical module solution for AI focused data centers, alongside first quarter 2026 results that topped ...

SiTime (NASDAQ:SITM) reported a sharp year-over-year increase in first-quarter 2026 revenue and profitability, with management attributing the performance primarily to accelerating ...

Citigroup stated that there is a potential upward trend in demand for optical modules in the industry, and that buying opportunities have increased after the stock price adjustment.

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 ...

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