

April 2024 News Highlights

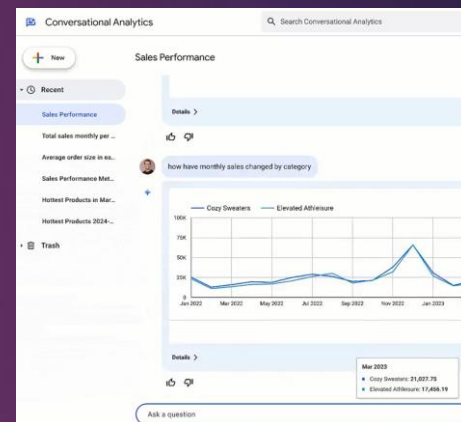
DATA+AI

Google

Google Cloud Next unveiled a number of releases.

- Gemini now can take over 1m tokens (7k words, 11h audio or 1h video).
 - Conversational Analytics is built-in to Looker now and unlocks the value of Data and AI for ease of use.
 - Partnership with Home Depot for vision-based AI instore to help customers & manage stock.
 - Made public 101 AI use cases (some in production, some POC)
- It's expected Google will continue to consume text, audio and video at increasing pace to deliver solutions.

Gemini is the fastest and largest token model available, handling many image inputs simultaneously allowing for complex multi-threaded workflows live.



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meta.ai

Meta just spent over US\$100 million to build Llama 3 - the world's best open source AI model (so far).

- Image creation & short animations are realistic.
- Summaries and analysis on current information is very good.
- No image upload or audio input yet.

Meta plans to invest on AI and its share price down 15% as reported were earnings released. It's expected marketing personalisation and virtual reality will be key focus areas for Meta.

Llama 3 is one of the world's leading LLMs and can deliver incredible results that can improve customer experiences.



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Microsoft

Microsoft's results were big this quarter helped by AI. Azure gained new customers and increased spend per customer. Revenue and Profit up ~20%.

- US\$1b partnership with Coca-Cola on GenAI and 5 year partnership for Copilot.
- Copilot in Windows is now available on nearly 225m PCs.
- GitHub Copilot used by over 1.8 million developers.

It is expected increased adoption of Microsoft Azure (Cloud & AI) based on their leadership position currently.

Microsoft have posted incredible financial results and expect this to continue with extended licences for Copilot enabled features. Workflow and AI is key.



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Snowflake

Snowflake released their first AI engine, Artic. This creates a lower compute requirement model suited for enterprise intelligence, under \$2 million (less than 3K GPU weeks).

Artic is trained on general skills, enterprise skills and then dynamic skills. Open source, similar to Llama 3, but Artic's training compute requirements are over 90% lower.

It's expected Snowflake will continue to grow as a data cloud offering data integration through to app embedding AI.

Snowflake have been slower on releasing their own AI model but have the core foundations (data, apps, integration) to build the data cloud of the future.



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Expressive AI videos

Microsoft allow you to take an image and short audio clip using VASA-1 to create human like videos.

Synthesia have created AI Expressive Avatars using their EXPRESS-1 model. The avatars can perform based on text with the correct tone of voice, body language, and lip sync.

This reduces the costs, adds reuse and the ability to translate into 130 languages. This opens the door to fraud and IP risks.

There needs to be an approach to consider the security risks this may pose to current processes and also benefits for automation of multi-lingual training materials.



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