

Strong start to 2026 and main engines broad-based

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Small- and midcap as well as semiconductors are best performers



A good start is half finished some say. If that's correct then 2026 is confirming the investment roadmap for 2026; AI usage will broaden out and benefit lots of companies with higher productivity and profitability.

Check the Roadmap 2026 for more details



But 2026 has also started out with unusual geopolitical upheaval of unprecedented dimensions; Venezuela, Iran and Greenland as the most visible ones only three weeks into the year....how this all ends no-one knows

Back to the broadbased AI adoption;

The construction of AI infrastructure requires enormous amounts of data memory capacity. In the 1990'ies when PC penetration took a major leap forward then memory chip makers had a very profitable period. The industry was however crowded. Competition and high capital requirements diluted a sustainable industry development.

Later the memory chip industry consolidated into three players; Micron, Samsung Electronics and SK Hynix. The 2020'ies boom seems to be more sustainable and looking at the prices for DRAM's (chart below) then the good times are likely to last in 2026 and 2027.

Samsung Electronics got behind the High Bandwidth Memory (HBM) race, however industry reports suggest they are catching up fast in 2026.

Investors should follow this group as it will serve as a barometer for the AI infrastructure demand and growth prospects

Micron vs selected DRAM prices

