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Global Artificial Intelligence

2026 Citi AI Summit Takeaways

CITI'S TAKE

Over 125 of the leading public and private AI companies, including Anthropic, OpenAI, Google, Amazon, IBM, Broadcom, Cursor, Micron, and others, joined the 4th Annual Citi AI Summit in Menlo Park over the last two days to discuss the future of artificial intelligence. While the dominant theme of the event was acceleration – in both the underlying AI technologies as well as the enterprise adoption of those technologies – that was tempered by cybersecurity concerns created by Anthropic's new Mythos model, constraints in compute capacity limiting AI utilization, and the rising price of frontier models. In the note below, we detail the major themes and investment conclusions from the last two days and share summaries of the 47 keynotes, fireside chats, and panels.

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See Appendix A-1 for Analyst Certification, Important Disclosures and Research Analyst Affiliations.

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