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Silent Giant TSMC Returns to the Peak of its Powers as the AI Boom Continues



TipRanks June 12, 2025 - 5 min read

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AI and U.S. growth stocks have rebounded to record highs after their slump in February and March, rewarding those who bought the dip, especially in the IT and AI sectors. At the heart of this resurgence is Taiwan Semiconductor Manufacturing (TSM), better known as simply "TSMC", the silent powerhouse behind the AI boom. The stock is within grasp of yet another historic high around the \$225 mark.

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https://finance.yahoo.com/news/silent-giant-tsmc-returns-peak-230300515.html?guccounter=1&guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2x1LmNvbS8&guce_referrer_sig=AQAAAGbNeBi6fbz4U1LAPZACoSopXFKhZ2d8Aeym1OTBUscShGSwm5cDQL_KDbidYk16TkPx7YtlzsB2YbOGeGdO4PchwSBFYrk3ftg3HW-MVsPIL1q7mWa7ZR5e6BG0tbKASjEzPE-8r-aiT0KakQ2cXTJpdVs4XTGUVCoXUGiVbDT

Quote Lookup

U.S. markets open in 12m

US	Europe	Asia	Rates	Commodities
S&P Futures 6,333.00 Dow Futures 44,653.00 Nasdaq Fu... 23,169.25 -22.00 (+0.39%) -39.00 (-0.09%) +133.50 (+0.88%)				
Russell 20... 2,264.50 -2.00 (-0.09%)	VIX 16.63 -0.57 (-3.31%)	Gold 3,359.20 +0.10 (+0.00%)		

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Top gainers

MCRB	14.85
Seres Therapeut...	+2.28 (+18.14%)
NBIS	51.95
Nabius Group N.V.	+7.65 (+17.27%)
SMR	42.12
NuScale Power C...	+4.64 (+12.38%)
OKLO	62.41
Oklo Inc.	+6.33 (+11.29%)
TMC	7.28
TMC the metals ...	+0.71 (+10.81%)

Top losers

NEGG	36.22
Newegg Commer...	-13.02 (-26.44%)
WAT	304.18
Waters Corporat...	-48.73 (-13.81%)
CIVI	30.04
Civitas Resource...	-2.30 (-7.11%)
RGEN	121.33
Repligen Corpora...	-8.86 (-6.81%)
GAP	21.43
The Gap, Inc.	-1.40 (-6.19%)

Most active

NVDA	164.07
NVIDIA Corporat...	-0.85 (-0.52%)
NIO	4,1700
NIO Inc.	+0.2700 (+6.92%)
NU	13.07
Nu Holdings Ltd.	+0.24 (+1.87%)
MARA	19.21
MARA Holdings, ...	+0.07 (+0.37%)
PLTR	149.15
Palantir Technolo...	+7.05 (+4.98%)

Earnings events Upcoming No earnings events for this period.

Trending tickers

NVDA	164.07
NVIDIA Corporat...	-0.85 (-0.52%)
JPM	288.70
JPMorgan Chase ...	+1.84 (+0.64%)
AMD	146.24
Advanced Micro ...	-0.18 (-0.12%)
WFC	83.43
Wells Fargo & Co...	+0.88 (+1.07%)
TTD	75.43
The Trade Desk, L...	+0.05 (+0.07%)

Top economic events United St...

CPI MM, SA	Jul 15, 2025, 8:30 AM EDT	Prior: 0.1	New: 0.3
CPI Index, NSA	Jul 15, 2025, 8:30 AM EDT	Prior: 321.46	New: 322.56
CPI YY, NSA	Jul 15, 2025, 8:30 AM EDT	Prior: 2.4	New: 2.7
Core CPI MM, SA	Jul 15, 2025		

TSMC-1078
 TSMC Ltd.
 IPR2025-01211

TSMC produces the chips that drive everything from Nvidia's GPUs to Apple's iPhones, and it's now experiencing accelerated growth fueled by surging AI demand, global factory expansion, and massive capital investment. Despite its strong rebound and concerns about exuberant valuations, TSMC still appears attractively priced. Given how sharply TSM has bounced back, the stock could become the ultimate Tech play, with its best days still ahead.

Jul 15, 2025, 8:30 AM EDT | Prior: 0.1 | Now: 0.2

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AI's Engine Room: TSMC's Chip Dominance

Many tech giants are currently riding the AI wave, but when it comes to TSMC, it's more appropriate to say that the company is steering it. As the world's largest contract chipmaker, it produces the advanced processors that Nvidia, AMD (AMD), and Apple (AAPL) rely on to bring AI to life. In [TSMC's latest earnings call in April](#), CEO C.C. Wei revealed that AI chip revenue, which tripled in 2024, is expected to double again this year.



TSMC CEO C.C. Wei at a news conference at the Presidential Office in Taipei on March 6, 2025

This is currently a major tailwind for TSMC, driving a 41.6% year-over-year revenue surge. Specifically, advanced 3nm and 5nm chips, critical for AI's heavy lifting, made up 73% of wafer sales. With cloud giants like Microsoft (MSFT) and Amazon (AMZN) building AI data centers at breakneck speed, the company's factories are running at full capacity, with no signs that demand is slowing down anytime soon.

Going Global: TSMC's Strategic Power Move

In the meantime, with AI entering the sphere of national security, TSMC has been incentivized to not keep its magic in Taiwan. It's spreading its wings to secure its AI dominance and sidestep geopolitical risks. The company is investing \$165 billion in U.S. factories, with Arizona's first fab already fully booked by heavyweights like Nvidia and Qualcomm (QCOM). Here's how all these giants stack up on TipRanks' stock comparison tool:

Comparison Results

Company	Price	Volume	Analyst Price Target	Analyst Consensus	Smart Score	Market Cap	P/E Ratio	Dividend Yield
TSM	\$172.46	14.51M	\$223.90 (+4.96%/update)	Strong Buy	9	\$906.02B	27.33	0.94%
AMD	\$123.24	41.69M	\$127.92 (-3.87%/update)	Moderate Buy	6	\$199.82B	89.23	—
AAPL	\$202.67	\$4.67M	\$226.94 (+11.98%/update)	Moderate Buy	7	\$3.03T	31.82	0.49%
MSFT	\$470.92	15.38M	\$514.92 (+9.35%/update)	Strong Buy	9	\$3.00T	36.39	0.69%
AMZN	\$171.61	31.30M	\$241.64 (+1.04%/update)	Strong Buy	8	\$2.31T	35.39	—
QCOM	\$159.13	9.07M	\$177.75 (+11.70%/update)	Moderate Buy	7	\$174.72B	16.20	2.19%

TSMC (TSM) stock comparison with AMD, AAPL, MSFT, AMZN and QCOM

Moreover, in Europe, a new \$10 billion plant in Dresden, Germany, and a chip design center in Munich are positioning TSMC to capture the continent's growing AI market. Beyond the motive of diversifying supply chain and hedging geopolitical risk, TSMC has managed to secure long-term, high-value contracts with global tech titans through these moves, as they, in turn, can make such commitments with notably less risk involved.

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