

Samsung Electronics shares fell after a recent growth caused by the news of the Tesla contract by \$ 16.5 billion. Despite the significance of the agreement, investors evaluate the company's prospects with caution due to preserved problems.

The contract with Tesla provides for the supply of new artificial intelligence chips, which, according to Ilon Mask, will be produced at the Samsung factory in Texas. These chips will probably be used in unmanned vehicles, humanoid robots and data centers. However, the timing of the start of supply is still unknown.

Analysts believe that the agreement can strengthen the Samsung business on contract production of microcircuits. Nevertheless, the company is faced with difficulties: in this segment it is significantly lagging behind the market leader - Taiwanese TSMC, and in the memory market - from SK Hynix.

Additionally, Samsung has difficulties with the supply of new HBM chips for NVIDIA. The delays in this direction have already hit financial indicators and put pressure on the shares.