

AI and the Past

**Gen AI** as a concept has seen a large shift in sentiment over the past year; initially the imperfections and the glitches that came with models such as ChatGPT 4o, Claude 4 Sonnet, Gemini 1.5 Pro etc. implied doubt on its future. However, with new models coming such as **Claude Opus, GPT 5, Gemini 2.5 pro and Grok 4** there has been a significant jump in the perceived intelligence and reliability of these new-gen models. These models enable agentic workflows, seamless integration, and diversification beyond text to full video and audio production, delivering **real-world value** for both consumers and enterprises. Agentic AI is leading this race, providing real world solutions to a plethora of problems providing never seen before levels of **automation** and **efficiency** in workflows, AI and its adoption is at breakneck speed, as evidenced by a single customer purchasing **\$10.7 billion** worth of NVIDIA chips in **one quarter**.

Meta’s slow but potent entry into the AI world

While Meta initially seemed to lag behind OpenAI, Google, and Anthropic in the AI race, this was actually strategic patience. Meta released **Llama** as a capable but not industry-leading model, popular among developers for its open-source nature and customization abilities, but lacking the intelligence of competitors' flagship offerings. Rather than rushing to compete when AI reliability was still questionable, Meta was waiting for the technology to mature. Now that AI has reached current reliability standards, Meta has completely reversed course, investing heavily with massive talent acquisition and infrastructure spending to challenge the leaders.

Meta’s AI Spends and Mega Poaching

Over the past 6 months, Meta has aggressively recruited top AI talent from leading companies and established its Super-Intelligence Lab with massive investment commitments. Their AI spending has surged from \$39.2B in FY2024 to a projected \$66-72B in FY2025—a roughly \$30B increase year-over-year. This funds AI servers and multi-gigawatt data centres, targeting 350,000 Nvidia H100 chips by end-2024. Zuckerberg has committed "hundreds of billions" over multiple years for titan clusters, starting with Prometheus in 2026 and the scalable Hyperion facility supporting up to 5 gigawatts.

Attached below is the list of hirings made by Meta for it’s super intelligence lab:

NAME	COUNTRY OF ORIGIN	SOURCE COMPANY	ESTIMATED COMPENSATION	FORMER ROLE/TEAM
RUOMING PANG	China	Apple	>\$200M (multi-year)	Head of Foundation Models Team
ALEXANDR WANG	USA (Chinese desc.)	Scale AI	\$14.3B co. deal, exec pay	Co-founder & CEO
TRAPIT BANSAL	India	OpenAI	~\$100M (multi-year)	Researcher, o-series reasoning models
JACK RAE	UK	Google DeepMind	Not disclosed	Principal Researcher (pre-training)
SHENGJIA ZHAO	China	OpenAI	Not disclosed	Researcher, GPT-4 contributor

<b>JIAHUI YU</b>	China	OpenAI/Google	Not disclosed	Researcher, DeepMind alumnus
<b>LUCAS BEYER</b>	Belgium/Germany	OpenAI/Google	Major offer, \$100M rumours	ViT (Vision Transformer) co-creator
<b>JOHAN SCHALKWYK</b>	South Africa	PlayAI (prev. Google)	Not disclosed	Software Fellow, PlayAI Lead
<b>YUANZHI LI</b>	China	OpenAI	Not disclosed	Researcher
<b>ANTON BAKHTIN</b>	Russia	Anthropic	Not disclosed	Researcher
<b>NAT FRIEDMAN</b>	USA	GitHub/Microsoft	Not disclosed	Former CEO of GitHub, Superintelligence Lab Lead
<b>DANIEL GROSS</b>	Israel	Cue/Apple	Not disclosed	Founder, Superintelligence Lab Leadership

## Poaching from the best at unbelievable prices

Base salary ranges between \$10M-\$100M+ signing bonuses and large RSU grants. Top hires get \$100M-\$300M total packages.

Where They Hire From

- OpenAI: ~40% of AI team hires
- Google DeepMind: ~20%
- Apple: Key leaders like Ruoming Pang
- As well as talent from Anthropic, Scale AI, GitHub

The \$14.3B Scale AI deal (49% stake) landed CEO Alexandr Wang as Meta's Chief AI Officer running their Superintelligence Lab. They are also buying whole startups like PlayAI to get entire teams at once.

## What this means for India?

**Reliance** is partnering with **Meta** in a **₹855 crore** joint venture to build business AI solutions using Meta's Llama models. The 70/30 partnership will create AI services for Indian companies across sales, customer support, and IT operations. By combining Llama's flexible, customizable technology with Reliance's infrastructure at Jamnagar—including data centres, renewable energy, and Jio's network—they can offer AI solutions at lower costs than global cloud providers. This timing works well as Meta heavily invests in AI talent and technology, meaning the partnership will benefit from improving Llama capabilities while giving Indian businesses faster setup, lower costs, and local data hosting. For Reliance this is most likely a strategic answer to perplexity entering the Indian market through airtel and Open AI offering its India tailored plan at ₹399 a month.

**Regards,**  
**Team Sowilo**

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