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The $95 Billion Bet: A Data Study of Meta’s AI Funding Race

Lead Author / Researcher: Alexander Vance & Strategic Intelligence Group

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EXECUTIVE SUMMARY

Meta plans to raise up to $95 billion in its largest-ever equity fundraising to fund AI infrastructure, combining $35 billion launched now with a $60 billion programme planned for 2027, as chip suppliers signal $5 billion of interest and SpaceX lines up a $40 billion chip lease.

KEY RESEARCH FINDINGS & STRATEGIC OUTLOOK

Executive Summary Meta Platforms announced on Monday, October 26, 2026, the largest equity fundraising in its history: a plan to raise up to $95 billion to pay for artificial intelligence infrastructure, data centres and cloud capacity. The figure combines $35 billion in offerings launched immediately with a further $60 billion share-sale programme planned for early 2027, as the company races OpenAI and Anthropic for leadership in personal superintelligence. The announcement matters beyond one company. On the same day, an Apollo Global Management affiliate agreed to buy about $40 billion of AI chips and servers and lease them to SpaceX, while chip suppliers Nvidia, AMD and Broadcom signalled up to $5 billion of interest in Meta’s own shares, according to Reuters reporting of both deals on Monday. Taken together, the deals expose a new arithmetic for the AI boom: the builders of intelligence now need capital on a scale once reserved for oil majors and telecom networks, and they are raising it from equity markets, suppliers and leasing firms at once. This study tests what the numbers actually show. Methodology This study rests on Meta’s October 26 announcement as reported by Reuters, Dow Jones Newswires and the Hindu Business Line, cross-checked against each other on every load-bearing figure. Company statements are treated as claims about intent, not as completed transactions, and the distinction between money launched and money merely planned is preserved throughout. Where coverage disagrees or a figure appears in only one outlet, it is left out. Market reactions are reported from the same trading day, and analyst commentary is attributed by name so readers can weigh it. No figure in this study comes from a single uncorroborated source, and forecasts for 2026 capital spending come from

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