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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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TSM Stock Chart & Stats

Day's Range	$209.96 - $213.23	Market Cap	$906.02B	Beta	1.60
52-Week Range	$133.57 - $226.40	Enterprise Value	$30.41T	Next Earnings	Jul 17, 2025
Previous Close	$207	Total Cash (Recent Filing)	$2.70T	EPS Estimate	2.32
Volume	14.51M	Total Debt (Recent Filing)	$986.98B	Next Dividend Ex-Date	Sep 16, 2025
Average Volume (3M)	12.13M	Price to Earnings (P/E)	26.4	Dividend Yield	0.94%

TSMC (TSM) stock price history over the past three years

Quote Lookup
U.S. markets open in 12m
US Europe Asia Rates Commodities
S&P Futures 6,333.00 +22.00 (+0.35%)
Dow Futures 44,653.00 -39.00 (-0.09%)
Nasdaq Fu... 23,169.25 +133.50 (+0.58%)
Russell 20... 2,264.50 +2.00 (+0.09%)
VIX 16.63 -0.57 (-3.31%)
Gold 3,359.20 +0.10 (+0.00%)
Portfolio
Sign in to access your portfolio
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Top gainers
MCRB Seres Therapeuti... 14.85 +2.28 (+18.14%)
NBIS Nebius Group N.V. 51.95 +7.65 (+17.27%)
SMR NuScale Power C... 42.12 +4.64 (+12.38%)
OKLO Oklo Inc. 62.41 +6.33 (+11.29%)
TMC TMC the metals ... 7.28 +0.71 (+10.81%)
Top losers
NEGG Newegg Commer... 36.22 -13.02 (-26.44%)
WAT Waters Corporati... 304.18 -48.73 (-13.81%)
CIVI Civitas Resource... 30.04 -2.30 (-7.11%)
RGEN Repligen Corpora... 121.33 -8.86 (-6.81%)
GAP The Gap, Inc. 21.43 -1.40 (-6.13%)
Most active
NVDA NVIDIA Corporat... 164.07 -0.85 (-0.52%)
NIO NIO Inc. 4.1700 +0.2700 (+6.92%)
NU Nu Holdings Ltd. 13.07 +0.24 (+1.87%)
MARA MARA Holdings, ... 19.21 +0.07 (+0.37%)
PLTR Palantir Technolo... 149.15 +7.05 (+4.96%)
Earnings events
Upcoming
No earnings events for this period.
Trending tickers
NVDA NVIDIA Corporat... 164.07 -0.85 (-0.52%)
JPM JPMorgan Chase ... 288.70 +1.84 (+0.64%)
AMD Advanced Micro ... 146.24 -0.18 (-0.12%)
WFC Wells Fargo & Co... 83.43 +0.88 (+1.07%)
TTD The Trade Desk, I... 75.43 +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

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.

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

Custom | Overview | TipRanks Essentials | Dividends | Earnings | Technicals | Performance | Add Columns

Name	Price	Volume	Analyst Price Target	Analyst Consensus	Smart Score	Market Cap	P/E Ratio	Dividend Yield
TSM	$212.46	14.51M	$223.00 (4.96%Upside)	Strong Buy	9	$906.02B	27.33	0.94%
AMD	$123.24	41.69M	$127.93 (3.81%Upside)	Moderate Buy	6	$199.82B	89.23	—
AAPL	$202.67	54.67M	$226.94 (11.98%Upside)	Moderate Buy	7	$3.03T	31.82	0.49%
MSFT	$470.92	15.38M	$514.93 (9.35%Upside)	Strong Buy	8	$3.50T	36.39	0.69%
AMZN	$217.61	31.30M	$241.64 (11.04%Upside)	Strong Buy	8	$2.31T	35.39	—
QCOM	$159.13	9.07M	$177.75 (11.70%Upside)	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.

Story Continues

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