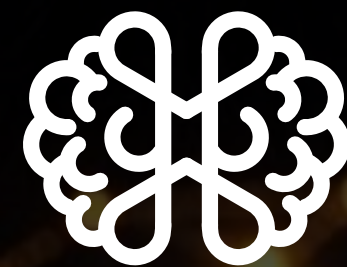


DeepSeek: The AI Disruptor from China



EVERYTHING YOU NEED TO KNOW →

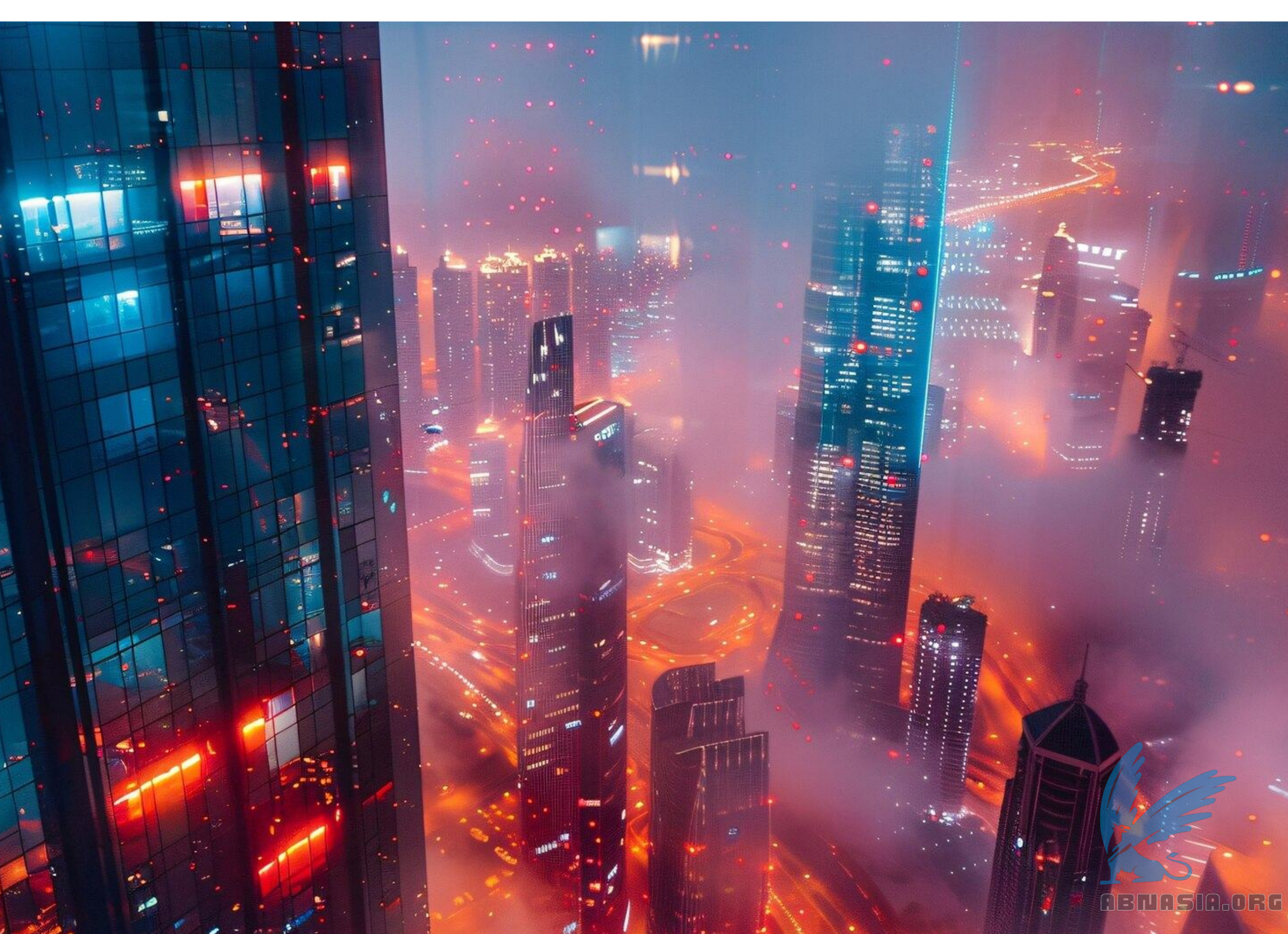
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1. DeepSeek's Silent Rise

China's most low-profile AI startup made headlines with **DeepSeek V2**, slashing AI inference costs and triggering a major price war.



2. The Cost Revolution

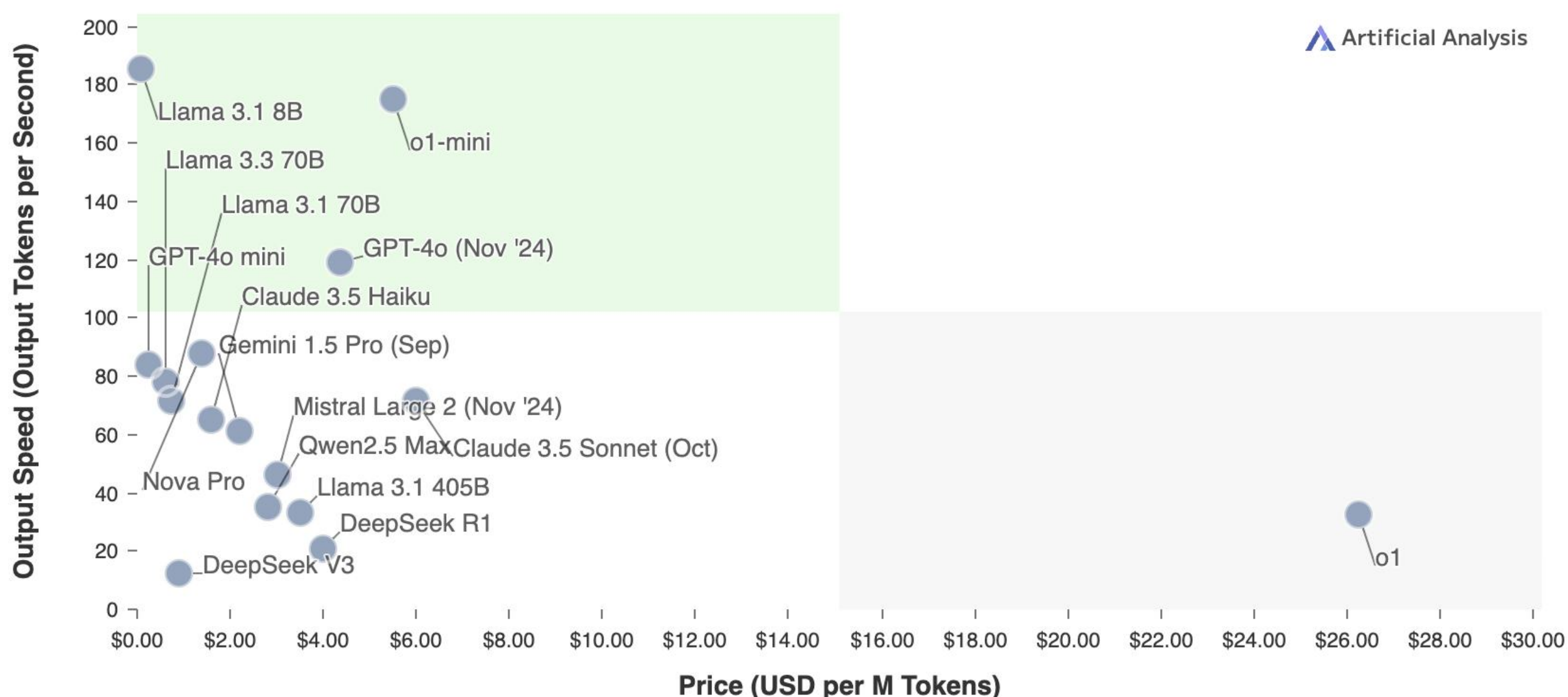
DeepSeek V2 inference costs: ¥1 per million tokens

- 7x cheaper than Llama3 70B
- 70x cheaper than GPT-4 Turbo

Output Speed: Output Tokens per Second; Price: USD per 1M Tokens

Most attractive quadrant

o1 o1-mini GPT-4o (Nov '24) GPT-4o mini Llama 3.3 70B Llama 3.1 405B Llama 3.1 70B
Llama 3.1 8B Gemini 1.5 Pro (Sep) Claude 3.5 Sonnet (Oct) Claude 3.5 Haiku
Mistral Large 2 (Nov '24) Nova Pro DeepSeek R1 DeepSeek V3 Qwen2.5 Max



Source: artificialanalysis.ai

3. Game-Changing AI Innovations

- **MLA (Multi-Head Latent Attention):** Uses just 5-13% VRAM of traditional methods.
- **DeepSeekMoE Sparse:** Minimizes compute costs for maximum efficiency.



4. Global Recognition

- **SemiAnalysis:** “Possibly the best AI paper this year.”
- **Sam Altman (OpenAI):** “Impressive, particularly around what they're able to deliver for the price.”
- **Jack Clark (Anthropic):** “A team of deep-thinking geniuses.”



5. Beyond Copying: A New AI Vision

While most Chinese firms copy Llama, DeepSeek is building new AI architectures aimed at AGI, not just applications.



6. China vs. U.S. AI Efficiency Gap

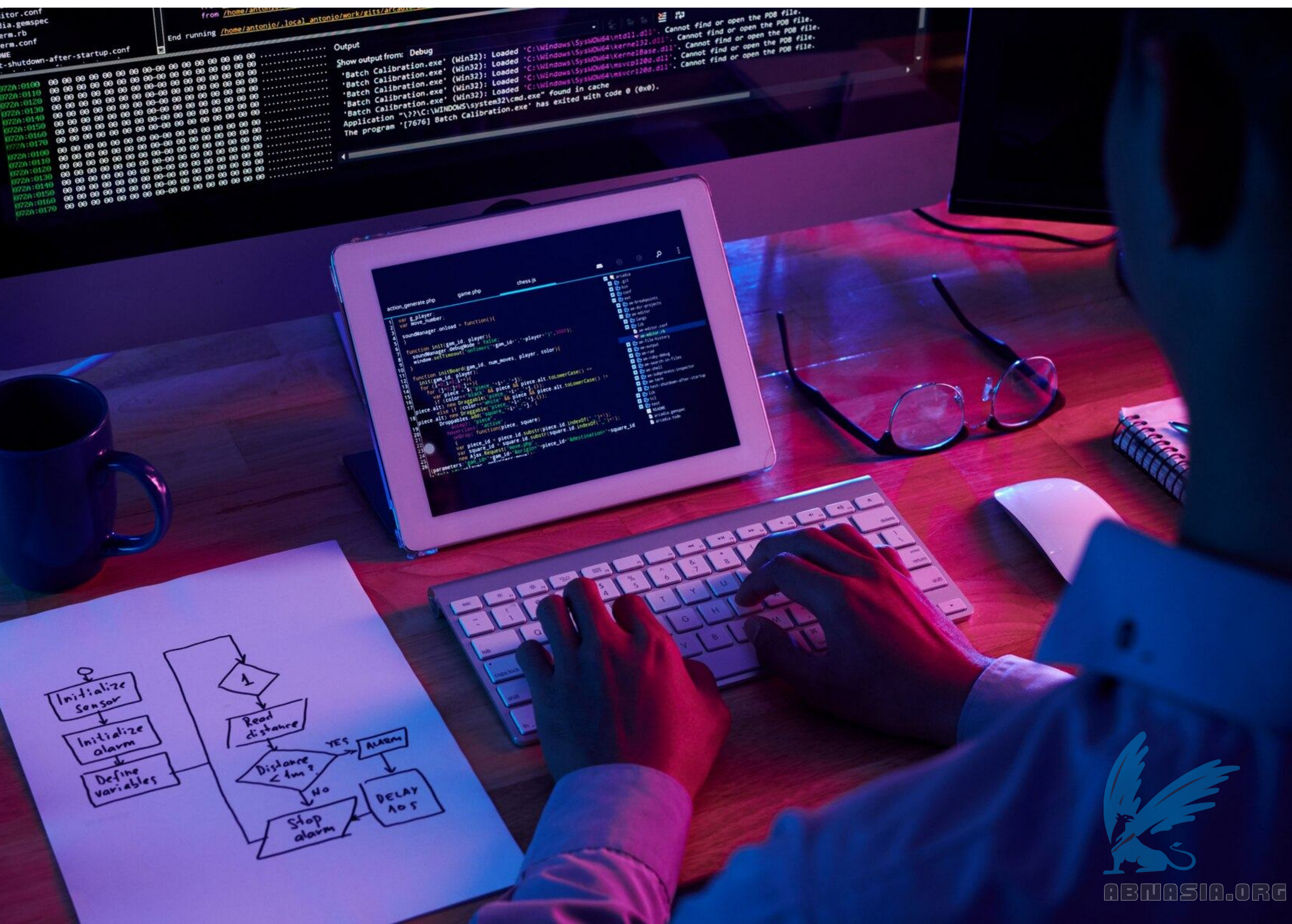
China's best AI models need 4x the compute to match U.S. efficiency due to:

- Training inefficiencies (2x gap)
- Data processing inefficiencies (2x gap)



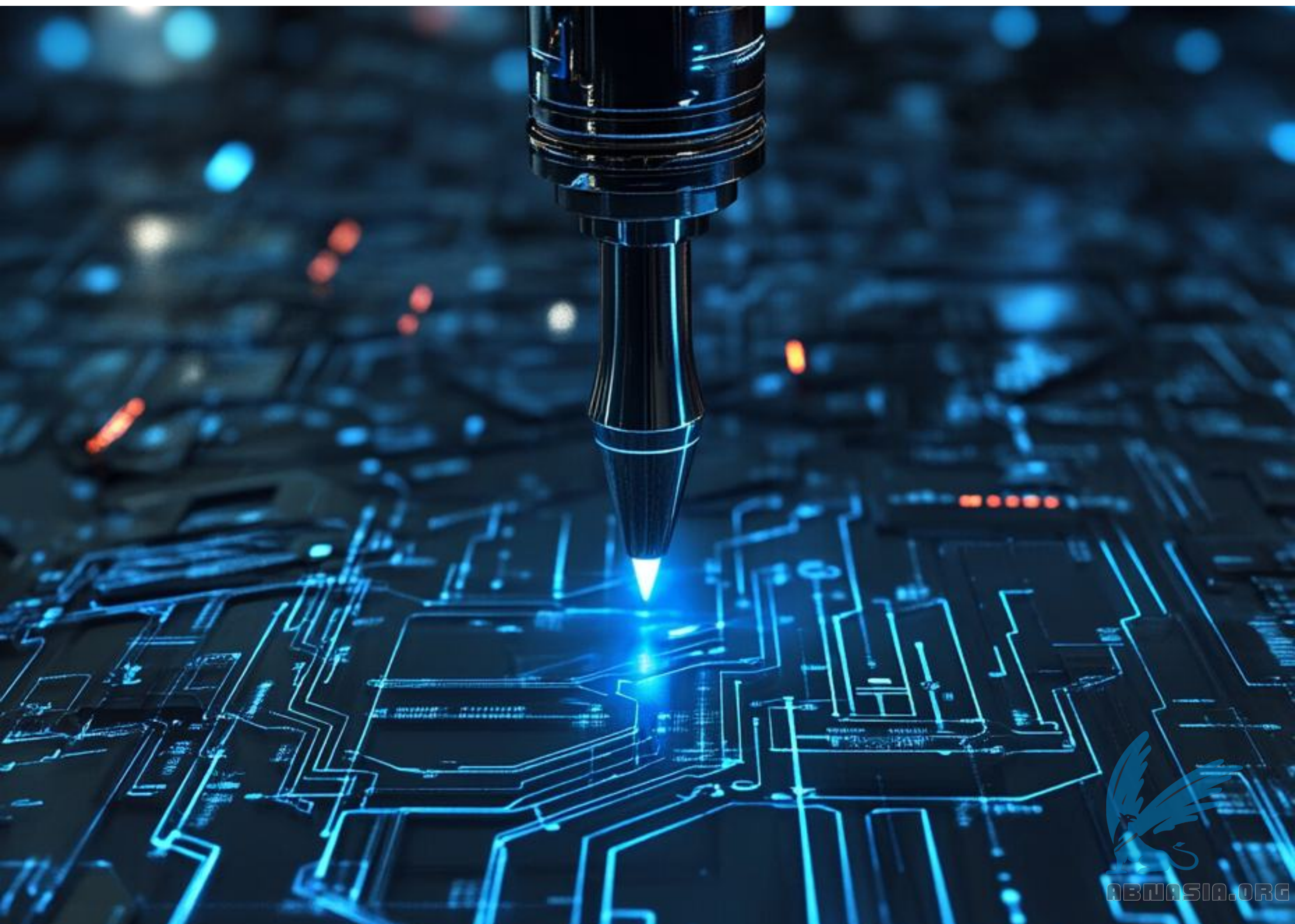
7. Open Source Strategy

- Closed models offer short-term advantages but can't prevent competition.
- Open sourcing attracts top-tier AI talent and accelerates industry progress.



8. No VC, No Distractions, Only Research

DeepSeek refuses funding, focusing entirely on fundamental AI breakthroughs, not quick monetization.



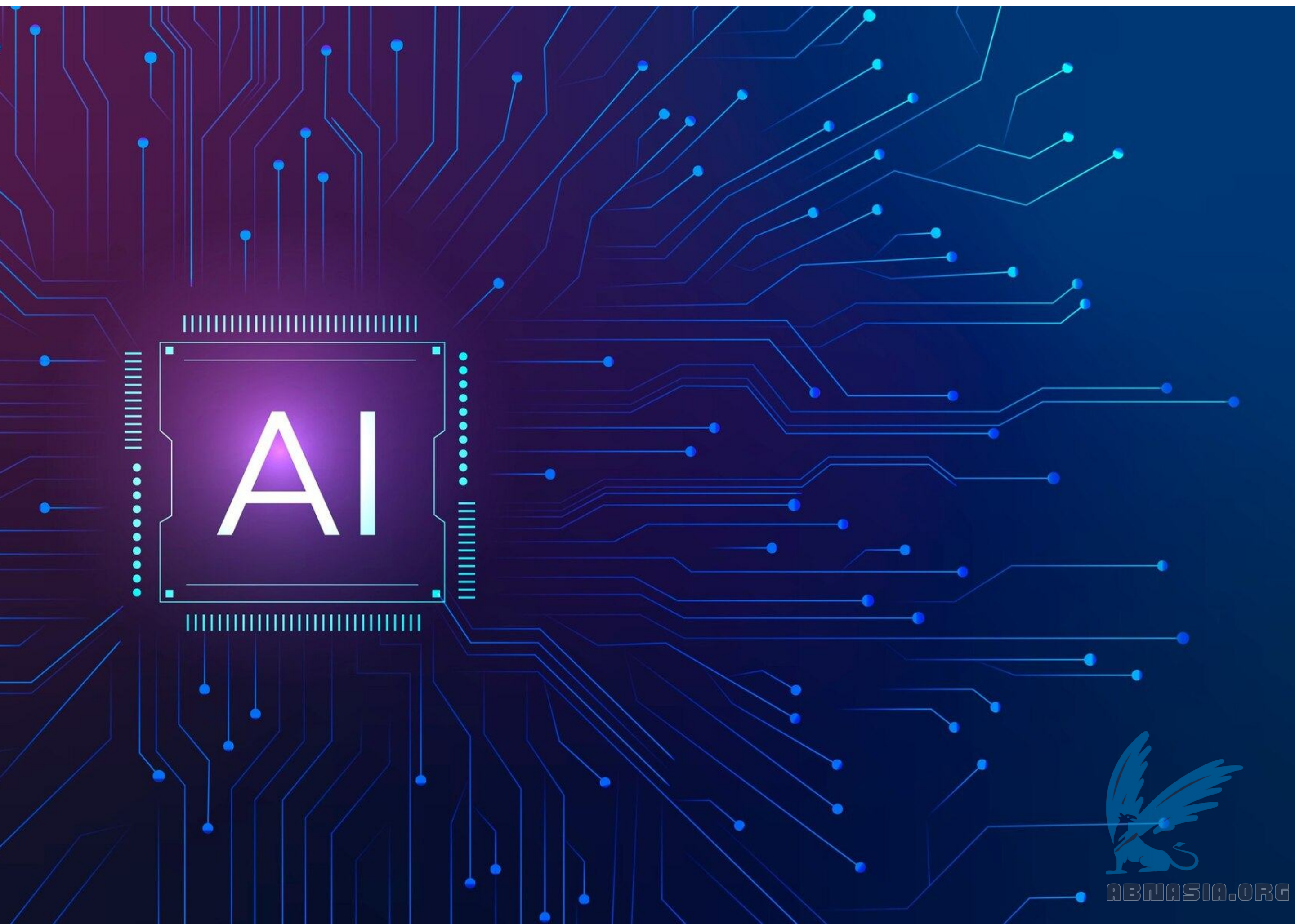
9. Betting on Young Talent

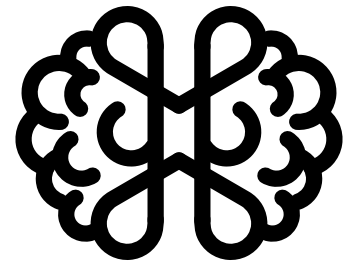
Unlike competitors hiring from Silicon Valley, DeepSeek's breakthroughs come from local PhD students and researchers.



10. The Future of AI: DeepSeek's Roadmap

- Mathematics & Code Generation (AI's 'AlphaGo' moment)
- Multi-modal AI (beyond text)
- AGI through human-like reasoning





👉 **Can DeepSeek redefine China's AI landscape?**

Let's discuss!