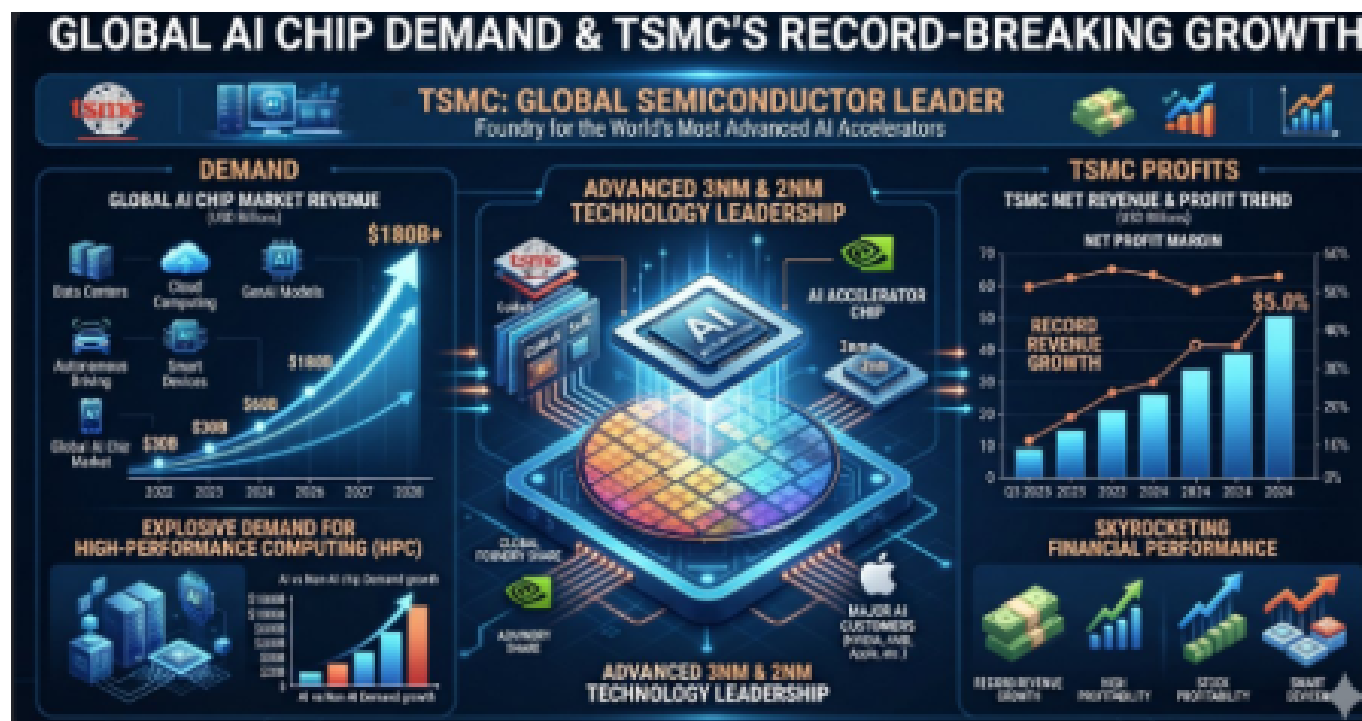


NEWS | TECHNOLOGY

TSMC posts a record \$23.6B profit as AI demand overrides the chip sell-off

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By **Manasee Kurlekar** | October 15, 2026



Chip stocks crash, TSMC's profits don't.

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TSMC's Q3 2026 net profit rose 68.7% to a record NT\$763.1B (about \$23.6B), its sixth straight record quarter, beating the NT\$746.3B consensus.

Revenue was about \$46.7B, up 41% from a year earlier and above its own guidance of \$44.6–45.8B.

Gross margin was 66.4%. Q4 revenue is guided at \$52.3–54.3B. High-performance computing, which includes AI chips, made up 68% of revenue.

TSMC's results show the AI spending is still flowing. The market's worry is not current demand but how long it lasts and who is borrowing to pay for it.

The WBW take

TSMC sits at the narrowest point of the AI supply chain, because almost every advanced AI chip is made in its factories. While it keeps beating its own guidance, claims that AI demand is collapsing are hard to support. What's under pressure is the price investors will pay for these companies, not their earnings.

Read online: <https://worldbusinesswatch.com/news/13/263/tsmc-posts-a-record-23-6b-profit-as-ai-demand-overrides-the-chip-sell-off.html>

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