

EZASSI SIGNALS

Your market, watched.

Name the competitor, technology or regulation that could change your plans. Ezassi Signals tells you what's shifting, how sure we are, and what to do about it — written up and ready to act on, not another feed to read.

2+

independent events behind every signal. One headline is a report, not a signal.

3

confidence bands — with the missing evidence named when a call sits below High.

7

signals from a single cycle on AI rack specification. One is on the next page.

WHAT EVERY SIGNAL GIVES YOU

What we saw

The pattern, built from dated events you can check — not a single press release.

Why it matters

What it means for your products, customers and markets, written against your scope.

How sure we are

High, Medium or Low. And Inconclusive when the evidence doesn't support a call yet.

What to do

A recommended action, so the signal ends in a decision rather than a reading list.

POINT IT AT ANYTHING

Competitor

Where a rival is moving next

Startup

When a new entrant becomes real

Commercial

Whether a technology is taking hold

Research

Whether the science is advancing

Regulatory

What's changing, and when it bites

Not a tool you have to run. The work, done.

Patterns found, weighed and written up against your business — and re-tested every cycle, so a call that stops holding gets re-scored instead of quietly dropped.

A whole component class was deleted from the rack — a year before anyone ordered one.

HIGH CONFIDENCE

Immediate (0–3 months)

Infrastructure & Supply Chain

Status: Review

THE PUBLICATION CLOCK, NOT THE PURCHASE ORDER CLOCK

OCT 2025	MAR 2026	SEP 2026	LATER
Reference design names a central PCB midplane replacing cable-based connections	Developer blog confirms cable-free, hose-free, fanless trays in the same design	Product page still describes cable-free modular trays at production stage	Purchase orders — by which time the component class is already out
Locked out:	cable assemblies in rack-scale GPU systems	Locked in:	PCB midplane, liquid-cooled busbar, blind-mate connectors

How sure: High: four dated primary publications from the architecture owner say the same thing. Status Review because this is one reference design, and whether the same approach is adopted as an open standard is still open.

WHAT WE SAW	WHY IT MATTERS	WHAT TO DO
Four dated NVIDIA publications — October 2025, March 2026, July 2026 and a September 2026 product page — all name a central PCB midplane replacing cable-based connections in the Vera Rubin NVL72 rack, alongside a liquid-cooled busbar and blind-mate connectors.	In this market the reference design runs about a year ahead of purchase orders. A component class named out of the document is out before a single quote is requested — and the parts that replace it are in, on the same date.	Map every product line against the architecture and find which parts still have a role inside a midplane-based interconnect. Then watch whether the design is filed as an open-standard contribution: that filing is the next clock event.
Sources: NVIDIA — gigawatt AI factories (Oct 2025) · NVIDIA developer blog (Mar 2026) · NVIDIA Rubin architecture (Jul 2026) · NVIDIA Vera Rubin NVL72 product page		

This is 1 of 7 signals from one cycle.

The other six cover the open specification moving from v0.5.2 to v0.7.0, the two parallel voltage topologies, the ten named OEM and ODM partners, PCIe 7.0 and CXL 4.0, the protection devices still unqualified, and simulation as the sign-off layer.

See all 7 signals →

Put a watch on your question.