

Quick tech take: Meta Muse

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Launched earlier this month, Meta Muse is an autonomous AI agent designed to handle complex end to end tasks.

1. Generally, consumer facing “free” AI tools generate text responses. However, Muse will execute commands, navigate websites anonymously, and even make phone calls on your behalf.
2. Muse also links across the app ecosystem to automate tasks for you. It can link with email, calendar, food delivery, retail and grocery stores apps, to name a few, to automate everyday tasks. In my time using Muse, I found the quality of the user experience depends on how much access to data users are comfortable allowing. In some cases, Muse can even pay bills if given access to banking credentials. Muse stores personal login details on a separate encrypted ring-fenced tokenized database and doesn’t have visibility to the raw password.
3. I believe this is a big leap forward for Meta which, in my view, has been a secondary player in the AI race despite spending aggressively on compute and talent. With the release of Muse, META is not only justifying their investment in AI but also showing how they can use their vast platform with access to personalized data to drive higher engagement. Given the quality of Muse, my view on Meta has turned incrementally more positive (although we already had overweight exposure to META prior to the Muse release). I believe the Muse product gives META access to high-quality data that they can turn into higher return on their advertising business. I have always struggled to find concrete evidence of value accretion from the consumer segment, but I believe Muse provides green shoots to underwrite further acceleration in Meta’s advertising business.
4. Apart from Meta’s intellectual property around Muse, we can attribute the success squarely on compute and the tool’s popularity will only drive higher demand for other AI infrastructure names. We have maintained our view throughout the year that we are in the early stages of inferencing, and Muse gives us a glimpse of the possibility of inferencing going forward. With end-to-end task completion being a core competency of Muse, it will inherently require more CPU, GPU, and memory. We will also likely see more capable agents released from the other LLMs and as adoption broadens out, the need for compute will continue to compound over the medium term.

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