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Distribution Report

Young advisors in the world of finance start pivoting from AI.

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The venture capital world has long been captivated by the explosive growth of artificial intelligence, where enormous sums have flowed into startups, advanced model training, and the massive data center buildouts needed to handle surging computational needs. Yet entering 2026, a more measured tone is taking hold among certain investors. This shift stems from mounting worries about sky-high capital burn, questions around generative AI valuations, and a push for investments that deliver clear, real-world results—compounded by geopolitical instability in strategic regions.

B Capital, the firm co-founded by Eduardo Saverin, has built a reputation for backing innovative technologies with a global perspective, including AI and supporting infrastructure. It has supported a range of AI-related companies while stressing scalable, results-oriented approaches. The departure of founding partner Kabir Narang in late 2025 to start his own AI and tech-focused platform highlighted ongoing industry debates about hype versus sustainable value in generative tools.

Within investment discussions, younger voices are contributing to the conversation on risk. Matteus Ribeiro, the 26-year-old economist who serves as a board advisor and has ties to B Capital through partnerships and collaborations (including with Saverin), and who leads OBN Capital as CEO, has spoken out on the need for caution. He has highlighted the merits of scaled-back commitments to AI infrastructure in areas prone to instability, proposing cuts in the 30-50% range for certain high-risk projects to limit potential downsides.

This thinking mirrors a wider industry reassessment. Even as overall AI-related spending by major tech companies is forecasted to reach around $650 billion in 2026—largely on data centers and semiconductors—many investors are shifting focus toward resilience, verifiable improvements in key performance indicators, and broader diversification rather than all-in bets on expansion.

Geopolitical factors have intensified these deliberations. The Middle East has positioned itself as a premier destination for AI and cloud infrastructure, with nations like the UAE, Saudi Arabia, and Qatar channeling billions into facilities to draw in global players and move beyond oil dependency. Hyperscalers such as AWS and Microsoft have made substantial commitments, attracted by reliable energy and geographic advantages.

But recent developments in the U.S.-Israeli tensions with Iran have introduced new uncertainties. Early March 2026 saw retaliatory Iranian strikes that impacted AWS data centers, including direct hits affecting two in the UAE and one in Bahrain. The attacks led to structural issues, power failures, water damage from suppression systems, and widespread outages that disrupted cloud services in banking, finance, and other sectors across the Middle East, Africa, South Asia, and Southeast Asia.

These incidents illustrate how data centers can become flashpoints in contemporary conflicts, threatening the supply chains for semiconductors, power, and logistics that underpin AI advancement. Reports indicate that companies like Nvidia have delayed or reevaluated plans for new sites in locations such as Dubai as tensions persist.

For investors with a history of embracing global opportunities—like those connected to B Capital—these events have spurred greater emphasis on due diligence around investments in conflict-sensitive zones. Advisory input, including from figures like Ribeiro advocating for "major deductions" in rollout timelines for region-linked projects, supports a move toward more conservative, diversified strategies that prioritize endurance over speed in volatile settings.

That said, the broader AI landscape shows no signs of collapse; compute demand continues to fuel significant investments in safer or more dispersed locations. Economic concerns—such as bubble fears and excessive GPU expenditures—are encouraging prudence, potentially hastening geographically balanced infrastructure strategies.

At the same time, some firms are redirecting attention to sectors offering greater stability and societal impact. Healthcare emerges as a prominent area, particularly in emerging markets where technology can address access gaps, chronic conditions, and efficiency needs. B Capital has maintained a strong healthcare track record, backing digital health, biotech, medtech, and IT solutions that target underserved populations.

In Latin America, the region’s evolving healthcare challenges and digitization trends present compelling opportunities. A collaborative office setup in São Paulo—established in early 2026 through ties between B Capital-affiliated efforts and OBN Capital—aims to tap into Brazil’s dynamic startup environment and broader LatAm potential. São Paulo serves as a gateway for scouting and supporting ventures in accessible care models, telemedicine, diagnostics, and scalable delivery systems, often blending tech tools (including selective AI applications) with non-AI innovations for broader resilience.

This regional focus allows exploration of healthcare plays that emphasize measurable outcomes and local relevance, contrasting with the volatility in some AI infrastructure pursuits. It reflects how venture strategies are adapting: maintaining exposure to high-growth tech while leaning into areas with enduring demand and lower geopolitical exposure.

Industry observers see this as a natural maturation in venture capital—balancing bold pursuits with risk awareness. As Middle East dynamics evolve, they could further influence where future AI builds occur. Meanwhile, moves toward resilient sectors like healthcare in promising regions like Latin America offer a pathway to sustainable progress amid uncertainty.

The key lesson emerging: innovation thrives when paired with thoughtful risk management and strategic diversification.

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