

NVIDIA and Palantir Bring Sovereign Intelligence to Critical Supply Chains

News Summary:

- Collaboration establishes an AI stack combining Palantir sovereign AI and custom NVIDIA Nemotron open models for complex supply chain operations.
- The AI stack is first being deployed within NVIDIA's supply chain to codify operational intelligence and accelerate the path from wafer to first token.
- Organizations can optimize their own supply chains through the Palantir Sovereign AI Operating System Reference Architecture running on cloud or on-premises infrastructure.

Palantir Technologies Inc. (NASDAQ: PLTR) and NVIDIA (NASDAQ: NVDA) today announced a collaboration to bring sovereign AI to critical supply chains, starting with [NVIDIA's own operations](#).

The deployment creates an AI stack that brings [NVIDIA Nemotron™](#) open models into Palantir Foundry and Artificial Intelligence Platform (AIP), grounded in the Palantir Ontology, which aims to create unprecedented supply chain visibility, identify constraints, continuously codify operational expertise and guide decisions at machine speed -- maintaining the reliability and efficiency of NVIDIA's AI infrastructure supply chain while retaining control and ownership of proprietary data.

The AI stack powering this work and its applications across industries will be showcased in depth at [Palantir's AIPCon 11 conference](#). Organizations across complex industries -- including agriculture, manufacturing, pharmaceutical, retail, technology and governments -- can use the AI stack to optimize their own unique supply chain operations.

NVIDIA operates one of the most complex supply chains, spanning millions of parts, thousands of suppliers and a global network of manufacturing partners. Bringing a rack-scale AI system to production requires the coordinated availability of compute, memory, networking, power, cooling and mechanical components. As demand for AI infrastructure accelerates, NVIDIA works closely with its ecosystem to secure supply for the 1.3 million parts in each [NVIDIA Vera Rubin](#) rack and scale AI infrastructure faster.

"NVIDIA has arguably the most valuable, intricate and complex supply chain in the world. Our sovereign stack, powered by Nemotron models and Ontology, is delivering capabilities that exceed the frontier while providing alpha protection qualities unavailable otherwise," said Alex Karp, cofounder and CEO of Palantir Technologies. "We are very proud of our partnership and its cornerstone role in the sovereign AI revolution."

"Supply chains are the operating system of the physical economy, and AI factories are among the most complex systems ever built," said Jensen Huang, founder and CEO of NVIDIA. "From wafers and components to manufacturing, systems and customer delivery, hundreds of companies and trillions of dollars of global economic activity come together to deliver AI infrastructure. NVIDIA and Palantir are transforming this vast operational graph into sovereign intelligence -- combining NVIDIA Nemotron models with Palantir's Ontology to reason, plan and orchestrate the journey from wafer to token."

Open Models, Customized for Organization-Specific Decisions

Palantir customers can create their own supply chain AI stack by post-training NVIDIA Nemotron with their own data using Palantir Foundry and AIP. Within Palantir AIP, [NVIDIA cuOpt™](#) software unlocks optimizations and scenario planning, enabling teams to model supply constraints, assess tradeoffs and understand the operational impact of allocation decisions. Post-trained NVIDIA Nemotron open models recommend actions, explain tradeoffs and flag emerging risks, while supply chain experts retain control of final decisions.

The new AI stack gives NVIDIA supply chain teams a shared command center to reduce time of ownership, beginning with materials allocation decisions that affect how quickly parts move through the supply chain. The system helps teams identify potential constraints earlier, evaluate alternatives more quickly and allocate materials based on end-to-end production impact.

Open models are central to this approach. Every organization's value chain, supplier network, operating constraints and decision criteria are different; a general-purpose model cannot capture that unique context on its own. By customizing Nemotron open models with proprietary operational data, prepared and augmented using NVIDIA NeMo™ Data Libraries, enterprises can build AI that reflects how their business operates while retaining control over their models, data and deployment environment.

Each recommendation, planner action and production outcome strengthens the system. Integrated with the NVIDIA NeMo AutoModel and NeMo RL libraries, Palantir Autopilot operationalizes that feedback to support continued model improvement. This creates a governed learning loop that preserves operational knowledge, measures decisions against real-world results

and improves the specialized AI models supporting the workflow.

Built for Sovereign, Enterprise-Scale Deployment

The companies plan to extend the learnings from NVIDIA's deployment to help enterprises build more resilient, responsive and intelligent supply chains. Across manufacturing, energy, healthcare, automotive and aerospace, the approach can help turn fragmented operational data into faster, more resilient decisions while retaining control and ownership of proprietary data.

Given the sensitivity and criticality of NVIDIA's supply chain, the deployment runs on NVIDIA reference architectures and the jointly developed [Palantir Sovereign AI Operating System Reference Architecture](#) (SAIOS), which is supported by [Dell Technologies](#) and [Cisco](#).

Every supply chain is different. This AI stack can be deployed on premises with leading system manufacturers including Cisco, and Dell, or in the co-lo and cloud with [Rackspace](#) and Nebius -- enabling organizations to run AI where their data, systems and operational requirements demand it.

About NVIDIA

[NVIDIA](#) (NASDAQ: NVDA) is the world leader in AI and accelerated computing.

About Palantir Technologies Inc.

Foundational software of tomorrow. Delivered today. Additional information is available at <https://www.palantir.com>.

NVIDIA Forward-Looking Statements

Certain statements in this press release including, but not limited to, statements as to: NVIDIA and Palantir transforming operational graph into sovereign intelligence—combining NVIDIA Nemotron models with Palantir's Ontology to reason, plan and orchestrate the journey from wafer to token; expectations with respect to supply chain; expectations with respect to growth, performance, availability, and benefits of NVIDIA's products, services and technologies, and related trends and drivers; expectations with respect to NVIDIA's third party arrangements, including with its collaborators and partners; expectations with respect to technology developments, and related trends and drivers; projected market growth and trends; expectations with respect to AI and related industries; and other statements that are not historical facts are forward-looking statements within the meaning of Section 27A of the Securities Act of 1933, as amended, and Section 21E of the Securities Exchange Act of 1934, as amended, which are subject to the "safe harbor" created by those sections based on management's beliefs and assumptions and on information currently available to management and are subject to risks and uncertainties that could cause results to be materially different than expectations. Important factors that could cause actual results to differ materially include: global economic and political conditions; NVIDIA's reliance on third parties to manufacture, assemble, package and test NVIDIA's products; the impact of technological development and competition; development of new products and technologies or enhancements to NVIDIA's existing products and technologies; market acceptance of NVIDIA's products or NVIDIA's partners' products; design, manufacturing or software defects; changes in consumer preferences or demands; changes in industry standards and interfaces; unexpected loss of performance of NVIDIA's products or technologies when integrated into systems; NVIDIA's ability to realize the potential benefits of business investments or acquisitions; and changes in applicable laws and regulations, as well as other factors detailed from time to time in the most recent reports NVIDIA files with the Securities and Exchange Commission, or SEC, including, but not limited to, its Annual Report on Form 10-K and Quarterly Reports on Form 10-Q. Copies of reports filed with the SEC are posted on NVIDIA's website and are available from NVIDIA without charge. These forward-looking statements are not guarantees of future performance and speak only as of the date hereof, and, except as required by law, NVIDIA disclaims any obligation to update these forward-looking statements to reflect future events or circumstances.

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Palantir Forward-Looking Statements

This press release contains forward-looking statements within the meaning of Section 27A of the Securities Act of 1933, as amended, and Section 21E of the Securities Exchange Act of 1934, as amended. These statements may relate to, but are not limited to, Palantir's expectations regarding the amount and the terms of the contract and the expected benefits of Palantir's software platforms. Forward-looking statements are inherently subject to risks and uncertainties, some of which cannot be predicted or quantified. Forward-looking statements are based on information available at the time those statements are made and were based on current expectations as well as the beliefs and assumptions of management as of that time with respect to future events. These statements are subject to risks and uncertainties, many of which involve factors or circumstances that are beyond Palantir's control. These risks and uncertainties include the ability to meet the unique needs of customers; the failure of Palantir's platforms to satisfy customers or perform as desired; the frequency or severity of any software and implementation errors; Palantir's platforms' reliability; and customers' ability to modify or terminate the contract. Additional information regarding these and other risks and uncertainties is included in the filings Palantir makes with the Securities and Exchange Commission from time to time. Except as required by law, Palantir does not undertake any obligation to publicly update or revise any forward-looking statement, whether as a result of new information, future developments, or otherwise.

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