Nvidia has a Jensen Huang problem—and no obvious successor

The investigation of Jensen Huang by Nvidia’s board threatens the future of one of Silicon Valley’s longest-serving executives and a key enabler of the AI boom, who has no obvious successor as leader of the world’s second-most-valuable company.

Huang is fighting for survival after admitting to an extramarital affair, believed to be with an executive at a large Nvidia customer whom US officials also allege was working as a Chinese spy.

The prospect that Huang could be forced out as chief executive of the US chipmaker he co-founded more than 30 years ago has alarmed investors and allies in the tech industry. Shares in Nvidia, which late last month ceded its position as the world’s most valuable to Apple amid a broader sell-off in AI stocks, had fallen more than 5 percent by midday trading on Monday.

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