# Institutional Holdings in Optical Modules



## Overview

Lumentum is a global leader in optical and photonic technologies that power the networks and infrastructure behind AI, cloud computing, and next-generation communications.

## Key Takeaways

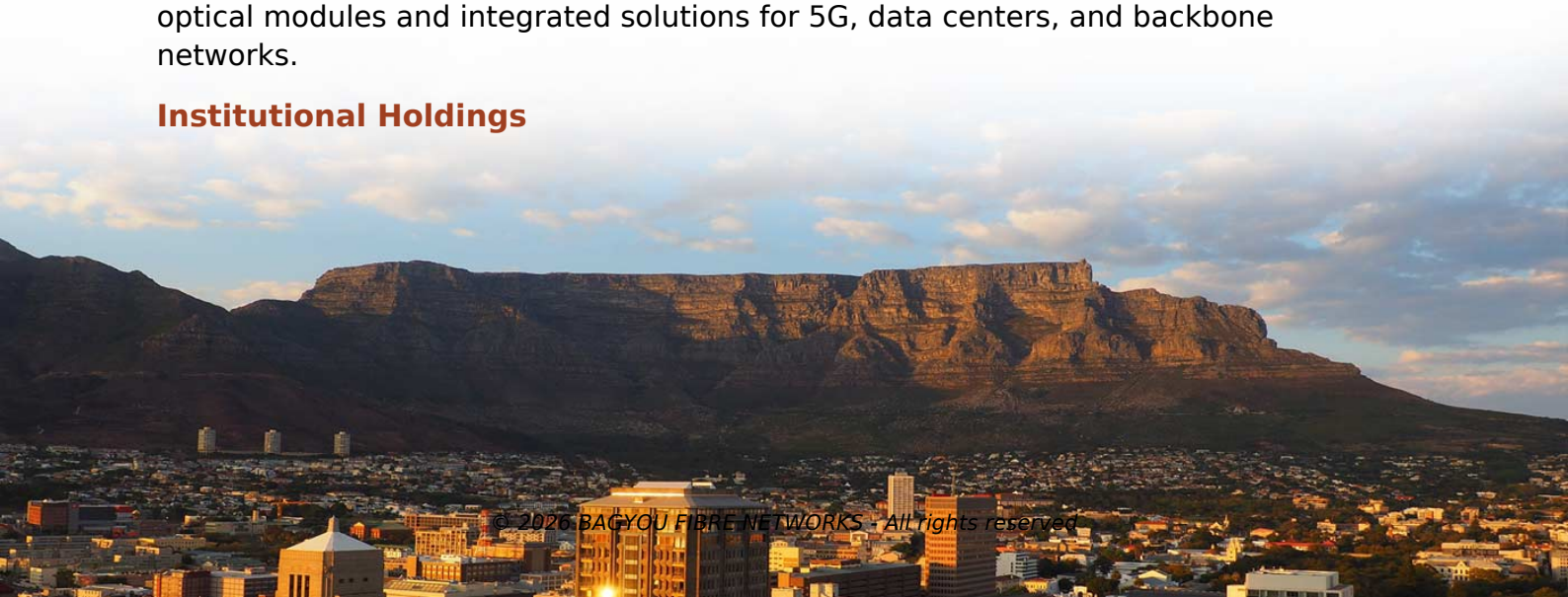
Institutional investors hold significant stakes in leading optical module companies like Lumentum, reflecting the sector's growth in data center, telecom, and AI infrastructure markets.

### Overview of Optical Module Companies

Optical modules, including transceivers, amplifiers, and splitters, are critical for high-speed data transmission in data centers, telecommunications networks, and enterprise infrastructure. Major companies in this sector include Lumentum, Accelink, Eoptolink, Innolight, and Huagong Tech. Lumentum, headquartered in San Jose, California, provides high-performance lasers, optical modules, and subsystems for cloud computing, AI, and telecom networks.

Accelink and Eoptolink are leading Chinese manufacturers, offering high-speed optical modules and integrated solutions for 5G, data centers, and backbone networks.

### Institutional Holdings



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Institutional holdings represent the aggregated ownership of a company's shares by mutual funds, pension funds, insurance companies, and other large investors. For publicly traded optical module companies like Lumentum Holdings Inc., institutional investors often hold a substantial portion of shares, reflecting confidence in the sector's growth and stability. These holdings can be accessed and analyzed through platforms like Nasdaq's Institutional Holdings page, which provides detailed ownership data, including the names of institutional investors, their share counts, and percentage ownership.

## Market Trends Influencing Institutional Investment

The optical module market is projected to grow from $14. 8 billion in 2025 to $39. 6 billion by 2034, driven by cloud computing, AI workloads, 5G backhaul, and hyperscale data center expansion.

This rapid growth attracts institutional investors seeking exposure to high-demand technology sectors. The transition from 100G to 400G and 800G optical modules and the adoption of silicon photonics are key technological drivers that enhance the long-term investment appeal.

## How to Access Institutional Holdings Data

To analyze institutional holdings in optical module companies: Visit the Nasdaq Institutional Holdings page. Search for the company of interest (e.g., Lumentum Holdings Inc.). Review the list of institutional investors, their share counts, and ownership percentages.

Use this data to assess market confidence, potential influence on corporate governance, and investment trends.

## Key Takeaways

Leading optical module companies attract significant institutional investment due to strong growth prospects in AI, cloud, and telecom infrastructure. Institutional holdings provide insight into market confidence and strategic positioning of these companies. Publicly available platforms like Nasdaq allow investors to track and analyze institutional ownership for informed decision-making.

By monitoring institutional holdings alongside market trends, investors can better understand the financial and strategic landscape of the optical module industry.

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## Article Content

Lumentum

Lumentum is a global leader in optical and photonic technologies that power the networks and infrastructure behind AI, cloud computing, and next-generation communications. Built on

Standing in the Light: A Comprehensive Guide to the Optical Module

"Standing in the Light: Understanding the Optical Module and CPO Industry Chain" This article analyzes the critical role of optical communication technology, specifically optical modules and

Chinese Optical Modules Own 7 of the Top 10 Seats. So Why Are

Behind them, Hisense Broadband holds a full chain from optical chips to terminal devices, HG Genuine has secured cost advantages through in-house EML chips and SiPh solutions, and TFC

Google''s TPU supply chain overview: Uncovering the "hidden ...

The following are key listed companies in each core area, with the newly added Tianfu Communication becoming a core player in the optical module segment. Relevant data primarily

Lumentum Holdings Inc, LU2:HAM profile

Lumentum Holdings Inc (LU2:HAM) company profile with history, revenue, mergers & acquisitions, peer analysis, institutional shareholders and more.

Why Is AAOI Falling? A Comprehensive Analysis of the Factors

On June 9, AAOI plunged over 17%. This article breaks down the core reasons behind the latest correction of this leading AI optical module company from four key perspectives: earnings

Which Companies Are Leading CPO Stocks? The Landscape of US

CPO concept stocks refer to listed companies positioned along the co-packaged optics technology supply chain, covering upstream optical chips (like Lumentum), midstream optical

Leading listed company in the optical module chip sector

Top listed companies in the optical module chip industry are those that possess core technologies and large-scale production capabilities in high-speed optical communication systems.

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10 companies in the optical transceiver industry chain 2024

To help you choose the best partner, this article will analyze and introduce 10 companies in the optical transceiver industry chain for you.

Optical Cable (OCC) Institutional Ownership 2026

How much institutional buying is happening at Optical Cable? Institutional investors have bought a total of 506,484 shares in the last 24 months. This purchase volume represents

Munich Re Boosts NXP Semiconductor Holdings During Q1 2026

Institutional Investment Trends and Market Confidence Munich Reinsurance Co. has demonstrated significant confidence in NXP Semiconductors by increasing its stake by 7.3% during

September 2024 Flashcards in Roshann KN''s MCQs: UPSC

They also have a wide range of synthesis methods and can be developed into disposable electrodes, optical kits, fiber optic sensors, colorimetric strips, etc. Applications To develop electrochemical and

Optical Module Investment Landscape 2026: Demand,

In late May 2026, AI optical modules are the most demand-certain link in the compute chain — and the easiest place to overpay. This piece first quantifies

From optical modules to chips -

BEIJING -- With the global push for AI computing power unleashing an unprecedented wave of infrastructure buildout, China-made optical modules that shuttle data and the chips that

Source Photonics to Expand Optical Chip and Module Production

On June 16, Dongshan Precision (DSBJ) announced that its wholly owned subsidiary, Source Photonics Holdings (Cayman) Limited, and its affiliated entities will invest in optical chip and

China''s Dominance in AI Optical Chips and Modules

China secures control over AI data arteries via optical modules. Explore the geopolitical impact on the global semiconductor market. Read the full analysis.

17 Chinese Funds Double Returns via AI & Optical Module Stocks

Summarize: 17 active mutual funds in China achieved returns over 100% this year through heavily concentrated holdings in AI computing power and optical module stocks.

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Deep Dive: Optical Module Market

Powering next-gen connectivity: How optical modules enable fast, reliable data transfer, and What are the opportunities for investors?

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