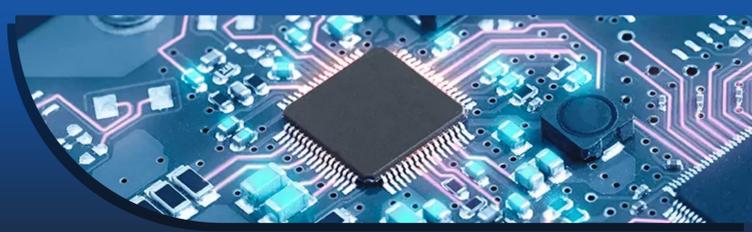


# Behind-the-Scenes Star: How Micron Technology Is Surging Past Nvidia in Revenue Growth and Stock Price



Written by [Michael Fisher](#), | Updated: February 27, 2026

The semiconductor sector has experienced impressive growth over the past year, driven by surging demand for AI infrastructure and data-center components. **With NVIDIA's Q4 FY2026 earnings now released**, reporting another quarter of exceptional growth, including a sharp jump in data-center revenue and continued margin expansion, investors now have a clear benchmark for what 'strong performance' looks like at the top of the AI hardware stack.

Against that backdrop, the team at [Tradingpedia](#) looks at stock performance and quarterly revenue acceleration for six major semiconductor companies: Advanced Micro Devices (AMD), Broadcom, Micron Technology, Intel, NVIDIA, and Taiwan Semiconductor Manufacturing Company (TSMC).

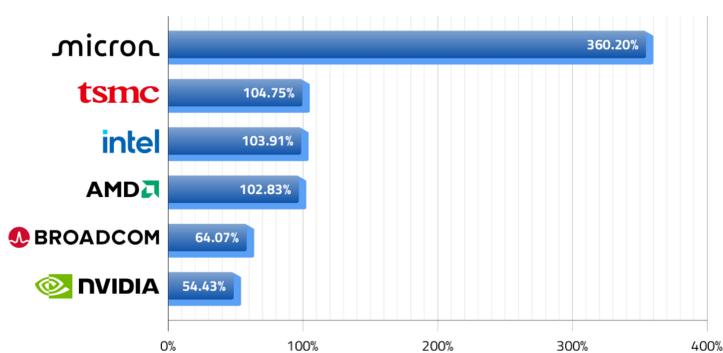
Our findings show Micron Technology has seen the highest 12-month stock return growth among major semiconductor companies, including Nvidia and TSMC, with its stock surging **360% over the past year**, climbing from roughly \$91 to \$429 as of February 25, 2026. The company also led in **quarter-on-quarter revenue growth**, reflecting surging demand for high-bandwidth computer memory. Tight supply and rising prices have boosted margins, positioning Micron as a critical supplier in the rapidly expanding AI infrastructure market.

## Micron Outpaces the Competition in 1-Year Stock Returns

Over the past 12 months, U.S. computer memory and data storage company **Micron Technology delivered the strongest stock performance in the sector**, its price climbing from roughly \$91 to \$429 as of February 25, 2026, representing a +360% increase. This surge has been driven in part by a **tightening supply of HBM3e and HBM4 memory chips**, where strong AI-driven demand has allowed Micron to raise prices and expand profit margins, positioning the company as a critical supplier in the rapidly growing AI infrastructure market.

## One-Year Stock Returns Across Major Semiconductor Companies

Comparison of 12-month share price performance for leading chipmakers



Data Sources: Yahoo Finance, official company financial reports

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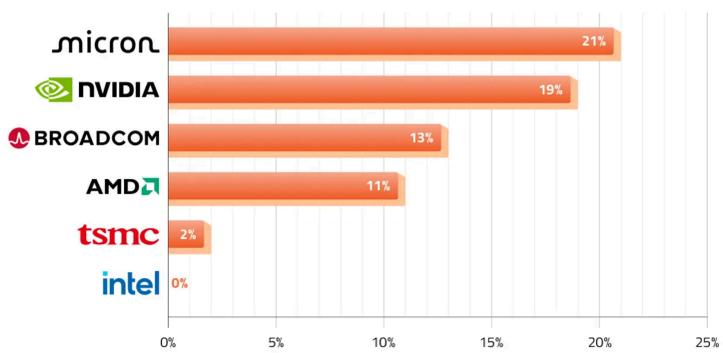


By comparison, **NVIDIA posted a +54% 1-year return**, despite maintaining the sector's largest market capitalisation of \$4.76 trillion. Much of NVIDIA's expected growth from hyperscaler and enterprise AI adoption had already been priced in, limiting the scope of further expansion. Other large-cap players followed intermediate paths: **Broadcom rose +64%**, while **AMD, TSMC, and Intel posted roughly +100% gains**. This pattern illustrates a broader market rotation, with investors favoring upstream infrastructure suppliers, memory and foundry providers, over headline AI compute vendors.

## Micron Outpaces Rivals in AI-Driven Quarterly Revenue Surge

Recent quarterly results reveal clear differences in growth momentum across the semiconductor sector. **Micron Technology posted the highest QoQ revenue growth at +21%**, increasing revenues from \$11.3 billion to \$13.6 billion according to the company's Q1 financial report (released December 2025), driven by an **ever-growing demand among AI companies for computer memory and storage space**. The company has also **stopped selling consumer RAM to focus exclusively on AI and data center clients**, further concentrating its exposure to the fastest-growing segment. NVIDIA followed with +19%, rising from \$57.01 billion to \$68.1 billion, reflecting ongoing GPU adoption by hyperscalers and enterprise clients.

## Revenue Growth from Q3 2025 to Q4 2025\* of Leading Semiconductor Firms



\*Sequential revenue growth Q3/Q4 2025

Micron's results are for Q1 FY 2026, reported December 17, 2025

Data Sources: Yahoo Finance, official company financial reports

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Other companies showed more moderate sequential gains: **Broadcom +13%** to \$18.02 billion, **AMD +11%** to \$10.27 billion, while **TSMC and Intel** posted only +2% and flat growth at \$33.73 billion and \$13.7 billion, respectively.

Year-on-year growth highlights longer-term scale expansion. **NVIDIA is firmly in the lead** with a +73% year on year revenue growth, up from \$39.3 billion to \$68.1 billion. **Micron ranks second**, with its revenue expanding by 57% year on year, from \$8.7 billion to \$13.6 billion, demonstrating the rising market value of memory infrastructure suppliers. **AMD, Broadcom, and TSMC all achieved solid annual growth** between 25-34%, while **Intel's -4% YoY decline** illustrates ongoing challenges in legacy CPU markets amid the AI-focused industry shift. Overall, momentum is strongest among firms supplying AI infrastructure, consistent with the rotation observed in stock performance.

## Methodology

This report combines official quarterly and annual financial filings with publicly available market data. Revenue figures for Q3 and Q4 (Q4 2025-Q1 2026 for Micron Technology) 2025 were collected from company earnings reports, and quarter-on-quarter and year-on-year growth rates were calculated directly from these reported values. Stock price performance metrics, including YTD, 1-year, and 5-year returns, were sourced from [Yahoo Finance](#) and cross-checked with [Investing.com](#) to ensure accuracy. This approach provides a consistent basis for comparing both financial performance and market returns across the semiconductor sector.

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