

Tom Hulick on CNBC Power Lunch

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Tom Hulick, CEO of Strategy Asset Managers, joined CNBC Power Lunch to discuss the accelerating role of artificial intelligence and automation in driving productivity, margins, and long-term economic growth. He discussed SAM's conviction in companies positioned to benefit from the deployment of AI and automation across the economy.

During the conversation, Tom discussed Intuitive Surgical, which he described as a high-conviction position, highlighting how advances in automation and AI may support productivity and operational efficiency despite recent stock volatility. He also shared a constructive outlook on Palantir, noting the company's transition from AI experimentation toward deployment within operational workflows, particularly in government defense and enterprise applications.

The discussion also referenced technology exposure within SAM portfolios, including companies such as Broadcom, Microsoft, and Alphabet. The segment also briefly referenced developments in the restaurant sector, including the recent performance of Mediterranean chain Cava.