

An ad war brewing in the world of AI

Claude's Super Bowl debut gently mocks OpenAI, highlighting a growing divide over AI monetisation

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New Delhi, 5 February

A new age may have dawned with the advent of artificial intelligence (AI) but some things remain the same — the familiar corporate instinct to dominate markets, and outspend and run down rivals, for instance. That is precisely what Sam Altman's OpenAI (ChatGPT) and Anthropic's Claude are currently engaged in.

As the two companies race to win more users and credibility, they have turned to one of the oldest playbooks in corporate warfare: Tongue-in-cheek advertising that takes pointed digs at rivals.

The pattern is familiar. Recall the fights between Coca-Cola and Pepsi, Samsung and Apple, BlackBerry and Nokia, among countless other examples. The latest round of brand distilling is playing out not over fizzy drinks or smartphones, but over how AI should be funded, marketed and trusted.

Anthropic's dig

Anthropic has released four 61-second commercials on YouTube. One features a man in a park asking another man for fitness advice. The response begins in the stiff, robotic tone resembling an AI chatbot explanation ("Perfect, let me personalise this for you"), before abruptly turning into a sales pitch for shoe insoles.

The screen then cuts to a message: "Ads are coming to AI. But not to Claude."

The ad does not mention OpenAI or ChatGPT by name, but the reference is widely understood. Anthropic has also released three other ads on YouTube using similar scenarios, where AI-style conversations suddenly veer into product promotions.

The other three ads present different situations — of a student and professor, a son talking to a therapist, and a woman asking for a business idea. Each has the same message: Ads are coming to AI but Claude is not going to use ads.

The campaign follows OpenAI's announcement last month that it would begin testing ads within ChatGPT for free users and subscribers on its lower-priced GPT-4o tier in the US.

To be sure, the 'exchange' has been a bit one-sided so far. According to OpenAI, its ads will be clearly labelled, appear at the bottom of responses, and will not influence how ChatGPT answers questions. The company also said ads will not appear for sensitive topics such as politics and mental health, and that users can opt out of personalisation, and minors will not be shown ads.

However, Anthropic, in a blog post released along with the campaign, said advertising, once introduced, only tends to expand over time and can shape product decisions and engagement goals.

"The company said it wants Claude to remain 'unambiguously' aligned to users' interests rather than external commercial incentives.

That stance, however, raises questions about whether an ad-free model can scale at the pace demanded by the AI race.

"While Anthropic's ad-free model emphasises trust and user-focus, its long-term viability at scale remains uncertain," said Salman Waris, founder and managing partner at Tech-Legis, a law firm.

"Anthropic has acknowledged that it loses money on every free chat with-out an advertising revenue stream. Its enterprise and subscription revenues may not support global expansion at the same pace as OpenAI."

Waris added that the company's position was "a bold bet on premium user-experience over mass-market monetisation," but said there were questions on whether such a model could survive price-sensitive markets — something Anthropic would need as it prepares for a potential IPO in 2026.

Money at stake

Advertising has become increasingly important as AI companies ramp up spending. OpenAI has signed infrastructure deals worth more than \$8.4 trillion in 2025, making new revenue streams a priority, according to a report in *The Wall Street Journal*. Digital advertising has long been the main source of income for companies such as Google and



Meta, and OpenAI has indicated ads could help support its scale.

AI companies are already spending heavily to market themselves. Industry estimates show that tech companies including Anthropic, OpenAI, Google, Microsoft and Perplexity spent \$333.6 million on US broadcast TV ads for AI products last year, a 43 per cent rise on-year. Digital ad spending more than tripled to \$426 million, WSJ reported.

At the time of the Super Bowl — the annual American football league final — alone costs more than \$8 million for a 30-second slot, excluding production costs.

OpenAI CEO Sam Altman retorted that he laughed at the ads, while questioning Anthropic's "clearly dishonest portrayal" of what OpenAI plans to do.

On Wednesday (February 4), Altman posted on X: "Our most important principle for ads says that we won't do exactly this, we would obviously never run ads in the way Anthropic depicts them," adding, "We are not stupid and we know our users would reject that."

This year's Super Bowl, which is scheduled to begin from February 8, will feature advertisements from both Anthropic and OpenAI, marking a moment when AI companies are no longer just selling products to businesses and developers, but are directly courting mass-market users.

The Super Bowl draws massive viewership, often over 120 million in the US, making it one of the largest live TV audiences, which creates prime advertising real estate despite the high costs.

For Anthropic, the Super Bowl debut is also a strategic statement. The move echoes classic marketing battles seen earlier in industries such as soft drinks, smartphones and telecom, where rivals publicly take swipes at each other through high-profile ad campaigns.

"Given the amount of capital and entrepreneurial energy being directed at the AI sector, such clashes of ideas are inevitable," said Shalish Dhuri, chief executive of Decimtal Point Analytics, an AI-powered data analysis firm. He said the industry is likely to settle around three broad business models: Ad-free, open-weights (which gives restricted access to business systems) and ad-based, with each model taking digs at the others to capture mindshare in the early stages of the market.

"This kind of brand-to-brand sparring is becoming inevitable," Waris said. "AI companies are now behaving like consumer brands, competing for trust, mindshare and default status."

How Claude stacks up

Anthropic was founded in 2021 by former OpenAI researchers, including chief executive Dario Amodei. It is best known for its Claude family of AI models and coding-focused tool Claude Code, which has seen rapid adoption in recent months. Claude was launched in March 2023.

The company is significantly smaller than OpenAI, which says it has more than 800 million weekly active users. However, Anthropic has gained traction with enterprise customers, partly due to Claude's performance in coding-related tasks.

Since September, Anthropic has been advertising under the slogan "Keep Thinking", positioning Claude as a partner for complex problem-solving rather than a replacement for human thinking.

As AI tools move closer to everyday consumer use, the questions around monetisation, advertising and user alignment are now turning to how companies will differentiate themselves in the future — and, crucially, how they'll sell that difference to the public.

Mover and shaker

Anthropic has introduced 11 plug-ins that allow Claude Code, its generative AI workspace, to automate work across legal, sales, marketing and data analysis, including tasks traditionally handled by platforms like Salesforce or ServiceNow, causing a sharp fall in IT stocks on February 3. Here's a brief explainer:

How Cowork supports industries

It supports administrative, research and analysis, sales and legal and compliance functions. For administrative jobs, it generates a daily briefing that pulls from Slack, Notion and GitHub to bring up priorities by scanning each platform separately. For research and analysis, it researches, calculates, and provides PowerPoint presentations or Excel workbooks. When it comes to sales, Cowork synthesizes feedback from call transcripts, Slack, CRM notes, and linear issues to identify cross-platform patterns and generate prioritized product ideas. And for legal purposes, it turns a folder of lawsuit documents into a chronologically organized exhibit set with descriptive titles and strategic importance assessment.

How it helps users

Anthropic already has Claude Code, a year-old coding agent. Cowork has agentic capabilities wrapped in a way that makes them accessible to non-developer audience like analysts, legal teams, sales and marketers — people who don't write code but still perform fairly complex workflows every day using a mix of traditional SaaS tools and a lot of manual work.

What's behind the sudden frenzy

Anthropic's innovation means that not only software coding but also non-technical regular tasks can now be automated. This has created a great deal of excitement among users but spooked tech and software as a service (SaaS) stock investors. There are concerns on whether this means a downturn in the business of software and IT services companies as AI upends the way people work.

How industries and executives reacted

Nasscom: Concerns that such tools will significantly disrupt or eliminate the technology services sector where India has a strong global presence are misplaced. Indian technology services companies work closely with global enterprises that operate complex technology environments, with interconnected systems and fragmented data. Aditya Agarwal, venture partner, South Park Commons: I spent a lot of time over the weekend writing code with Claude. And it was very clear that we will never ever write code by hand again. It doesn't make any sense to do so. Jensen Huang, CEO, Nvidia: There's this notion that the tool in the software industry is in decline, and will be replaced by AI... It is the most illogical thing in the world, and time will prove itself. Ravi Kumar, CEO, Cognizant: A tool or a technology would be plugged into an enterprise landscape, and magically, there will be output coming out of it. If that's the case, why hasn't that value drifted into enterprises over the last three years? It is very complex, you have to integrate workflows, business flows, with AI-led action-oriented technology with human labour.

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PENINSULA LAND LIMITED
CIN: L17120MH1871PLC000005

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Phone: +91 22 8622 9300 Email: investor@peninsula.co.in Website: www.peninsula.co.in

STATEMENT OF UNAUDITED FINANCIAL RESULTS (STANDALONE AND CONSOLIDATED) FOR THE QUARTER AND NINE MONTH ENDED DECEMBER 31, 2025

In compliance with Regulation 33 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 ("SEBI Listing Regulations"), the Board of Directors of the Peninsula Land Limited ("Company") at its meeting held on Thursday, February 05, 2026 approved the unaudited financial results (standalone and consolidated) for the quarter and Nine-Month ended December 31, 2025 ("results").

The results along with limited review report (Standalone and Consolidated) by S R B C & CO LLP, Statutory Auditors of the Company are available on the website of the Company at <https://www.peninsula.co.in> and on website of Stock Exchanges at www.bseindia.com and www.nseindia.com.

In compliance with regulation 47 of SEBI Listing Regulations, we hereby notify that the same can also be accessed by scanning the following Quick Response (QR) code.



For and on behalf of the Board of Directors of Peninsula Land Limited
Sd/-
Executive vice-Chairman and managing Director
DIN:00044983

Date: february 05, 2026
Place: Mumbai

IL&FS Engineering Services
IL&FS ENGINEERING AND CONSTRUCTION COMPANY LIMITED

CIN: L45201TG1988PLC008624

Regd. Office: D.No.8-2/120/113, B-Block, 1st Floor, Sanali Info Park, Road No. 2, Banjara Hills, Hyderabad - 500033
Ph: 040-40409333; Fax: 040-40409444; Email: cs@ilfseng.com; Web: www.ilfseng.com

UNAUDITED FINANCIAL RESULTS FOR THE QUARTER AND NINE MONTHS ENDED DECEMBER 31, 2025

Pursuant to Regulation 47 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

The Unaudited Standalone and Consolidated Financial Results for the Quarter and Nine months ended 31st December, 2025 ("Financial Results") have been reviewed by the Audit Committee and approved by the Board of Directors of the Company at their respective meetings held on Thursday, February 05, 2026.

The said Financial Results along with the Auditors Report have been posted on the Company's webpage at <https://www.ilfseng.com/News/CommExchange/2025/26/Results-Dec25.pdf> and on the websites of the Stock Exchanges i.e., www.bseindia.com and www.nseindia.com and can be accessed by scanning the QR Code provided below:



For and on behalf of Board of Directors
IL&FS Engineering and Construction Company Limited
RAJESH HALA KHAN
Chief Executive Officer

Date: 05.02.2026

ODISHA GRAMEEN BANK
INFORMATION TECHNOLOGY DEPARTMENT, HEAD OFFICE,
GANDAMUNDA, PO: KHANDELGI, BHUBANESWAR-751033 (ODISHA)

BH Number GEM2026/07/194155& BH Number GEM2026/06/192292 Date: 05.02.2026

Odisha Grambank invites application for: (1) Selection of service provider for Managed Network Operation Center. (2) Selection of service provider for Facility Management Services for Branch Network Maintenance and supply of additional materials, services, for details, and application format please visit Bank's website: www.odishabank.bank.in

GENERAL MANAGER

MAHANADI COALFIELDS LIMITED
(A Subsidiary of Coal India Limited)

JAGRUTI VIHAR, BURLA-769023, DIST-SAMBALPUR, ODISHA
Pin: 769023 (OR) Tel: 0672-250261 to 480 Website: www.mcl.co.in

Ref.No. MCL/SB/PE/2026/Advisor(M&S)/5995, Date: 02.02.2026

NOTIFICATION FOR ENGAGEMENT OF FULL-TIME ADVISOR(M&S) IN MCL ON CONTRACT BASIS

Mahanadi Coalfields Limited (A Subsidiary of Coal India Limited, a Govt. of India Enterprise) invites applications from the retired E7/E8 grade executives of Marketing & Sales (M&S) of Coal India Limited / Subsidiary Companies or equivalent from PSUs/Autonomous organisation of Central / State Govt. for one post of full-time Advisor(M&S) on contractual basis. The applicant should possess (03) years of working experience at Corporate level, with expertise in commercial matters and customer relationship management. Experience in the Coal/Mining sector is a desirable experience. The detailed Notification including Job Description required to be performed and application format is available at www.mahanadi.coalindia.in website under the caption MCL - Career - Career at MCL - Recruitment and CIL website www.cilindia.in. The last date of receipt of Application Form is 16.02.2026 upto 5.00 PM. Application format can be downloaded from the website. Duly filled in application along with attested copies of all relevant documents are to be sent by the applicant to the General Manager (HR/EE), Mahanadi Coalfields Ltd., At/PO- Jagruti Vihar, Burla, Dist- Sambalpur-769020, Odisha in the email ID: gm-vee.mcl@coalindia.in

Sd/-
General Manager (HR-EE)
MCL, HQ, Jagruti Vihar,
Burla, Sambalpur.


R-9285

ALLIED DIGITAL SERVICES LIMITED
Regd. Office: 808, 8th Floor, Plot No. 221/222, Malabar Centre, Vidhan Bhawan Marg, Nariman Point, Mumbai - 400 021;
CIN: L17200MH1995PLC005488 Website: www.allieddigital.net
Tel: 022-68816402; Email: cs@allieddigital.net / investor@allieddigital.net

EXTRACT OF THE UNAUDITED STANDALONE AND CONSOLIDATED FINANCIAL RESULTS FOR THE QUARTER AND NINE MONTHS ENDED DECEMBER 31, 2025 (All in Lakhs)

| Sl. No. | Particulars | Quarter Ended | | | | | | Nine Months ended | | | | | |
|---------|--|---------------|--------------|------------|--------------|------------|--------------|-------------------|--------------|------------|--------------|------------|--------|
| | | 31.12.2025 | | 30.09.2025 | | 31.12.2024 | | 30.09.2025 | | 31.12.2024 | | 31.03.2025 | |
| | | Standalone | Consolidated | Standalone | Consolidated | Standalone | Consolidated | Standalone | Consolidated | Standalone | Consolidated | | |
| 1 | Total income from operations (net) | 9,478 | 10,658 | 10,619 | 24,742 | 23,370 | 22,057 | 29,082 | 26,621 | 70,014 | 60,272 | 36,615 | 80,707 |
| 2 | Net Profit / (Loss) for the period (before Tax, Exceptional and/or Extraordinary items) | 1,032 | 873 | 621 | 2,274 | 2,056 | 2,007 | 2,455 | 1,887 | 5,747 | 4,979 | 2,972 | 6,076 |
| 3 | Net Profit / (Loss) for the period before tax (after Exceptional and/or Extraordinary items) | 902 | 873 | 621 | 2,144 | 2,056 | 2,007 | 2,325 | 1,887 | 5,617 | 4,979 | 2,972 | 5,946 |
| 4 | Net Profit / (Loss) for the period after tax (after Exceptional and/or Extraordinary items) | 388 | 621 | 594 | 1,391 | 1,541 | 1,771 | 1,810 | 1,507 | 4,376 | 3,972 | 1,073 | 3,080 |
| 5 | Total Comprehensive Income for the period (Comprising Profit / (Loss) for the period (after tax) and Other Comprehensive Income (after tax)) | 472 | 621 | 594 | 1,398 | 1,627 | 1,806 | 1,894 | 1,438 | 4,470 | 3,963 | 964 | 2,971 |
| 6 | Paid up equity share capital (Face Value of Rs. 5 each, fully paid up) | 2,826 | 2,821 | 2,811 | 2,826 | 2,821 | 2,811 | 2,826 | 2,811 | 2,826 | 2,811 | 2,819 | 2,819 |
| 7 | Reserves (excluding Revaluation Reserve) as shown in the Audited Balance Sheet of the previous year | | | | | | | | | | | 45,324 | 57,357 |
| 8 | Earnings Per Share (of Rs. 5/- each) (for continuing and discontinued operations): | | | | | | | | | | | | |
| | a. Basic | 0.69 | 1.10 | 1.06 | 2.20 | 2.58 | 2.97 | 3.21 | 2.71 | 7.11 | 6.35 | 1.92 | 4.98 |
| | b. Diluted | 0.68 | 1.08 | 1.04 | 2.17 | 2.54 | 2.92 | 3.17 | 2.66 | 7.03 | 6.24 | 1.89 | 4.91 |

Notes:
1. The above results, has been recommended by the Audit Committee and approved by the Board of Directors at its meeting held on February 04, 2026 as per Regulation 33 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015.
2. The above is an extract of the detailed format of Quarterly Financial Results filed with the Stock Exchange under Reg. 33 of SEBI (Listing and Other Disclosure Requirements) Regulation, 2015. The complete format of the said Results are available on the website of Stock Exchange www.bseindia.com and www.nseindia.com and on the company's website i.e., www.allieddigital.net



For and on behalf of the Board of Directors of Allied Digital Services Limited
Sd/-
Nehal Shah
DIN:92768491
Whole-Time Director

Place: Mumbai
Date: February 04, 2026