

Newsletter | Markets Daily

The AI Scare Trade Has Now Come for Trucking Stocks

The selloff rolls on as investors take fright at the disruptive technology.

By Phil Serafino and Charles Riley

February 13, 2026 at 5:20 AM CST

...

From karaoke to logistics

This is how crazy the AI disruption trade has gotten: A company with a \$4.8 million market value, which a couple of years ago was in the business of importing karaoke machines from China, announced that its AI-driven platform is helping clients manage more freight shipments with fewer people.

...

Trucking and logistics stocks immediately tanked. The Russell 3000 Trucking Index dropped 6.6%, with CH Robinson falling 15% and Landstar System sinking 16%.