

# US Stock Express

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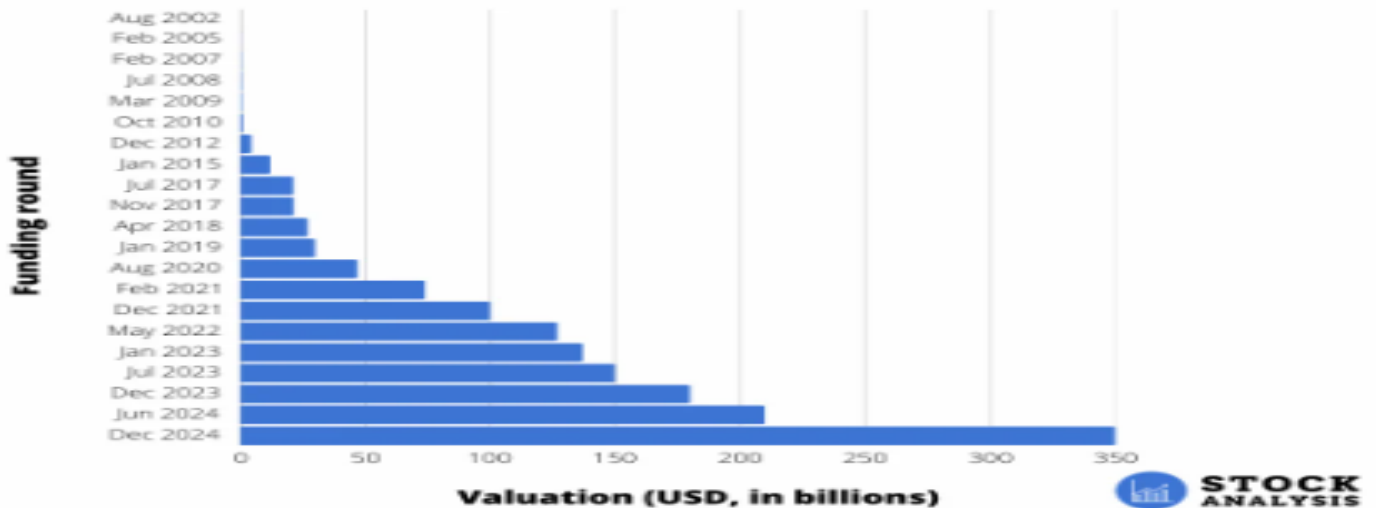
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Because of currency war led by tariff war, EUR to USD will soon fall to parity, that is 1:1.

## How much is SpaceX worth?



A lot of people wish to invest in SpaceX, but IPO not yet come.



## 重要數據      Important indicators

Date 日期	Day 星期	HK Time 時間	Star 重要性	Place 地區	Indicator	數據	Previous 前值	Expected 預期
4/2	(二)Tu	21:55	☆☆☆	US 美國	Red Book	紅皮書	4.9%	4.9%
4/2	(二)Tu	23:00	☆☆☆	US 美國	Durable Goods	耐用品訂單	+0.3%	+0.7%
4/2	(二)Tu	23:00	☆☆☆	US 美國	Durable Goods(ex Def)	耐用品訂單(扣國防)	0.3%	0.3%
4/2	(二)Tu	23:00	☆☆☆	US 美國	Factory Orders	工廠訂單	-0.4%	-0.4%
4/2	(二)Tu	23:00	☆☆☆	US 美國	JOLTS	職位空缺數	8.098M	8.102M
4/2	(二)Tu	23:10	☆☆☆	US 美國	IBD/TPP Index	IBD/TPP 經濟指數	51.9	57.6

## North East West South is **NEWS**

Apple CEO Tim Cook responded to the impact of the DeepSeek AI model, pointing out that it brings "efficiency to innovation," while also revealing Apple's development strategy and future prospects in the field of AI.

The Israeli Prime Minister's Office announced today that Prime Minister Netanyahu will begin negotiations in Washington on the second phase of the Israeli-Pakistani ceasefire agreement.

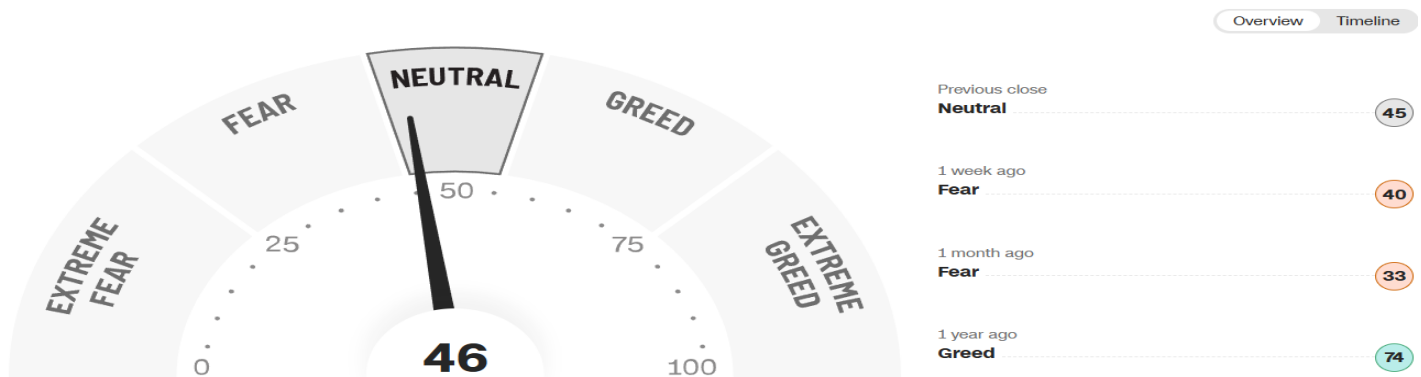
The latest data from the California Department of Motor Vehicles (DMV) shows that the scale of testing of self-driving cars in California has been significantly reduced. The total test mileage in the state in 2024 was only 4.5 million miles, a 50% decrease from 2023, of which driverless tests fell sharply by 83%. Waymo will shift its focus to commercial operations, while Cruise will be delisted by its parent company General Motors due to safety issues. The suspension will reduce market competitiveness. Currently, there are still 31 companies in California that hold such testing permits, but in 2024 only 11 companies will actually conduct road testing.

U.S. President Donald Trump on Monday accused South Africa of "confiscating" land and "treating certain classes of people very badly," and announced he would cut off all future funding to South Africa while an investigation is underway.

Wall Street banks including Goldman Sachs and JPMorgan Chase & Co believe it is still profitable to buy the dollar even after it surged on U.S. President Donald Trump's latest tariff move. Goldman Sachs expects the dollar to break parity against the euro. JPMorgan said it expects the dollar to rise to around 1.50 Canadian dollars for the first time in decades.

## Fear & Greed Index

What emotion is driving the market now?  
[Learn more about the index](#)



Last updated Feb 3 at 7:42:01 AM ET



World Observation

DAY 1077

Russia / Ukraine Conflict

## Donald Trump 2.0

(10) Personal Assistant to President

The incumbent president Trump is bringing a lot of worries in economy for it may generate a recession. However, out of the normal post vice-president, he added an un-named post for Elon Musk who power is above the vice-president and never had such a post in White House before. You can name him as special assistant or personal assistant or whatsoever. Anyway, he is bringing about good news.

Tesla's Full Self-Driving (FSD) technology is continuously evolving. According to recent updates, Tesla plans to launch **unsupervised full self-driving** as a paid service in **Austin, Texas, in June 2025**. Elon Musk also mentioned that they aim to roll out this service in California later this year and eventually in other regions of the US.

When US ignites the tariff war, a lot of people would at once think about AAPL and TSLA if China wants to have retaliation. That is a lot of limitation may levy on these 2 large enterprise. The production line of Apple is gradually moving out of China to ASEAN countries, practically the i-phone models in spite of yearly renewed, now not as fantastic as one or two decades ago. However Full Self Driving of Tesla is developing into level 14 this year and level 15 next year which will have more safety than human driving. And for mid-level white collars, after driving their car to office, can at once used as Uber taxi to earn money and will go back before the host clock off. So it's quite attractive to them.

Even some people expect Trump might bring about a recession in mid-2025, but it is also the time of launching out of Full Self Driving. At least Trump and those red state will support them. Now, one of the major setbacks are from labor unions for they afraid of pushing high unemployment rate. So let's wide open our eyes and see what would happen in June. Besides Tesla, Elon Musk also has his SpaceX which will develop his project to Landing of the Mar. His reusable rockets even will carry spacecraft for NASA. All these can fight against recession.

Last 199.800 Change -9.520 (4.548%)

Updated: 2025/02/03 17:03 EST

Taiwan Semiconductor Manufacturing Company Ltd. (TSM.US)

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6 months (daily)  
SMA(10):210.271 SMA(20):209.707 SMA(50):201.505 SMA(100):193.887 SMA(250):169.302  
www.aastocks.com

03/02/2025 O:199.63 H:204.99 L:197.98 C:199.



Last 116.660 Change -3.410 (2.840%)

Updated: 2025/02/03 17:03 EST

NVIDIA Corporation (NVDA.US)

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6 months (daily)  
SMA(10):131.023 SMA(20):134.64 SMA(50):136.815 SMA(100):134.228 SMA(250):114.77  
www.aastocks.com

03/02/2025 O:114.75 H:118.57 L:113.01 C:116.66





## Market Observation

EUR/USD  
1.03536

### Tariff War effect on TSLA , NVDA, TSM

The development of TSLA in China is facing some setbacks. Elon Musk tried his best and at length persuade China that he has the right to collect the road data and driving habit of China for research and development of Full Self Driving in China. But because of the Trump era 2.0, there are some setbacks. Those data cannot send to US for analysis, and US does not allow advanced chips ship to China for usage. That is why the recent rebound, TSLA only had few advance and now even on the bottom of a W-shape. But if Full Self Driving launches out in June 2025, it is a tremendous good news.

For NVDA, Trump requested them to form a team of 1,000 investigators to chase back in the past 2 years, how those chips are send to China through Singapore and Vietnam one by one. So in the future, when chips are sent to sanction places, they can stop their usage at once. Just as the sharing bikes now, when the drive off to long distance, it will be lock up at once.

If US levy tariff in Taiwan, TSM may also have a drop, once it popped up above the reverse Head & Shoulders and now goes back to middle. NVDA and TSM will be gloomy in the next few months. Investors can buy at low when they drop. Or people wish to buy SpaceX, but the IPO has not yet come. So people can invest in ARK of Cathy Wood which holds 15.79% of Space X, or SOFI do not like to disclose the percentage, some said it 12% and also DXYZ, some they only has 0.01%. GOOG has 1% and Bank of America 0.8%.