

US Stock Express

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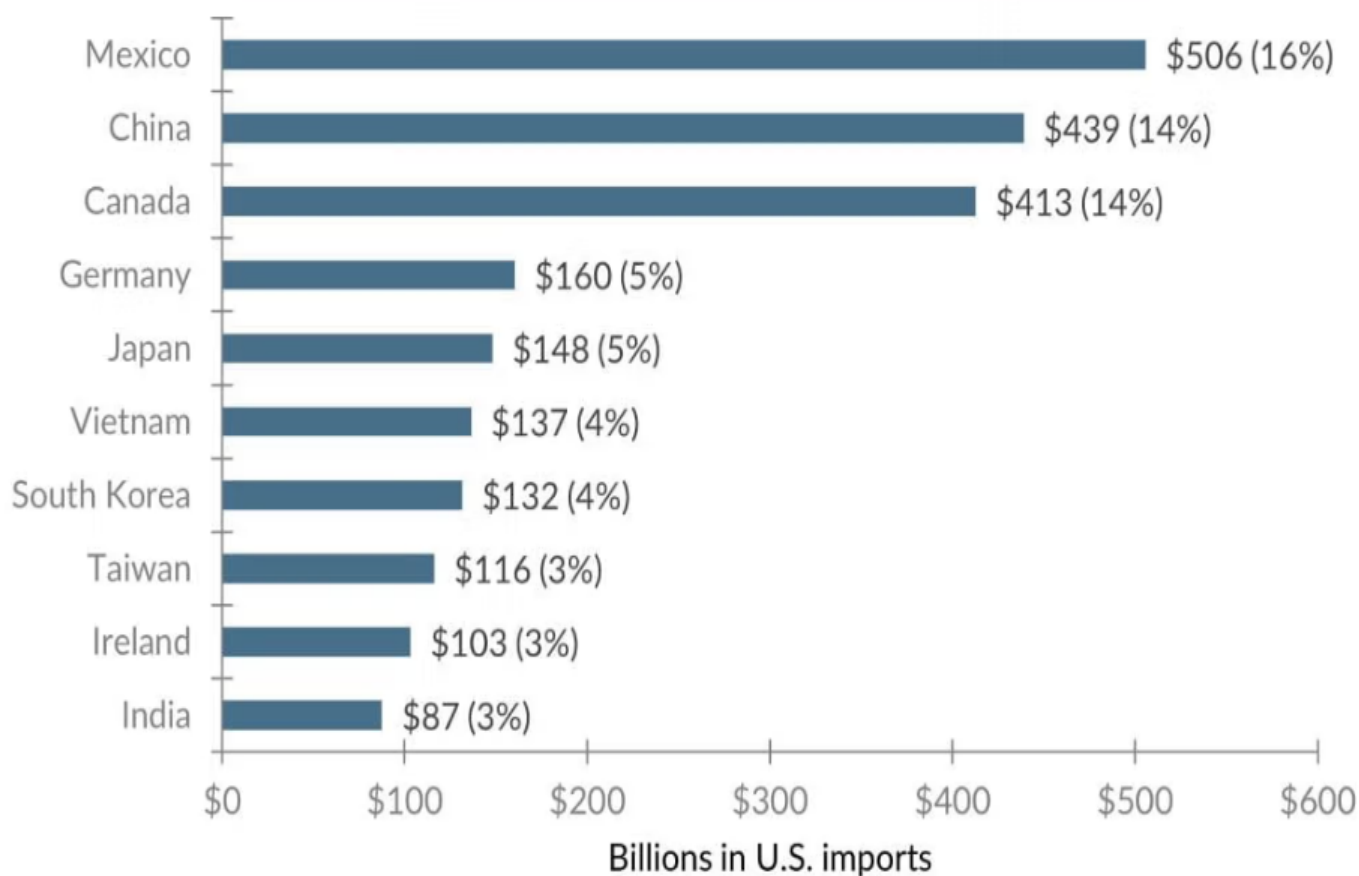
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Top U.S. import relationships



Source: PMFA, International Trade Administration. Data represents value in U.S. imports by country and representative percentage as total U.S. imports through calendar year 2023.

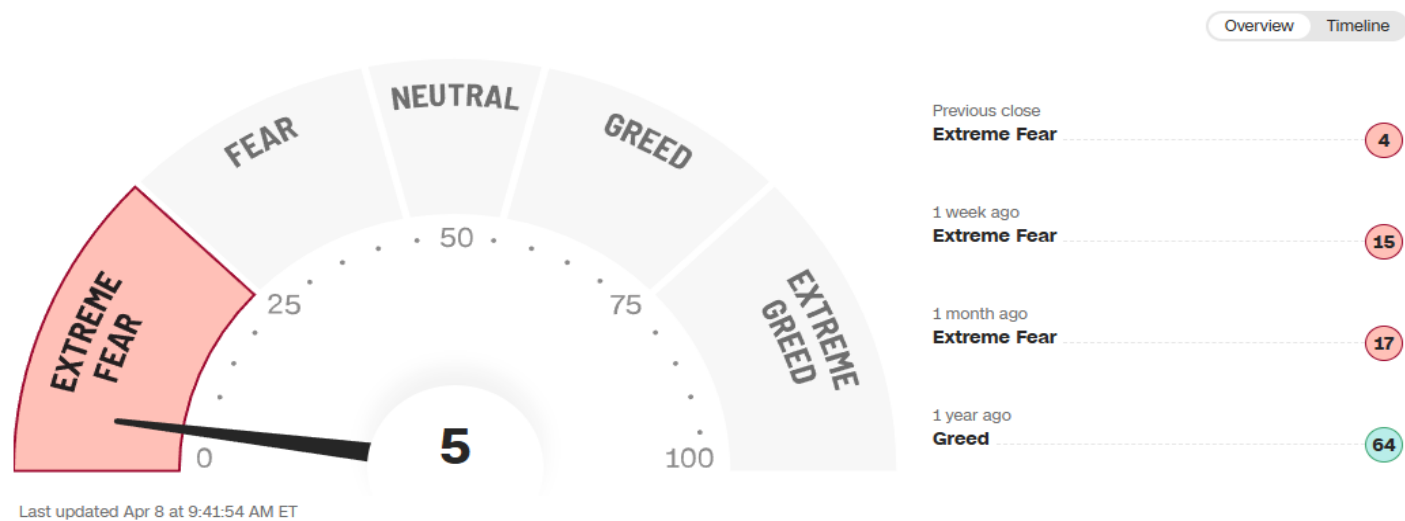
Over 40% of U.S. imports originate from three countries; those same countries that have been in the crosshairs of recent tariff proposals and implementations.

<https://www.plantemoran.com/explore-our-thinking/insight/2025/03/tracing-the-origins-of-us-imports>

*Risk disclosure: Price can go up and down at any moment, trade and bear the risk according to your own capital:
All suggestions are for reference only, final decision still lies upon investors.*

Fear & Greed Index

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



North East West South is NEWS

U.S. President Trump posted a message on his "Truth Social" account, criticizing China as the "biggest abuser" of tariffs and saying Beijing ignored his warnings to "not retaliate" with reciprocal tariffs.

French President Emmanuel Macron called on Monday for "strong action" if Russia continued to "reject peace".

Allianz Trade expects global economic growth to drop to 1.9%, the lowest since 2008, with the United States entering a recession in the third quarter, mainly due to a decline in consumer and investment spending, and full-year economic growth of 0.8%.

The U.S. Supreme Court on Thursday lifted a lower court order that blocked the deportation of undocumented immigrants under a wartime law, marking a major victory for President Donald Trump's administration.

NATO Secretary General Mark Rutte said today that China's armed forces expansion is "astonishing." He starts his visit to Japan today and during his meeting with the Japanese Defense Minister, he called on both sides to strengthen cooperation.

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
9/4	(三)We	19:00	☆☆☆	US 美國	MBA Mortgage	MBA 抵押貸款	+6.73%	+7.20%
9/4	(三)We	22:00	☆☆☆	US 美國	Wholesale Inventory	批發庫存	0.4%	0.3%
9/4	(三)We	22:30	☆☆☆☆	US 美國	Wholesale Transaction	批發交易	*1.2%	-1.5%
9/4	(三)We	22:30	☆☆☆☆	US 美國	EIA Inventory	石油庫存	+6.165MB	7.205M



World Observation

Day 1141
Russia/Ukraine Conflict

Ultimatum

US announced 34% Reciprocal Tariff on China, and China will levy 34% counter tariff on US. Donald Trump gave an ultimatum to China to cancel it or else after April 8th Washington time US will levy 50% tariff more on China which made the total tariff up to 118%. No country can bear such a tariff no matter what the cause is. China said to US they would fight back till the end, but domestically said *the sky would not fall down* which just gave consolation only and no practical action.

With effective from April 9th, over 70 countries will have trade talk with US. Israel Prime minister Netanyahu is the first leader that fly to DC for trade talk and more will be coming one by one.

The annual export of China to US is 400 billion dollar, while US to China is just 100 billion dollar. So there is few things China can do. What Trump calculates is not just these items, but also currency manipulation, government allowance, transfer of intellectual property and also hatred education against US which blames them all the way. China thought US gain a lot even so, for they can print out US dollar as much as they can, US let other people earn their money as their Hegemonies can grow bigger and bigger. US living standard are quite high and when without their cheap products Americans can hardly live.

Meanwhile, Apple and Tesla establish their factories in China, not only sell the product to China but also can sell to other parts of the world. So let's see how the Sino-US Tariff war carries on. China still have two trump cards, that is they can ban the factories of Tesla and Apple in China. So superficially, both sides are so rigid against each other, anyway secret talk need or else will go to the Cantonese saying of *Lam Chau*, that is *if we burn, you will burn with us*.



Top Components of DXYZ

SpaceX¹	52.4%	ClassDojo	2.2%
Revolut	9.4%	Chime	2.2%
Axiom Space	6.4%	Klarna	2.0%
OpenAI¹	4.4%	Brex¹	1.9%
Epic Games	3.2%	AtoB	1.8%
Instacart	2.6%	Relativity Space¹	1.4%
Stripe²	2.4%	Boom Supersonic	1.3%
		Superhuman	1.0%



Market Observation

Turning Crisis into Chances

Crude Oil
WTI
\$61.44

It was the age of wisdom, it was the age of foolishness. (Charles Dickens)

The market rebounded. Some people said it is not sure whether the rebound will carry on or not. So there is a stock can buy no matter in recession or prosperity. That is DXYZ. It is one of the very few stocks still running above the 250-SMA.

The Destiny Tech100 (DXYZ) actually is a close end ETF on IT stocks. But for those that want to buy the SpaceX, it is not yet publicized, and can buy the DXYZ. A lot of people are in afraid of recession, but we still have to live, eat and run during the recession. The landing of Mars project still will carry on, it would not stop or slow down because of recession.

The Apollo project of Moon Landing altogether had 6 trips to the moon and suspended in 1972. Why? Because Soviet Union was defeated by US. Thus no more competitor or threats in Space Industry. Until recently, China gave up the project of Landing of the Moon, but aim at Landing of the Mars and wish they can be the first country that land on Mars. Barrack Obama told NASA to make a plan to land on Mars on or before 2030. NASA asked help from SpaceX of Elon Musk, and he said the earliest time is 2029. Actually, China is chasing after closely, but not likely to surpass US, what they can do is an accelerator and pushed NASA to change their plan and land earlier.

The writer had not purchased any stock on April 2nd, 3rd or 4th, at last purchased DXYZ on April 7th. If you hold this stock till 2029 or 2030 the landing of Mars, your capital may be double, triple, quadruple.....For individual investors, they do not have so much funds to buy all at once, the best way is to use 6 months' time to buy in this stock no matter the market rise or fall. Do not sell it until the Landing of Mars. Thus you can change the current crisis into chances.

It was the season of light, it was the season of darkness. (Charles Dickens)