

US Stock Express

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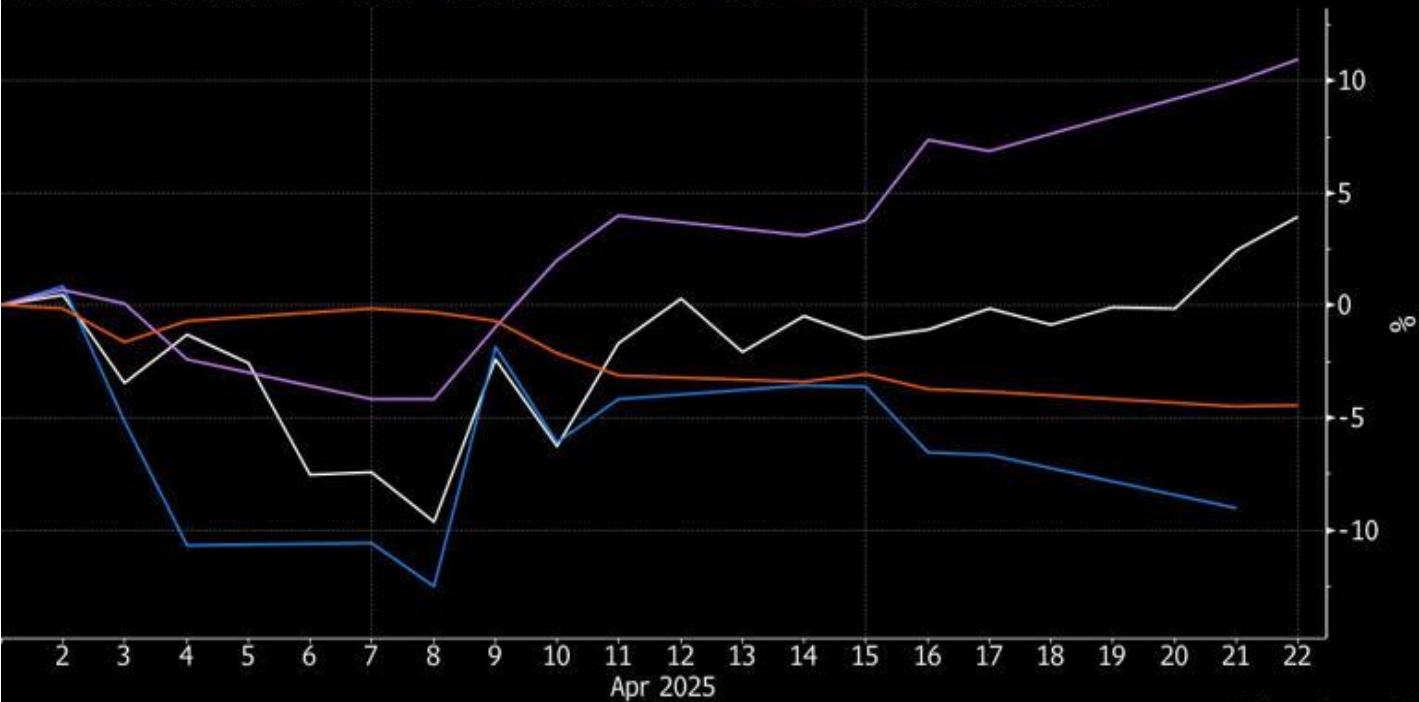
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Bitcoin, Gold Gain Since Start of Trump's Tariff War

Normalized As Of 04/01/2025 ■ Bitcoin ■ NASDAQ Composite Index ■ Gold ■ Bloomberg Dollar Spot Index



Source: Bloomberg

Bloomberg

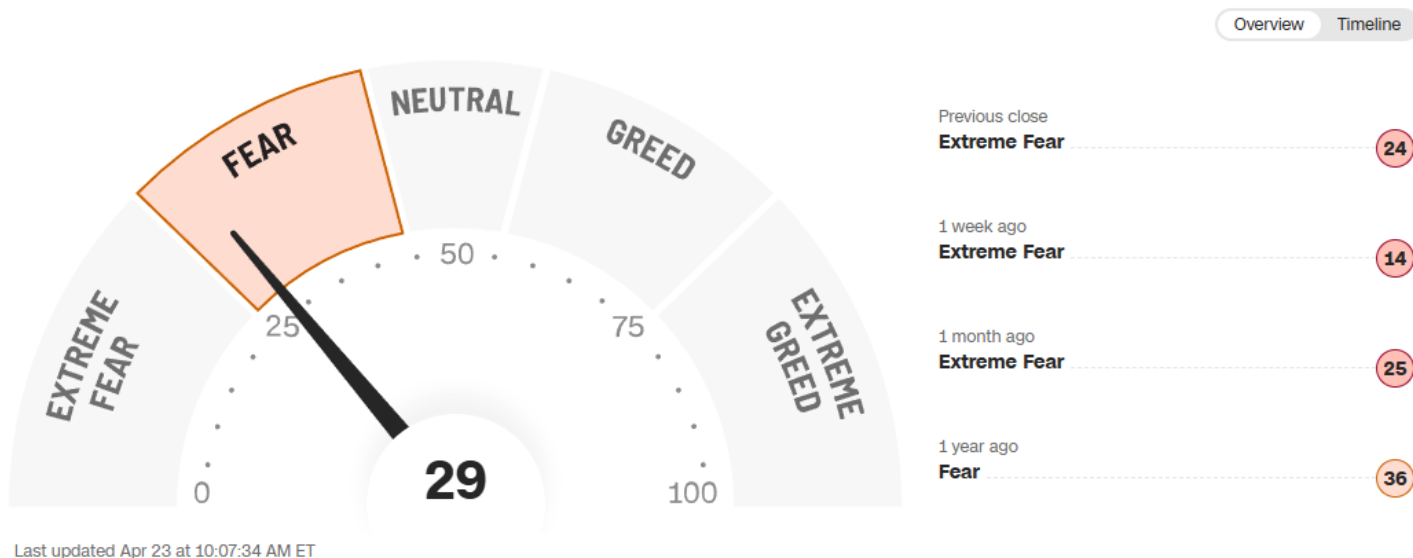
重要數據 Important indicators

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
24/4	(四)Th	20:30	☆☆☆	US 美國	Chicago National Ind	全國活動指數	0.18	0.40
24/4	(四)Th	20:30	☆☆☆☆	US 美國	Initial Claims	初領救濟金人數	215K	218K
24/4	(四)Th	20:30	☆☆☆☆	US 美國	Continuous Claims	續領救濟金人數	1,885K	1,888K
24/4	(四)Th	20:30	☆☆☆	US 美國	Durable Goods	耐用品訂單	1.5	1.0
24/4	(四)Th	22:00	☆☆☆	US 美國	New Home Sales	現屋銷售	-3.0%	4.2%
24/4	(四)Th	22:30	☆☆☆	US 美國	Existing Home Sales t	成屋銷售	4.14M	4.26M
24/4	(四)Th	22:30	☆☆☆	US 美國	EIA Gas Report	EIA 天然氣	+73b	+56b

Fear & Greed Index

What emotion is driving the market now?

[Learn more about the index](#)



North East West South is NEWS

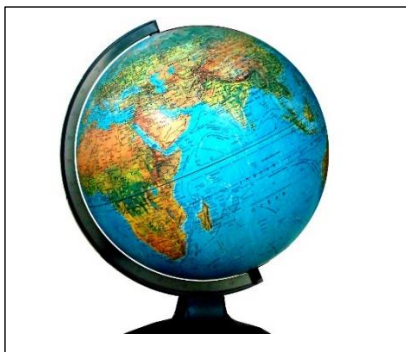
The European Union said it would fine Apple 500 million euros and MetaMeta 200 million euros for violating the Digital Markets Act (DMA).

European Central Bank President Christine Lagarde said she hoped Trump would not rush to fire Powell.

Goldman Sachs CEO David Solomon said in a recent interview with CNBC that the Trump administration should first try to reach some trade agreements to show investors how it works and provide an understandable framework, which will help the U.S. stock market.

US Vice President Vance held talks with Indian Prime Minister Modi. After the meeting, the two countries reported separately that they had made significant progress in reaching an agreement on bilateral trade.

The U.S. Court of International Trade rejected a request by a group of small businesses to suspend U.S. President Trump's tariff measures, saying the companies failed to prove the tariffs would cause immediate harm to them. The three judges of the court ruled that the tariffs could remain in effect during the litigation.



World Observation

Day 1156
Russia/Ukraine Conflict

Birthday Party

Donald Trump is doing and saying in different directions, anyway bring hope to the market. Besides 3521% tariff on Cambodia to prevent trade fraudulence of origin laundering, he said tariff on China can be greatly lowered but not zero. Actually, it is what everyone expecting. No one would expect it will come to zero or kept in level of 245%. He said that negotiation had already began but without giving detail of which level or timing. Another way is that he has eaten his own words of firing Fed chair Powell.

Stock market had great rebound and the low seemed had already reached and gone with the wind.

In late Feb, news said there would be a summit of Trump and Xi, but the US version was different from Chinese version. China said Trump will come to China for meeting in April, but US version said Xi would fly to Mar-A-Lago for birthday party. For the birthday of President Xi is on June 14th and Trump on Jun 15th, so at 24:00 of 14th and 00:00 of 15th, they will celebrate together.

Because of Liberation Day Tariff, the meeting of April vanished silently. Later, when Trump said over 75 countries were approaching him to have trade talk and would be done in 90 days. So he is quite busy in these 90 days, but people still expect the talk with China should be made around those 90 days. No one would expect the talk will postpone to midterm election of 2026.

The birthday party is one of the greatest chance of compromise, but we still have to wait for official announcement and hope it can come true soon.



Market Observation

Gone Are Rainy Days

Philadelphia
Semiconductor

4,044.76

+212.71
(+5.55%)

Please refer to The Express of April 7th, that was an extra long version on that day showing the greatest fall of DJIA, NASDAQ and S&P. The market fell greatly on that day and the writer purchased DXYZ on the bottom, and even one week later still asked investor to buy. The last sentence on that day was

It was the spring of hope, it was the winter of despair.

On next day, the heading was “Keep Calm & Carry on”. Both days the Fear & Greed Index was 4 and now 29.

Since December a lot of people asked should they buy TSLA and AMD, and I kept on saying no. But now is the time for buying, not for long term, but just for rebound. Full Self Driving can only come out on version 14 in June and version 16 will be complete non-monitored which will come out in Dec 2025, and Optimus Robot will manufacture 50,000 in 2026.

Better concentration on 4 stocks, which are PLTR (+9.67%), DXYZ (+7.448%), SOFI (+5.989%) and TEM (+17.07%), all higher than 3 major indexes. Even the lowest point was shown on April 7th, but still can purchase now. So what will be the day of profit taking? In 2029 or 2030, on Landing of Mars. Your profit will be like that of Warren Buffet which can always earn 500%, 1000%. 2000% or 3521%. Mind that this is not tariff, very likely your own profit as much as Cathy Wood or Warren Buffet, and not just 5%-10% of short term trading.

It was the best of times, it was the worst of times! (Charles Dickens)