

# US Stock Express

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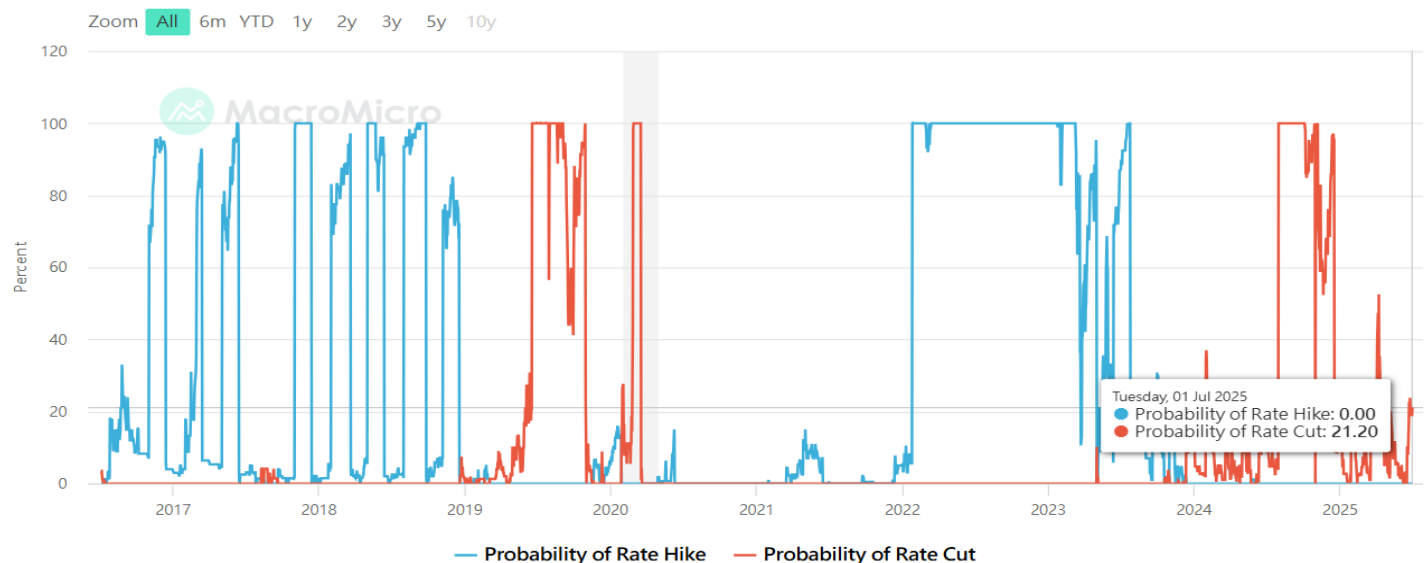
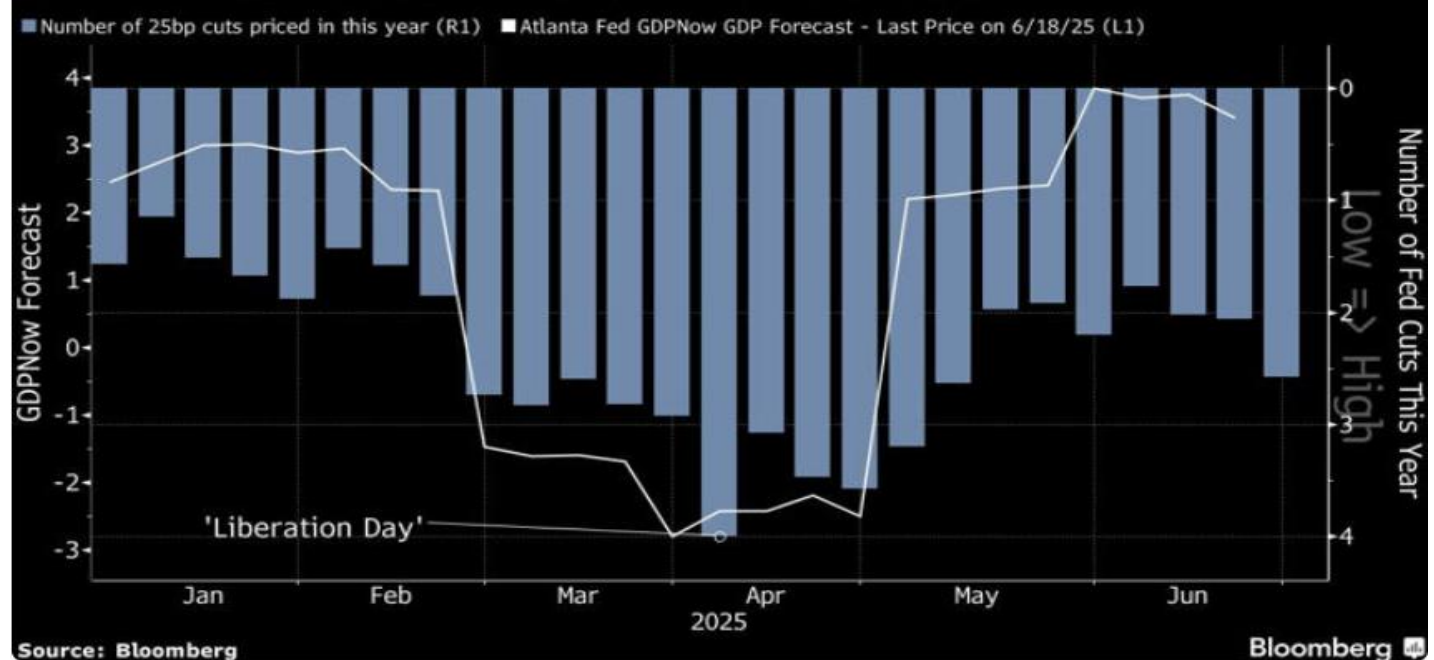
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## Bond Investors See At Least Two Rate Cuts This Year

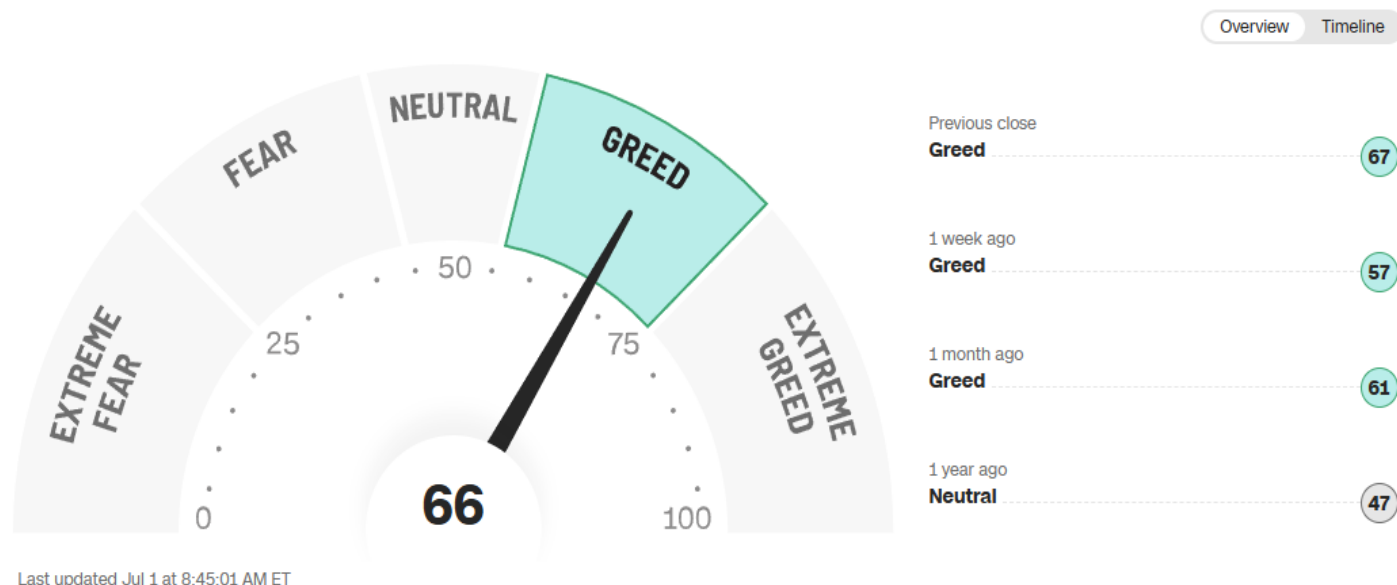


CME Fedwatch expect probability of rate cut in July is 21.20%

# Fear & Greed Index

What emotion is driving the market now?

[Learn more about the index](#)



## North East West South is NEWS

The Canadian Ministry of Finance said that it has canceled the digital service tax on American technology companies and will resume trade negotiations with the United States. US President Trump recently announced the termination of trade negotiations with Canada due to dissatisfaction with the digital service tax.

Israeli Foreign Minister Gideon Saar said that Israel is "interested" in reaching a "peace and normalization of relations" agreement with its neighbors Lebanon and Syria.

"Foreign Affairs" magazine recently published the latest report of the US think tank, entitled "US Foreign Policy after Returning to Leadership", revealing that although Trump's policy seems to weaken the United States' global leadership, it is actually a continuation and deepening of strategic reconstruction, intending to make NATO self-reliant and self-reliant, and instead focus on confronting China.

With the listing sensation in the market, "the first stablecoin stock" Circle (CRCL-US) announced that it is applying for a US national trust bank license, and is expected to establish the first "National Digital Currency Bank" in the United States, further promoting the integration of digital currency and traditional financial systems.

U.S. President Donald Trump's administration's decision to cut foreign aid could lead to the deaths of more than 14 million people by 2030, including more than 4.5 million children under the age of five, according to new research published in The Lancet medical journal.



## World Observation

Day 1225  
Russia/Ukraine Conflict

### Decisive July

Why July is important? Why is it so decisive? Russia is preparing a grand summer attack to end the war. For tariff war, there is an extension of 90 days which will end on July 9<sup>th</sup>. Israel ended the war with Iran but now going have compromise with Palestine. Deadline of TikTok already extended to September. One Big Beautiful Bill Act will extend 30 days in Senate and waiting for a combine act with House. The FOMC meeting will disclose whether September would cut interest rate.

Since Ukrainian war broke out in 2022, the first 2 summers, people were waiting for the counter attack of Ukraine in summer, but regret no major progress. In 2024 and 2025, its time of Russia wanted to have further attack. Their economy was support by petroleum and China is the largest buyer which made the world a little surprised that Russia can survive under sanction of the west. Now both sides are exhausted and they really want to end the war. Russia and Ukraine are ready to have ceasefire on the current borderline, so before the deadline comes, both sides just want to advance as much as can be.

For tariff war, some are under negotiation, some may extend further to Labor Day in Sep, and some will have no choice but US will announce the tariff on their own. Anyway, other countries would know that should be under the level of China. It may bring about negative effect on stock market, but everyone is ready to buy at low, so the bottom of April 7<sup>th</sup> is very hard to reach again. Any drop will trigger people to buy at low. Brazil has the second largest production of rare earth, India has the third in the world and they are ready to replace China. It would take some time but not now.

US help Israel in the Midnight Hammer operation so this time easier to persuade Israel to have ceasefire. Interest rate cut in Sep 16-17 according CME target rate is 76.8%, so people still wait for the statement of FOMC in Jul 29-30 meeting.

Last 271.665 Change -3.985 (1.446%)

Updated: 2025/07/01 10:03 EDT

Broadcom Inc. (AVGO.US)

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1 year (daily)  
SMA(10):261.919 SMA(20):257.133 SMA(50):230.82 SMA(100):212.133 SMA(250):193.459  
www.aastocks.com

01/07/2025 O:274.28 H:274.4 L:270.2401 C:271.7



DJIA Last 44,200.38 Change +105.61 (0.24%)

Updated: 2025/07/01 10:04 EDT

Dow Jones Industrial Average (DJIA.US)

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1 year (daily)  
SMA(10):43074 SMA(20):42847 SMA(50):41940 SMA(100):42059 SMA(250):42152  
www.aastocks.com

01/07/2025 O:44061 H:44239 L:44014 C:44190





## Market Observation

# AI, AGI & Semiconductor (3) AVGO

**SOFI**

**18.290**

+0.0085

(0.422%)

How is AVGO different from other AI stocks? It is unique in the market. Basically, semiconductor stocks can be divided into designer and manufacturer. The user is also the designer, like NVDA, MSFT, APPL, AMZN, GOOG....., TSM is only responsible for manufacturing, but AVGO possesses both. That is why it is said to be the next NVDA.

Mind that a lot of stocks are prosecuted by European Union, either in breach of monopoly or competition law, including GOOG, AMZN, AAPL. For AVGO, it also had been charged by EU of violation of competition law. Never mind, they have the right to employ a group of best solicitors in the world and fight down to even a penny. They can argue for any single point which they think should fight for and would never like Alibaba and Jackie Ma which dropped down dramatically.

Recently, 3 major indexes are all on record high, it is quite hard to chase high, but if you do not chase it will lost a lot of chances, when you cannot bear and buy later, it will be more expensive than now. Actually NVDA, AVGO and TSM are all on record high, if the market retreats at this moment, it's the best time to buy, for no one will expect it can drop down to the bottom of Liberation Day in April.

So if you target is placed upon Landing of Mars, that is aiming at 2029 or 2030, there should not be any problem. Please compare with the Dow Jones chart and can found that when DJIA is under the 250-SMA, it once dropped quite deep, and when went up the 250-SMA, DJIA only up a little. For AVGO, it's the reverse, it only dropped a little when under the 250-SMA, but when over, it has a long way to go up. This proves the outlook and the past are also better than DJIA.

**AVGO won!**