

US Stock Express

Daniel Yue

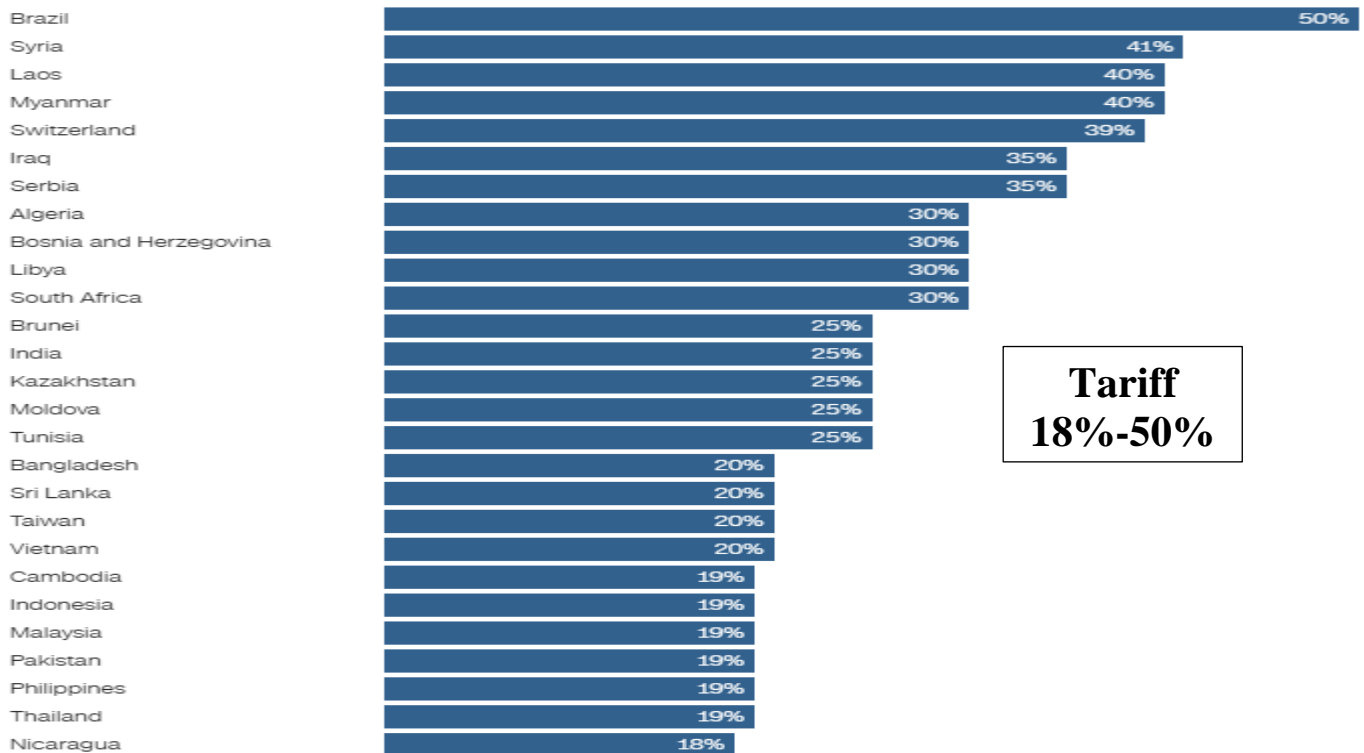
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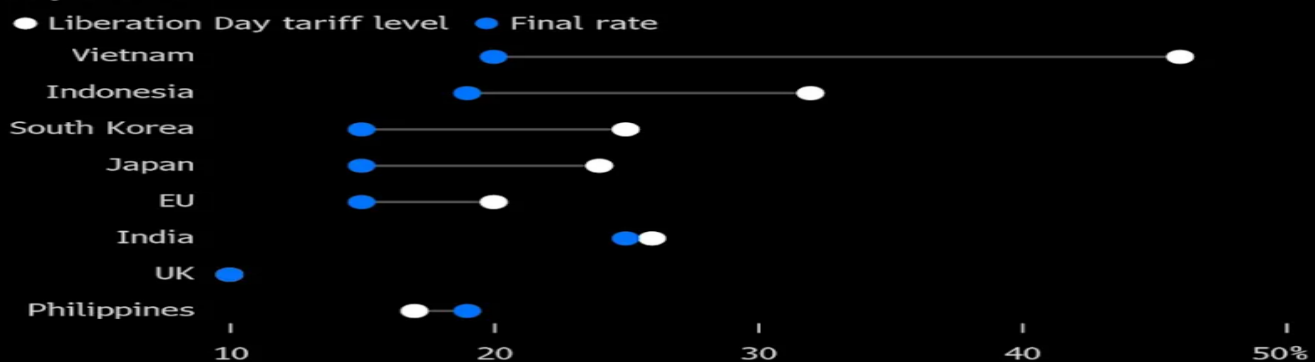
Tariffs above 15%



**Tariff
18%-50%**

Most Countries With Deals Got Better Tariff Rates

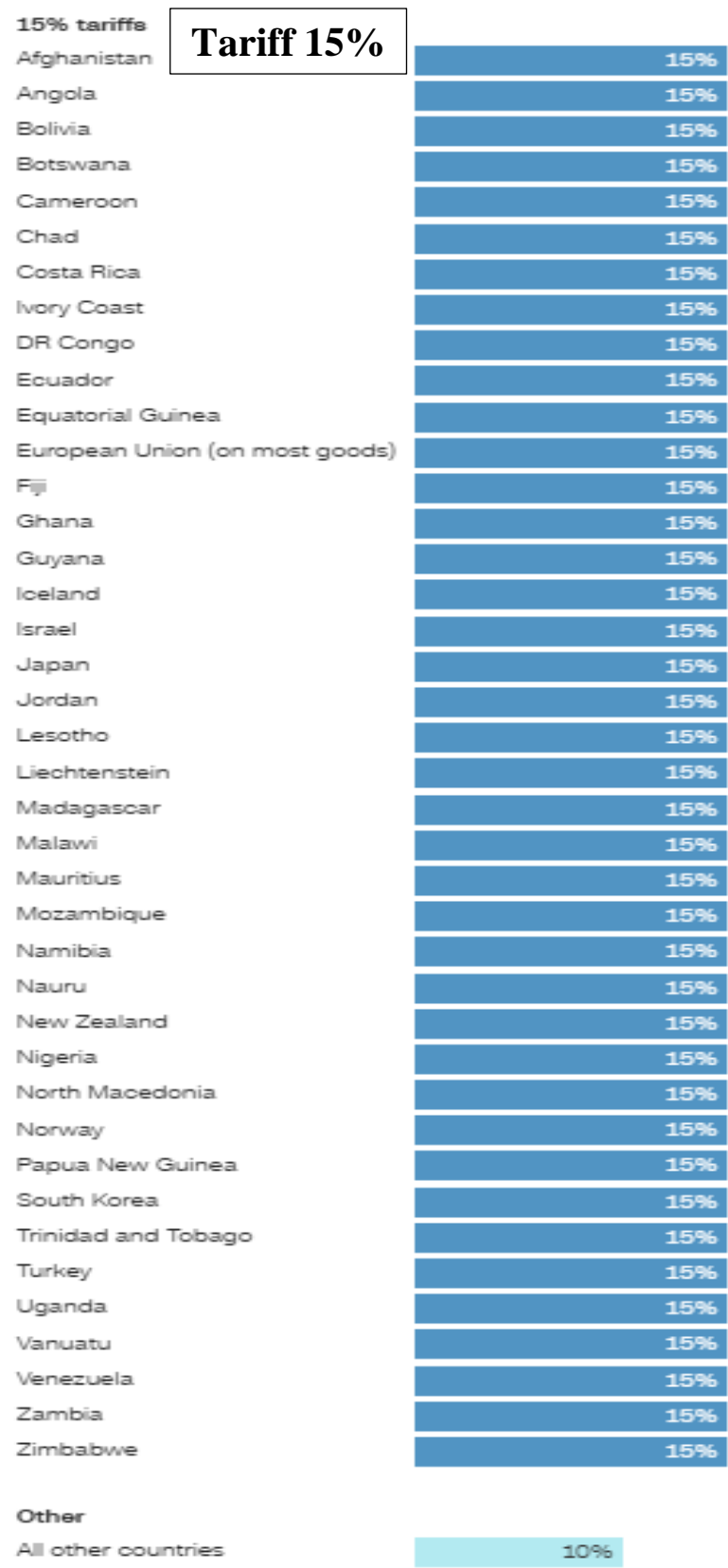
Countries with US trade deals largely negotiated a rate below Liberation Day levels



Source: Government announcements

Note: List includes only those deals where tariff rates are publicly available

Bloomberg



These are the countries affected by Trump’s latest tariffs

(news from CNN)

Starting August 7, the United States will impose a 10% “universal” levy on imported goods from countries with which it has a trade surplus and a 15% tariff on goods from about 40 nations with which it has a trade deficit. Some countries, like Brazil, face levies ranging up to 50%.

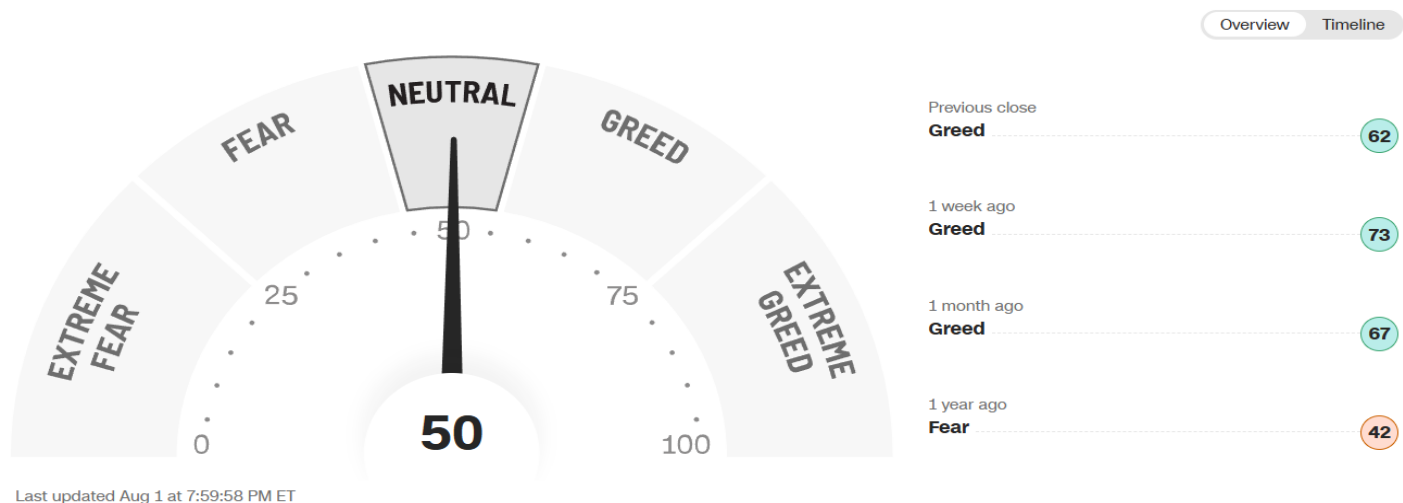
President Donald Trump announced new country-specific tariffs on Thursday

The 10% universal tariff stays, but about 40 countries with which the US runs a trade deficit will now face a 15% rate. Some will be hit with even steeper rates, such as Brazil's 50% total rate after an additional 40% was imposed on Wednesday. These new tariffs – some of which were set through trade deals – will take effect August 7.

Fear & Greed Index

What emotion is driving the market now?

[Learn more about the index](#)



North East West South is NEWS

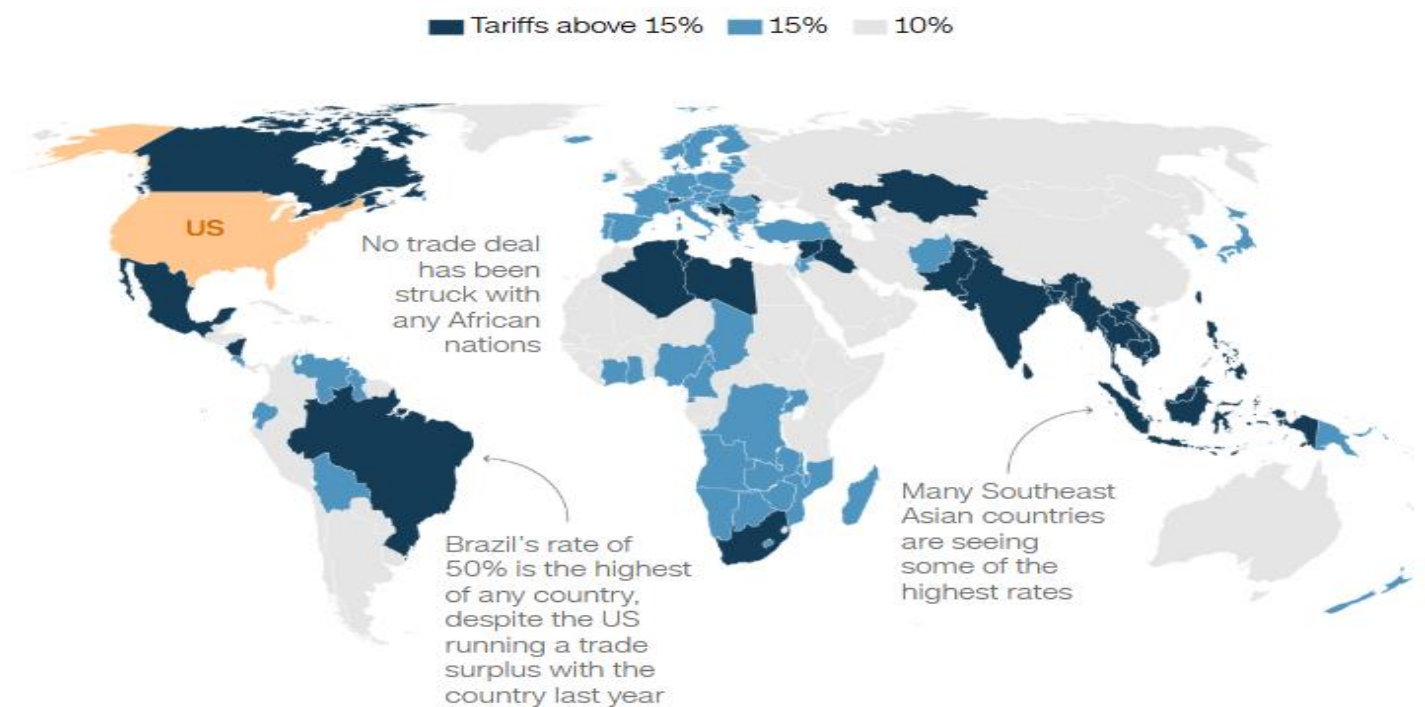
President Donald Trump issued a rare threat of nuclear escalation on Friday, saying he had ordered two nuclear submarines to be strategically positioned near Russia in response to what he said were aggressive remarks by Dmitry Medvedev, the country's former president and current deputy chairman of its Security Council.

Yale University estimates show that as of July 31, the average effective tariff rate on imported goods in the United States reached 18.3%, the highest level since 1934. The tariff policy will reduce U.S. real gross domestic product (GDP) growth by 0.5 percentage points each year in 2025 and 2026. The tariffs will increase the unemployment rate by 0.3 percentage points by the end of 2025 and by 0.7 percentage points by the end of 2026.

The Labor Department said the U.S. added 73,000 jobs in July, pushing the unemployment rate up to 4.2% from 4.1%. May hiring was revised down from 144,000 to 19,000, and June hiring was revised down from 147,000 to 14,000. This is significantly lower than recent job creation levels.

President Trump later announced he had ordered the dismissal of Erika McEntarfer, the Commissioner of the Bureau of Labor Statistics, accusing her of manipulating employment data for political reasons. Job growth fell short of expectations in July, and revised hiring figures for recent months show the worst performance since the COVID-19 pandemic.

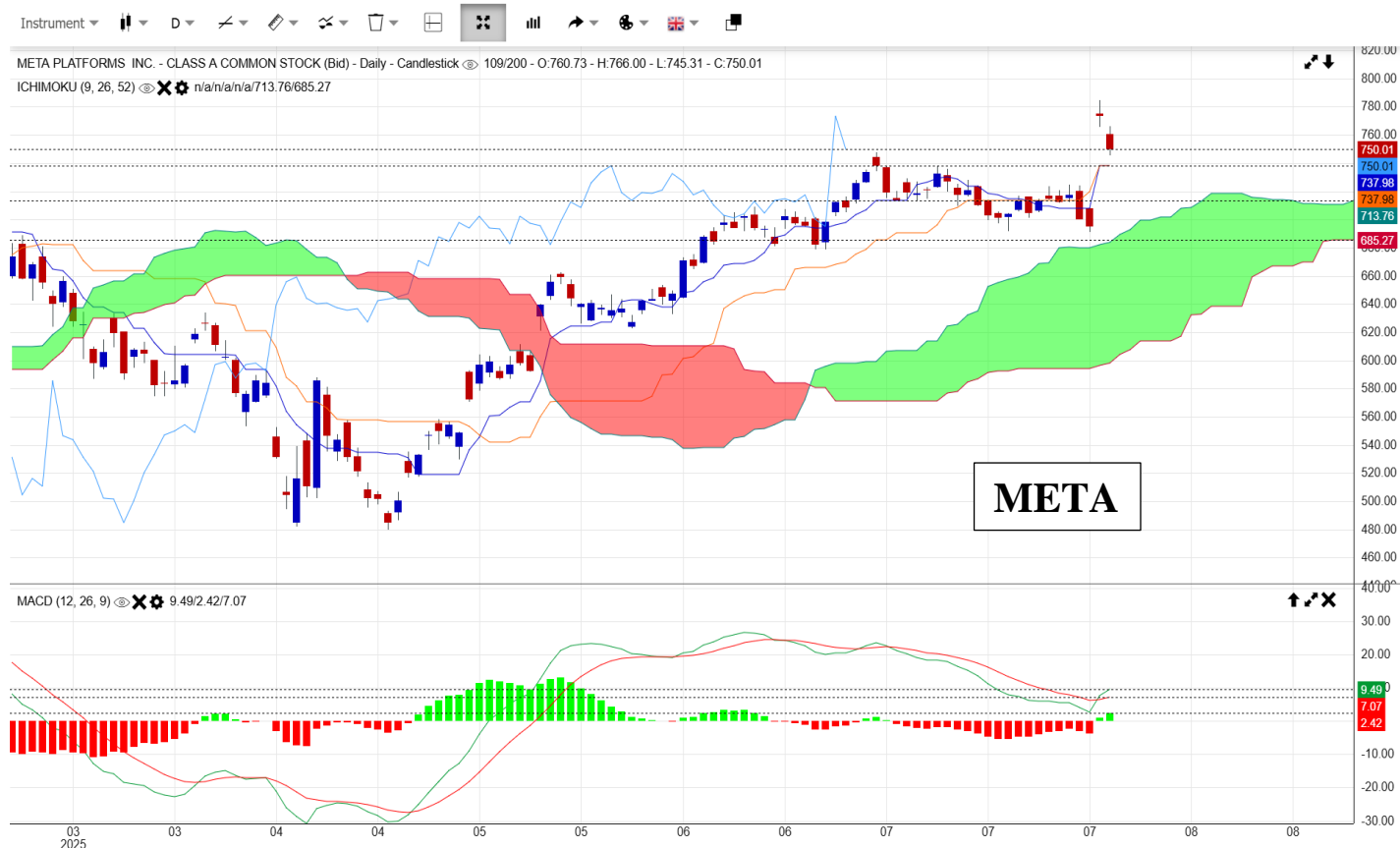
US President Trump's special envoy, Steve Wyckoff, visited a US-backed food aid distribution center in Gaza today and pledged to propose a plan to deliver more food to the region. Meanwhile, the United Nations reported that hundreds of famine-stricken Palestinians awaiting aid have been killed by Israeli forces in the past two months.



Note: Canadian and Mexican goods that are not exempted by the USMCA free-trade agreement face a tariff of 35% for Canada and 25% for Mexico. Most Chinese goods face a 30% tariff with some exemptions.

Source: White House

Graphic: Annette Choi and Rachel Wilson, CNN



META is benefitted most and its advertisement growth rate is tremendous, technically supported by Ichimoku and MACD.



World Observation

Day 1258
Russia/Ukraine Conflict

Tariff War

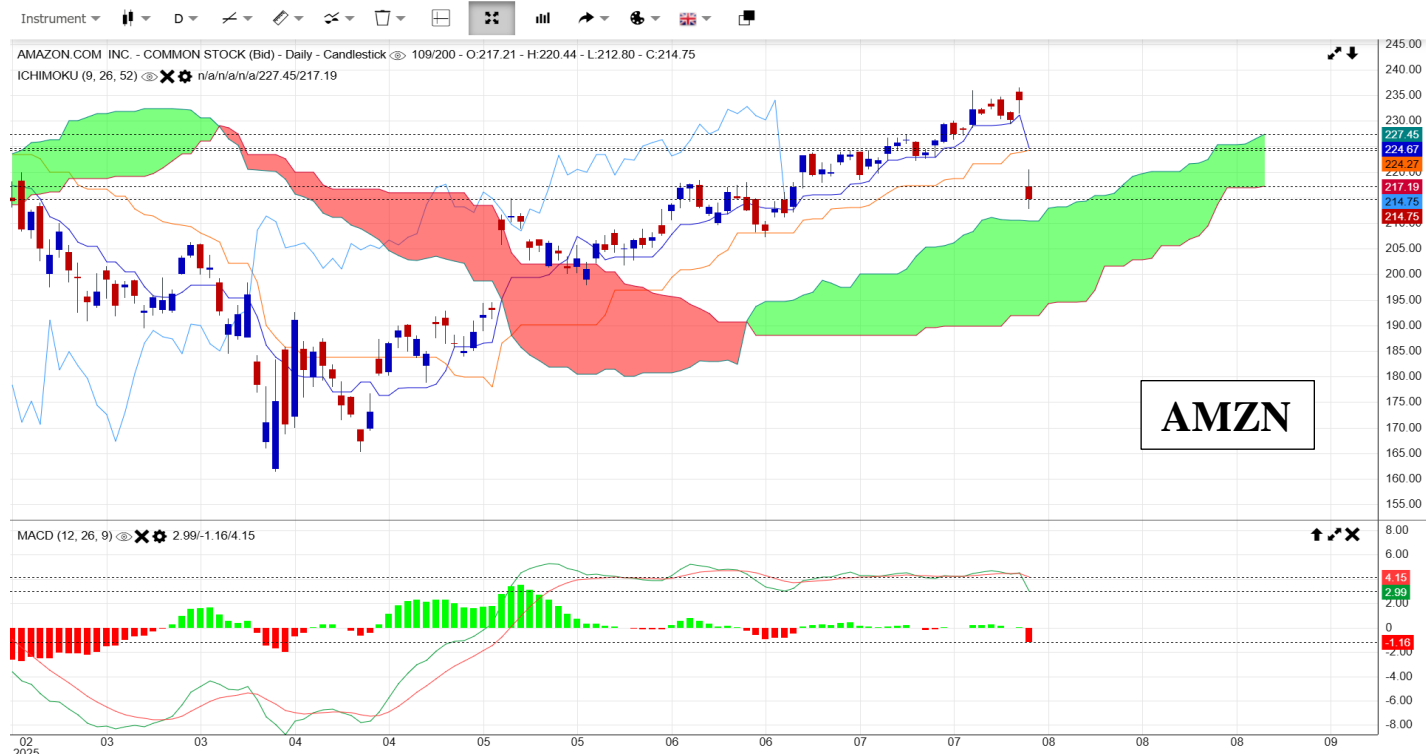
(1) Liberation Day 2.0

The tariff war of Donald Trump is as dramatic as Korean TV shows, and the global effect is as worldwide as Hollywood movies. On the Liberation Day of April 2nd, market sentiment was so gloomy that stocks had a prominent crash and made people felt grey on all American assets, not just stocks. Now the Liberation Day 2.0 on Aug 7th, stock prices just reached record high and had adjustment. The soaring up is the fastest ever in history. Normally, US stock market only falls quickly, but rises slowly in long bull market, never had such a steep slope of rising. Investors are lucky to feel such a heartbeat of history.

It is not a FULLSTOP now, even major negotiations are over. With effective from Aug 7th, all countries have to pay the new tax which is from 10% to 50%, but China is in exception. On Aug 9th, Russia had to carry out long term ceasefire in Ukraine or else will be levied 100% tariff and those who trade with Russia will also face such a tariff. On Aug 12th, it is the deadline of trade talk with China, but both sides are ready to have an extension of 90 days. On Aug 29th, all small parcel under US\$800 will also have to pay their tariff.

What Donald Trump minds most of course is revenue. Recently he has collected US\$150 billion in tariff. But basically, there is no recession in US, for the tariff is shared by 3 parties that is manufacturer, importer and end-user. Some other countries in Asia had recession if they rely too much on US. As production line is shifted, some country like India got a lot of benefits, for the Apple i-phone, now US is having the largest import from India, already overtook China.

However, there is a time bomb that is China. There are still great uncertainties, the trump card of China is rare earth. US is arranging alternative from other countries, but it takes time. Such as production line of i-phone started to shift in Feb 2020, and India overtook China just in July 2025... more will be talked tomorrow.



All potential stocks are on high except AMZN adjusted according to Fibonacci series, that is of lower risk.

Last 173.720 Change -4.150 (2.333%)

Updated: 2025/08/01 20:18 EDT

NVIDIA Corporation (NVDA.US)

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01/08/2025 O:174.09 H:176.54 L:170.89 C:173.7

3 year (daily)
 www.aastocks.com

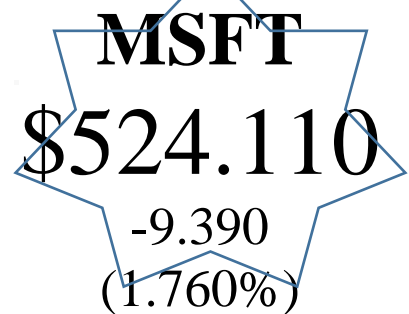


Since October 2022 the Orion Meteoroid Shower, I told investor to buy the NVDA, now it proved the fall of Covid-19 ended there and opened a new page of 4 Trillion capitalization. At that time NVDA ranked 5th among the Magnificent 7.



Market Observation

Magnificent 7, 8, 9




In the beginning of 2025, most people forecasted this year would S&P would rise to 6,600 points but there should be a prominent adjustment. However, it is hard to say whether it would come in first half of second half of the year. Now the market rose up to record high after the crash in April, there everyone is waiting for a drop to buy in. Most people still set their target of S&P at 6,600 or 6,700.

Therefore any adjustment will be a golden chance of buying. Since the market is near record high, so better buy those blue chips like Magnificent 7 to lower the risk. The Magnificent series can be divided into 4 groups.

- (a) **King of Kings**: NVDA, MSFT. The market capitalization of NVDA on closing of Aug 1st (Fri) is \$4.1 Trillion and MSFT is 3.8 Trillion, while the GDP of UK in 2024 is just 3.6 Trillion. Either one is more than the whole UK. That is why Wall Street is Wall Street, Silicon Valley is Silicon Valley. NVDA is expected to be the first company that reaches 5, 6, 7 Trillion in the next few years. As for META, the advertisement revenue reached \$46.56 billion, out of a total \$47.52 billion in revenue - meaning ads made up nearly all of META's income, quite promising. As AMZN, the investment in AI is \$100 Billion the greatest among the Magnificent Seven. Therefore, these 4 stocks should put in first rankings and should hold at least 2 in hand.
- (b) **Lord of Lords**: GOOG is in ranking of Lord of Lords because of quantum computer and now not yet reach record high, still much room for rising.

- (c) **Stars of Tomorrow**: AVGO is said to be the Magnificent 8 soon or the next NVDA; TSM is said to be the Magnificent 9 soon also the next NVDA.
- (d) **Hibernation**: TSLA will have full self-driving and but not in this year. Development of humanoid robot is slower than expectation, the outlook is quite good in 2026 or 2027. APPL already lost its glamour, its apex is in the era of i-phone 5 to i-phone 10. Now hard to have any breakthrough for already too many breakthroughs in the past. Both waiting for re-generation of power.

In order to make your investment account stable, so when crash comes still can recover soon, a smart investor should hold at least 3 stocks among the magnificent series, out of which 2 should be in group (a) King of Kings. Then you are practically part of the King of Kings.

 How Amazon Compares to Other Tech Giants By Microsoft AI		
Company	2025 AI Investment (Capex)	Key Focus Areas
Amazon	~\$100B	AWS, AI chips, infrastructure, consumer AI tools
Microsoft	~\$80B	Azure, OpenAI partnership, global data centers
Google (Alphabet)	~\$75B	Gemini AI, Cloud AI, data centers, subsea cables
Meta	\$66–72B	Superintelligence Labs, Titan clusters, smart glasses
Apple	~\$14B (Q3 extrapolated)	Siri overhaul, Apple Intelligence, AI server factory

AMZN has the largest investment in AI among the Magnificent Seven, and has the lowest level for investors to enter now.