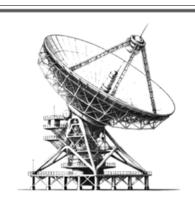
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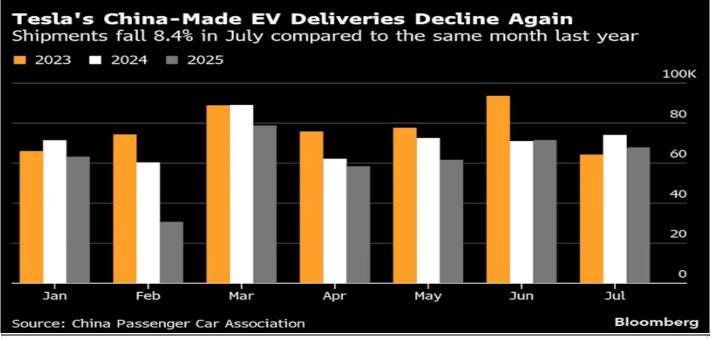
Daniel Yue

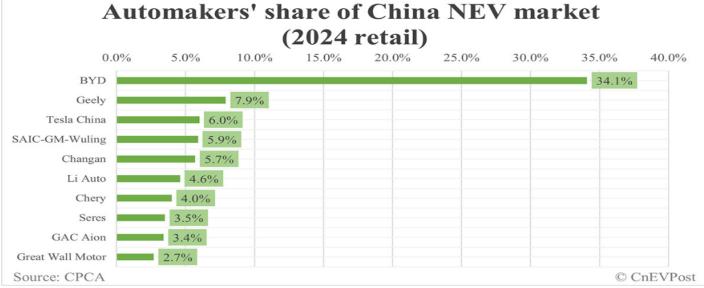
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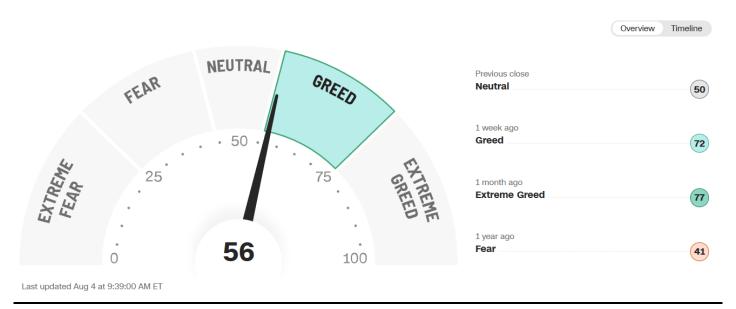
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Fear & Greed Index

What emotion is driving the market now? Learn more about the index



North East West South is NEWS

Data released by the U.S. Department of Labor on the 1st showed that the U.S. unemployment rate rose month-over-month in July, with non-farm payroll growth that month falling short of market expectations. The Bureau of Labor Statistics also significantly revised downward the non-farm payroll figures for May and June. The Bureau of Labor Statistics' significant downward revision of the May and June employment data sparked strong dissatisfaction from Trump, who quickly replaced Erica McEnthorpe, sparking bipartisan controversy in Congress.

A report released by the Yale University Budget Lab indicates that the average effective tariff rate for various tariffs implemented by the U.S. government this year has reached 18.3%, the highest level since 1934. These tariffs will cause U.S. prices to rise by 1.8% in the short term, equivalent to an average loss of \$2,400 per household this year.

The L-shaped design of the stainless steel metal casing for the Apple iPhone 17 Pro battery has been revealed: two different versions have been revealed: one for the U.S. market and the other for the Chinese market, each tailored to specific needs.

Apple (AAPL) CEO Tim Cook held a rare all-hands meeting to urge employees to focus on the company's AI prospects and "amazing" product pipeline. Apple is investing heavily in AI, with 40% of the 12,000 employees it hired last year working in research and development.

Tesla sold 67,886 vehicles wholesale in China in July. This figure does not break down exports and domestic sales. Compared to the same period last year, sales were down 8.4%.



World Observation

Day 1259 Russia/Ukraine Conflict

Tariff War (2) Deadline For Russia

Once Donald Trump issued an ultimatum to Russia that they must end the war in Ukraine in 50 days or else would face a tariff of 100%. The writer already said his policies needed to be up-date, up-hour, up-minute and up-second. Later on, he said the deadline will be just to 10-12 days. So it should be on Aug 8th to 10th. Mind that on Aug 10th there is another Six Planet Alignment. (Refer to page 4 please)

Superficially, all major trading partners had settled at least a framework with US in tariff except China which is very likely to extend for 90 days and still can have a further extension at that time. Russia is not a major trading partner with US. But the problem lies on secondary sanction, that is whosoever buys Russia energy will also face 100% tariff. China already said they would continue to purchase Russia petroleum and that's why the former Russia president Dmitry Medvedev issued nuclear threat and Trump deployed 2 nuclear submarine to appropriate locations. Watch out! This time Trump would not chicken out, no TACO. He surely will do something because of the power of Mercury, Venus, Jupiter, Uranus, Saturn and Neptune.

Based on the most recent data, Russia and the United States rank quite low in each other's trade volumes, especially following sanctions and geopolitical shifts in recent years.

RU Russia's Ranking in U.S. Trade

By Microsoft AI

- In 2024, Russia accounted for only 0.1% of total U.S. imports, placing it outside the top 30 trading partners 1.
- U.S. imports from Russia totaled \$3.3 billion, down from \$15.1 billion in 2022 1.
- · Russia ranked far below major partners like China, Mexico, and Canada.

us U.S. Ranking in Russia's Trade

- In 2021, the U.S. was Russia's 5th largest import partner, contributing \$17.3 billion or 5.88% of Russia's total imports 2.
- However, by 2024, U.S. exports to Russia dropped to \$526 million, making up just
 0.03% of total U.S. exports globally 1.
- This steep decline suggests the U.S. is no longer a top trading partner for Russia.
- Summary: Both countries have significantly reduced trade with each other. Russia is a minor player in U.S. trade, and the U.S. has fallen out of Russia's top import sources.



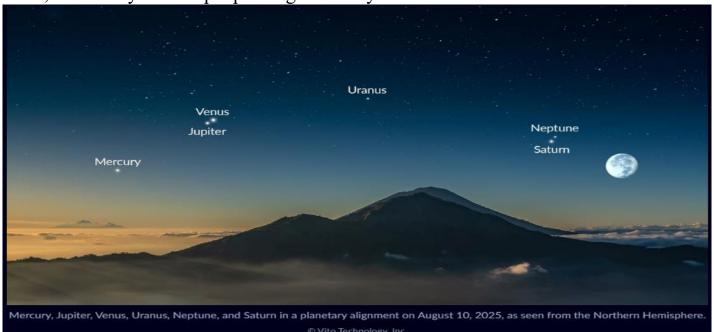
Market Observation

A 5-year Investment Plan



Yesterday the writer talked about the current AI trend was generated in Oct 2022 by the Orion Meteor Shower. If you missed the bottom, don't worry! Trump sworn in office on Jan 20th and immediately there is the Six Planet Alignment on Jan 21st.

Anyway, in the coming 5 years, investors not only can ride the wave of AI, and should have something more. As a matter of fact all AI stocks are too high now, some people missed them, some even bought them but took profit so early. So what should they do? Another trend is coming, but few people talked about it. That is the Landing on Mars. When everyone is talking about this subject, you will find the related stocks are too high, or even higher than current AI stocks. Please refer to The Express on July 3rd and July 5th. Why so many people neglected Mars Landing? See in the following chart, there is no Mars, that's why a lot of people forget it. Only smart investors can know the reason!



https://starwalk.space/en/news/what-is-planet-parade

Parallel to the above, stocks can hold until Landing on Mars are PLTR, TEM, SOFI, MSTR, COIN, AMD. Besides short term and long term project, anyway a smart investor should have a 5-year plan since most of the bull market in US lasts longer than 5 years.