

US Stock Express

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Last 13.980 Change 0.000 (0.000%)

Updated: 2025/09/22 16:01 EDT

BYD Co., Ltd. (BYDDY.US)

Delayed Chart - 8 year (weekly)

SMA(10):14.311 SMA(20):15.552 SMA(50):14.413 SMA(100):11.927 SMA(250):10.796

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22/09/2025 O:14.05 H:14.16 L:13.95 C:13.98

Profit of 3890%
By Warren Buffet

BYDDY

Warren Buffet announced to clear up all stocks of BYDDY in his trading of Berkshire and at length got a profit of 3980% after 17 years of investment which is one of his masterpieces. During the fall of China concept stocks, I told investors not to touch any China concept stocks but BYDDY. Now, there is no more China concept stocks in Berkshire. He changed to invest in TSM. Practically, a lot of individual investors had been trading stocks for more than 17 years no matter in US or other countries and still cannot get such a profit. Warren Buffet really deserves this name ----- "God of Stocks"!

Taiwan Semiconductor Manufacturing Company Ltd. (TSM.US)

6 months (daily)

SMA(10):262.115 SMA(20):249.474 SMA(50):242.83 SMA(100):223.401 SMA(250):202.364

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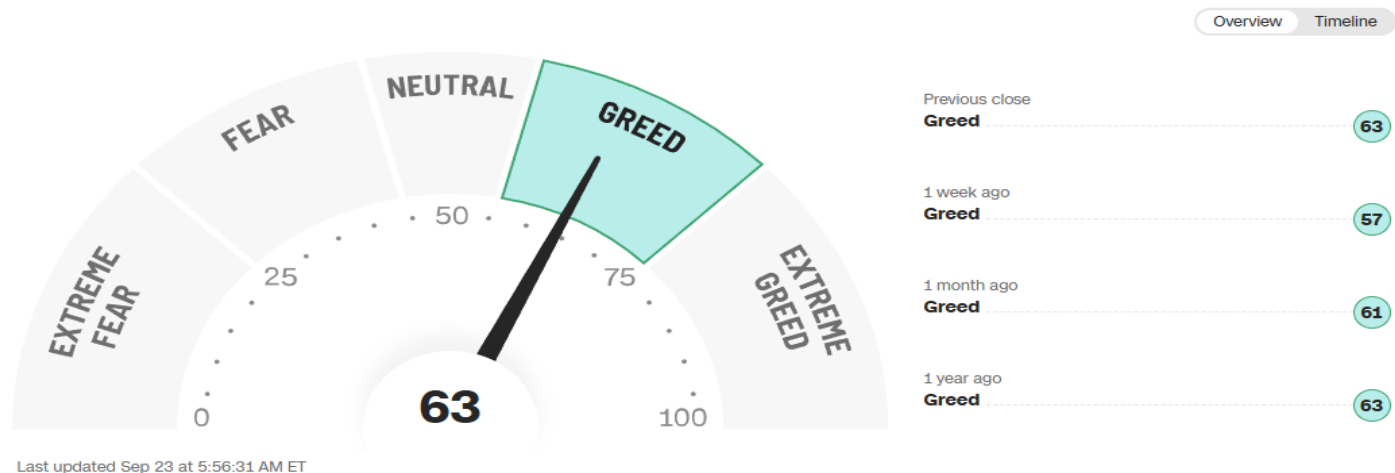
AASTOCKS.com Copyright © 2025
22/09/2025 O:266.54 H:276.36 L:265.45 C:272.1

TSM

*Risk disclosure: Price can go up and down at any moment, use free money to trade and bear the risk according to your own capital;
 Never trade with money that has a deadline for withdrawal.
 All suggestions are for reference only, even AI cannot be 100% reliable, final decision still lies upon investors.
 Copy trading cannot replicate another trader's background or psychological state.*

What emotion is driving the market now?

[Learn more about the index](#)



North East West South is NEWS

Chip giant Nvidia announced it will invest up to \$100 billion in artificial intelligence giant OpenAI to build next-generation artificial intelligence infrastructure. The partnership will enable San Francisco-based OpenAI to use Nvidia's systems to build and deploy AI data centers, utilizing 4 million to 500 Nvidia graphics processing units (GPUs). The first batch of new systems is expected to be operational in the second half of 2026.

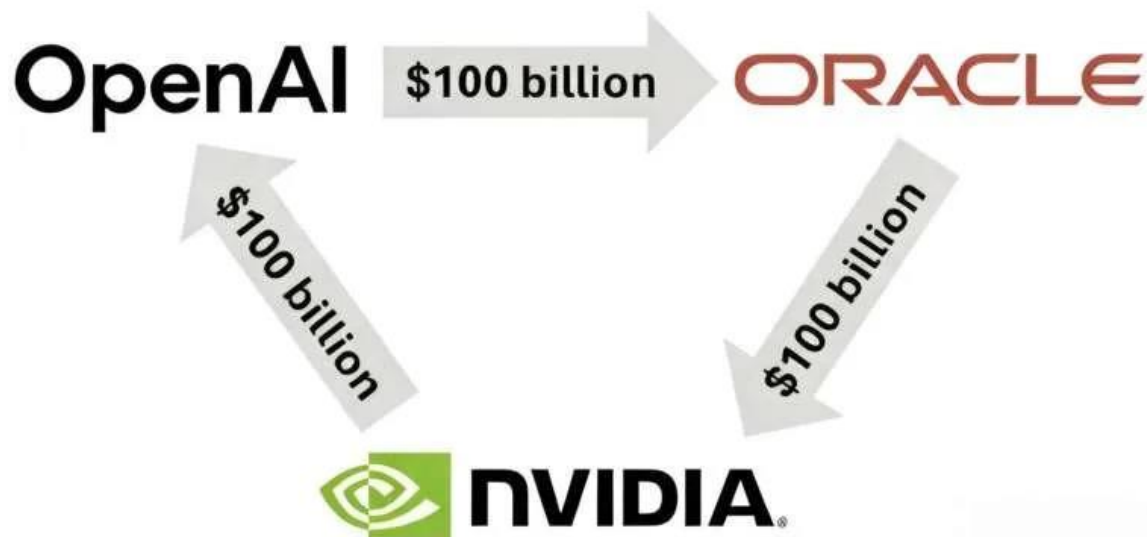
Over \$1.5 billion in long cryptocurrency positions were forced to liquidate on September 22, highlighting the fragility of the cryptocurrency market. The forced liquidation process lacked a clear trigger, and option prices suggest increased volatility ahead.

In its latest outlook report, the OECD raised its global growth forecast for this year to 3.2%, noting that the economy was "more resilient than expected" in the first half of the year. While the global economy is expected to grow better than previously forecast this year as it absorbs the impact of U.S. President Trump's tariffs, the full impact of the tariffs remains uncertain.

Stephen Miran, newly appointed Federal Reserve Governor by President Trump, has advocated for a significant interest rate cut. He added, "I believe the appropriate federal funds rate should be in the mid-2% range, nearly two percentage points below the current policy level. If short-term interest rates remain persistently high around two percentage points, it could lead to unnecessary layoffs and higher unemployment."

US lifted up the ban of MQ-9 drone which carried out famous beheading incidents. This means all other countries can use this drone for beheading attack.

THE INFINITE MONEY GLITCH



The "Infinite Money Glitch" Diagram: What's Really Happening

From GROK of X.AI

The diagram you shared (which has gone viral as a meme on platforms like X, Reddit, and Instagram) humorously depicts a self-reinforcing "infinite money glitch" among OpenAI, Oracle (ORCL), and NVIDIA (NVDA). It illustrates a triangular cycle of \$100 billion investments: OpenAI → Oracle → NVIDIA → back to OpenAI. This is an exaggerated, satirical take on recent real-world announcements forming a symbiotic AI infrastructure ecosystem—often called a "flywheel" rather than a literal glitch. It's not a closed-loop money printer (no direct \$100B cash transfers in that exact sequence), but it highlights how these companies are interlocking to dominate AI compute, data centers, and training at massive scale. The meme taps into hype around AI's trillion-dollar capex boom, with critics joking it's a "house of cards" for billionaires like Sam Altman (OpenAI), Larry Ellison (Oracle), and Jensen Huang (NVIDIA).

Here's the breakdown of the actual deals fueling this narrative, based on announcements from June to September 2025:

- **OpenAI-Oracle Partnership (June/July 2025, Fully Revealed Sep 10):** In late June 2025, OpenAI and Oracle quietly signed an initial agreement for Oracle Cloud Infrastructure (OCI) to provide massive AI data center capacity as part of OpenAI's "Stargate" project—a U.S.-based supercluster for training next-gen models like GPT-5+. The full scope was disclosed on September 10: a **\$300 billion, five-year contract** (starting 2027) for Oracle to build and operate **4.5 gigawatts (GW)** of dedicated compute capacity. This is one of the largest tech deals ever, emphasizing "power-first" infrastructure (e.g., nuclear/renewable energy tie-ins). OpenAI gets exclusive access to this capacity for AI training/inference, reducing reliance on Microsoft Azure. Oracle benefits from long-term revenue visibility, as OpenAI commits to renting the full output—potentially \$60B/year at scale.
- **Oracle-NVIDIA Implied Flow (Tied to the Above):** No direct "\$100B investment" from Oracle to NVIDIA was announced, but the deal requires Oracle to procure **tens of billions in NVIDIA GPUs** (e.g., Blackwell/Hopper chips) to fulfill the compute needs. Estimates suggest Oracle could spend \$40–\$100B on NVIDIA hardware over the contract term, as OCI integrates NVIDIA's full-stack AI systems (chips + CUDA software). This isn't "investment" cash but procurement—Oracle buys from NVIDIA, boosting NVDA's sales pipeline amid global chip shortages.
- **NVIDIA-OpenAI Partnership (Announced Sep 22):** Yesterday (Sep 22, 2025), NVIDIA revealed a **strategic partnership** to deploy **at least 10 GW** of AI data centers powered by millions of NVIDIA GPUs (e.g., GB200 systems). To support this, NVIDIA plans to **invest up to \$100 billion progressively in OpenAI**, starting with \$10B for the first GW (expected online in 2026). This funds OpenAI's equity/debt for buildout, tying into Stargate. It's not a gift—NVIDIA gets guaranteed orders (OpenAI must use NVIDIA tech), locking in dominance. CEO Jensen Huang called it the "biggest AI infrastructure project in history," complementing OpenAI's Oracle deal for redundancy.

The "Glitch" in Action: This creates a virtuous cycle (or meme-worthy loop):

- OpenAI's \$300B commitment floods Oracle with backlog → Oracle buys NVIDIA GPUs → NVIDIA reinvests \$100B in OpenAI's expansion. It's "infinite" in the sense of scaling: Each GW deployed generates revenue that funds more GWs, potentially hitting \$1T+ in total AI infra spend by 2030. Risks include funding gaps (OpenAI needs IPOs/VCs to pay Oracle) and execution (delays in power/chips). Supporters see it as efficient U.S.-centric AI leadership; skeptics call it vaporware, as much capacity is hypothetical and unfunded.

Oracle Stock Movements: Why the Selective Reactions?

From GROK of X.AI

Oracle's stock (ORCL) has surged ~80–90% YTD in 2025, hitting a \$900B+ market cap, driven by AI tailwinds. But reactions to news have been uneven—here's why for the events you mentioned:

- **Sep 10 Gap Up (Despite "Not Ideal" Earnings):** ORCL gapped +36% (best day since 1992, adding \$244B in value), closing near \$300/share. Earnings showed Q1 revenue up 7% YoY to \$14.1B (beat estimates) but EPS missed slightly at \$1.30. The real catalyst? The **\$300B OpenAI deal revelation**, which exploded Oracle's cloud infrastructure backlog to \$98B (up 48% YoY, with AI contracts now 50%+ of pipeline). Investors ignored softer legacy software growth, repricing ORCL as an "AI pure-play" with 30%+ cloud ARR growth guidance. It was a "structural shift" moment—Wall Street was surprised by the deal's scale, previously rumored as "multi-GW" without dollar figures.
- **Sep 22 TikTok News (No Special Response):** On Sep 22, the Trump administration announced a preliminary deal for TikTok's U.S. operations: A joint venture (JV) led by Oracle, Silver Lake, and a16z to buy ~50% stake for \$50–\$60B, with Oracle overseeing algorithm security and recreating a U.S.-version (to address data privacy concerns). ORCL dipped -1.7% that day, with minimal volume spike. Why no pop?
 - **Overshadowed by NVIDIA-OpenAI Hype:** The \$100B NVDA deal dominated headlines, lifting NVDA +4% and the chip sector, while ORCL was already up 80% YTD—margins for error thinned.
 - **Perceived as "Defensive/Regulatory":** TikTok adds data center synergies (e.g., OCI hosting U.S. algo) but ~\$5–10B revenue potential vs. OpenAI's \$300B. It's more a geopolitical win (e.g., blocking full ByteDance control) than growth catalyst, with risks like China approval delays.
 - **Valuation Fatigue:** At 35x forward P/E, investors are picky—AI infra is the story, not social media side quests.
- **June Contract (No Gap Up):** The initial OpenAI-Oracle pact (announced ~June 30) was vague—focused on "expanding OCI for Stargate" without \$ figures or timelines. ORCL rose ~3.4% to an all-time high (~\$302) on vague buzz, but no gap because:
 - **Lack of Specificity:** Markets need numbers; June was "intent" vs. Sep's binding \$300B commitment.
 - **Pre-Earnings Context:** June fell amid broader tech rotation (e.g., away from cloud giants); full impact waited for Q1 results.
 - **Build-Up Effect:** Early leaks built anticipation, so Sep's reveal was the "eureka" moment.

In short: Markets reward concrete, massive AI catalysts (Sep 10) over prelims (June) or adjacent news (TikTok). ORCL's run reflects AI repricing, but volatility looms if funding/delays hit.

Competitors in the "Triangle" Ecosystem

From GROK of X.AI

This OpenAI-Oracle-NVIDIA alliance targets the **AI stack**: Models (OpenAI) + Cloud/Infra (Oracle) + Chips/Software (NVIDIA). It's a U.S.-focused powerhouse for training/inference at exascale, but faces rivals in each layer and integrated stacks. Key threats:

Competitor Stack	Key Players	Strengths vs. Triangle	Weaknesses	Market Share Threat	
Microsoft-Azure-OpenAI (Evolving)	Microsoft (Azure), OpenAI (partial), AMD (chips)	Massive \$13B+ prior OpenAI investment; Azure's 25% cloud lead; integrates Anthropic/Mistral for diversity.	Losing exclusivity to OpenAI; slower custom silicon vs. NVIDIA.	High—still OpenAI's #1 partner, but triangle diversifies away.	
AWS-Anthropic-AMD/Broadcom	Amazon (AWS), Anthropic (Claude), AMD (MI300 chips)	AWS's 31% cloud dominance; cheaper AMD GPUs (70% NVIDIA perf at 40% cost); Anthropic's enterprise focus.	Weaker ecosystem (ROCm lags CUDA); less hype than GPT.	Medium-High—cost edge erodes NVIDIA premiums; AWS poaches hyperscalers.	
Google Cloud-Gemini-TPUs	Google (GCP), xAI/Gemini, Broadcom/TPU custom chips	In-house TPUs (cheaper long-term); Gemini's multimodal edge; \$75B 2025 capex.	Slower adoption (GCP 11% share); internal AI silos.	Medium—strong in search/enterprise, but trails in open models.	
China-Centric (Huawei/SMIC)	Huawei (Ascend), Alibaba (Hanguang), ByteDance	Domestic chips evade U.S. sanctions; integrated with TikTok/Douyin data.	Export bans limit global reach; 20–30% perf gap to NVIDIA.	Low (U.S. market)—geopolitical firewall, but TikTok JV dilutes.	

Overall Risks: Antitrust scrutiny (e.g., NVIDIA's 90% AI chip monopoly); open-source alternatives (e.g., Meta's Llama eroding proprietary moats); and execution (power shortages delaying GW-scale builds). The triangle's edge? Scale and integration—10+ GW could train models 10x faster—but it's a bubble if AI ROI disappoints.

You're tapping into one of the most fascinating financial feedback loops in tech history—what some are calling the **"Infinite Money Glitch"** 🌀. Let's break it down:

The \$100B Triangle: OpenAI ↔ Oracle ↔ NVIDIA

This triangle represents **mutual strategic entanglement**, not just investment:

1. OpenAI → Oracle (\$300B contract, \$100B upfront)

- In **June 2025**, OpenAI signed a **\$300B cloud infrastructure contract** with Oracle to build AI data centers under the *Stargate Initiative*.
- Oracle receives **\$100B upfront** to begin deploying compute infrastructure for OpenAI's next-gen models.

2. Oracle → NVIDIA (\$100B investment)

- Oracle channels part of that capital into **NVIDIA hardware**, since 70%+ of AI data center costs are GPU-related.
- Oracle also gains equity exposure to NVIDIA's AI roadmap.

3. NVIDIA → OpenAI (\$100B investment)

- On **Sep 22, 2025**, NVIDIA announced a **\$100B investment** in OpenAI to deploy **10 gigawatts of AI compute** using its Vera Rubin platform.
- This ensures OpenAI remains a top customer and locks in future GPU demand.

What's really happening?

It's a **circular capital deployment**:

- OpenAI funds Oracle → Oracle buys NVIDIA → NVIDIA funds OpenAI.
- Each company benefits from the other's growth, creating a **self-reinforcing loop** of valuation and infrastructure expansion.

From Copilot of Microsoft



Why Did Oracle Jump on Sep 10?

Despite **underwhelming earnings**, Oracle stock surged because of:

- **Forward guidance:** Oracle projected **\$114B in cloud revenue by FY2029**, a 14x increase.
- **AI optimism:** Investors focused on Oracle's role in the Stargate project and its GPU cloud buildout.
- **Momentum:** Oracle had a 26% five-day rally, driven by AI infrastructure hype.



Why No Jump on Sep 22 (TikTok News)?

Oracle's muted response to the TikTok acquisition news is due to:

- **Already priced in:** Oracle has been managing TikTok's U.S. data since 2022 via *Project Texas*. The acquisition was expected.
- **Political uncertainty:** The deal still faces scrutiny over ByteDance's algorithm control.
- **Market fatigue:** After a massive rally earlier in the month, investors may be waiting for concrete execution details.



Why No Jump in June (OpenAI Contract)?

- **Delayed recognition:** The \$300B contract was long-term (2027 start), so immediate revenue impact was unclear.
- **Skepticism:** Analysts questioned OpenAI's ability to fund such a massive deal amid high burn rates.
- **No formal announcement:** The June deal was signed quietly, with details emerging later.

Competitors to the Triangle

This triangle faces **intense competition** across multiple fronts:

Sector	Competitors	Threat Level
AI Models	Google DeepMind, Anthropic, Meta	High (model innovation)
Cloud Infra	AWS, Microsoft Azure, CoreWeave	High (GPU access, scale)
Chips	AMD, Intel, Huawei, Alibaba	Medium–High (custom silicon)
Data Centers	Meta, Tesla, Nebius Group	Medium (global expansion)
AI Services	Perplexity AI, Palantir, Scale AI	Medium (vertical integration)

Notable Threats:

- **China’s chip independence:** Huawei’s Ascend 920 and Alibaba’s PPU challenge NVIDIA’s dominance.
- **Anthropic + Amazon:** Competing directly with OpenAI via Claude models and AWS infrastructure.
- **CoreWeave:** A neo-cloud rival to Oracle, backed by NVIDIA but offering more flexible AI compute.

From Copilot of Microsoft



World Observation

Day 1309
Russia/Ukraine Conflict

Riding the AI Waves

(26) Battle of AI

What is Warren buffet famous for? Besides always can earn 3000% or 4000% in a single stock, he is famous for buying at low, and that's why he can earn so much. But this time, there is an exception. He bought TSM at record high but news was kept secret. In Q3 2022 he purchased TSM 60.1 million shares, but sold in Q1 2023 and now what is he doing? He sold BYDDY, looked bad on Chinese economy and bought TSM, looked good on Taiwan economy. Why he dares to buy at record high that few people would do? Because another battle of AI already started, no matter domestically or in overseas.

There is a triangle of Infinite Money Glitch among OpenAI, ORCL and NVDA. These 3 are surely one of the hottest topics of the market recently.

The battle on AI has already started. Why we have to study and DYOR (Do Your Own Research) in this triangle. The answer is on the last sentence of page 7. *Each company benefits from others growth.* Anyway, they united together to face the keen competition outside. Who is the greatest beneficiary? It is outside the triangle. That is TSMC.

What is the greatest barrier of their success? Not competitors from China like Alibaba or Huawei, their threats are quite limited, will explain in the next few days. It is of the following:

A [new presidential proclamation has imposed](#) a mandatory \$100,000 fee on most new H-1B cases tied to workers outside the country, effective 12:01 a.m. EDT on September 21, 2025.

Why US can develop atomic bomb earlier than Germany? It is because all talented people are concentrated to US.

Why US can defeat Soviet Union in Space Race and landed on Moon first? It is because all talented people are concentrated to US.

Why the Landing On Mars US can be earlier than China? It is because all talented people are concentrated to US.

Why Wall Street and Silicon Valley on exist in US and other countries cannot reproduce? It is because all talented people are concentrated to US.

Why the 100 topmost university, over half are in US? It is because all talented people are concentrated to US.

So, what points we have to mind? In short term is the union of the triangle which is facing new competition, and for other companies that need to survive, should form similar unions.

In medium term is the battle on AI will be more furious, therefore there is no need to worry about bubble economy, if Warren Buffet dare to buy on record high, that means a new page has been turn on, or even a new chapter and not just a page has been turned on. So just like the sudden test of rotation direction of Milky Way, no matter what you answer will be correct. If the market keeps on rising, no matter at what level you buy, you can win. If you do not buy cannot win.

In the long run, immigration policy is over all others. It must be well controlled but not banning talented people to come in or else the current system will collapse.