

# US Stock Express

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## New Robo-Taxi from Google



Waymo  
From GOOG



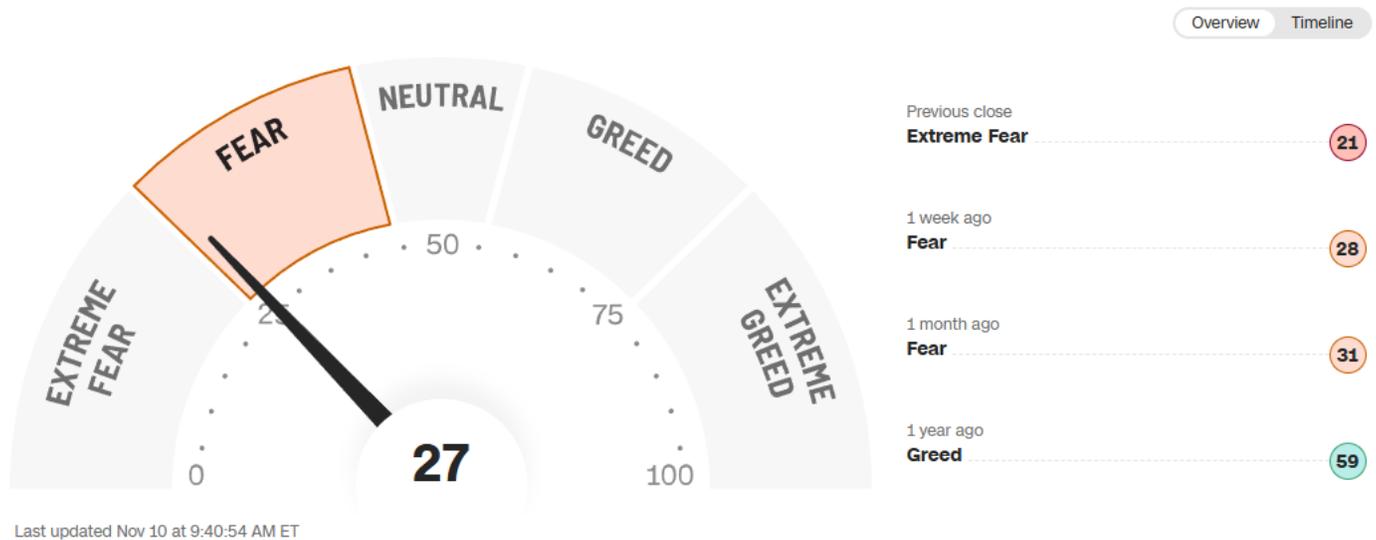
Zoox  
From AMZN

*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.*

## Fear & Greed Index

What emotion is driving the market now?

[Learn more about the index](#)



## North East West South is NEWS

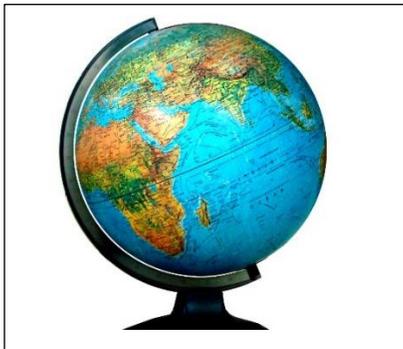
In the race for dominance in artificial intelligence (AI), US tech giants possess the capital and chips, but their ambitions are encountering a new obstacle: power supply.

Microsoft CEO Satya Nadella recently admitted in a podcast with OpenAI CEO Sam Altman, "The biggest problem we face now is no longer an overabundance of computing resources, but electricity—and the ability to quickly deploy the infrastructure where there is electricity."

Apple is preparing a major upgrade to its smart home platform, planning to launch its own designed smart home hub in March or April 2026, coupled with a completely revamped Siri voice assistant, hoping to counter the increasingly powerful AI-driven solutions from Google and Amazon.

Blue Origin, the space company founded by billionaire Jeff Bezos, was forced to postpone its highly anticipated New Glenn rocket launch today due to unfavorable weather conditions.

U.S. Defense Secretary Pete Hegseth posted on social media today that the U.S. military struck two drug-smuggling ships in the Eastern Pacific, killing six drug traffickers.



## World Observation

Day 1357  
Russia/Ukraine Conflict

# Riding the AI Waves

## (41) TSLA Flying cars & Robotaxi

The development of Full Self Driving of TSLA is now in 2 lines, one line is in robotaxi service and another is in e-car selling. Anyway, TSLA caught attention more than their competitors.

Since Petroleum crisis of 1973, a lot of people or academic institution has developed various kinds of e-cars but not so popular, all were in prototype only. It is TSLA that brings the trend to society and thus become the most popular format of cars. Now TSLA is going to develop robotaxi, but they are again not the first one. Experienced investors should remember in California, there were 2 brands of robotaxi running, which were Cruise of GM and Waymo of GOOG.

GM's robotaxi service (Cruise) in California was halted in late October 2023, when the California Department of Motor Vehicles revoked its permits following safety concerns. Shortly afterward, GM suspended all driverless operations nationwide. Therefore, now is only GOOG and TSLA are running. But no matter what happens, other brands cannot catch so much attention as that of TSLA. Now people have great hope on the version 14.2 of Full Self Driving.

Practically, people do not care what the number of version it is, what they care most is when will the non-monitor self-driving come into mass production for commercial usage. It will be a great impact to the society. For what it claims is that it is 10 times safer than human driving. Of course, workers unions are in objection that this will bring about unemployment of current drivers, but when they take out the fact of 10 times safety, it is quite hard to prevent it. Or everyone must try to make it come true earlier so as to save more lives.

Another is e-car selling, when with Full Self Driving, it would have the best-selling points. That is people on the car no need to use drivers, and can save more time to do other things such as stock analysis of the market when on the way to daily work and in long distance travelling the use will be more prominent, it can be used for different entertainment or writing poems or songs or art creation. And when in mass transportation like bus or coach, a driverless coach would lower the cost greatly and the fare should be greatly lowered. Anyway, a new page of numerous points to say.

So, for flying cars no matter for Model A of 2-seater or 1-seater of VTOL (vertical take-off & Landing) are still in prototype stage, price and growth is so uncertain. But one thing is certain, what they need is a license similar to a pilot, that is not everyone can get. Even the current 2-dimension Full Self Driving must change to 3-dimension, and it will take 10 to 15 years. The greatest problem is certification, that is both the manufacturer and the driver must get a special certificate first.

The launch of flying car is to avoid traffic jam on the land, but if the price is really as cheap as US\$6789, it is very attractive indeed, it may lead to new traffic jam in the air. Too many people will buy such a car. What is Elon Much strong for? One of his biggest abilities is to lower the cost by mass production, no matter in reusable rockets or e-car, he is really a superman in mass production. He can lower the cost also 10 times, and keep up the safety also 10 times. With the help of AI, he surely can finish these two kinds of 10 times easily.

The future of TSLA is not just a e-car company, it will be a combination of TSM, GOOG, TSLA, NVDA, AMD and .....etc. Please refer to The Express of 20251110, 20251027, 20250923, 20250922, 20250918, 20250917, 20250916, 20250908, 20250827.

One more thing, we have to view things from another side, what is the greatest weak point of this superman, he admitted he himself is always too optimistic. So, for the schedule he expected, we should normally put a delay of one or two quarters at least, less will be disappointed. Such as Landing on Mars, no need to expect to land on in 2029, better put it in 2030.



## Waymo and Zoox service starts in San Francisco and Los Angeles

Company	City	Public service status	Earliest public operations noted	Notes
Waymo	San Francisco	Operating	Service expanded across SF Peninsula Aug 6, 2024	Round-the-clock public ride-hailing, continued expansions in 2025 <a href="#">1</a> <a href="#">2</a>
Waymo	Los Angeles	Operating	Broad commercial expansion announced June 17, 2025	Coverage grew past 120+ sq mi; continued expansion through 2025 <a href="#">2</a> <a href="#">3</a>
Zoox	San Francisco Bay Area	Testing, preparing for public	Preparing for first robotaxi launch later in 2025	Operating test fleet; pod-like robotaxi without steering wheel planned for rides <a href="#">4</a>
Zoox	Los Angeles	Mapping and supervised testing	Entered LA with retrofitted test vehicles Apr 8, 2025	Data collection with safety drivers ahead of autonomous testing <a href="#">5</a>

## Why Tesla draws more attention than Waymo and Zoox

- Narrative and brand:** Tesla's consumer brand, direct-to-customer software updates, and Elon Musk's high-visibility announcements create outsized attention compared with B2B-oriented messaging from Waymo and Zoox. Recent coverage highlights Tesla's "robotaxi" as a strategic pivot to reignite growth, making it a market storyline beyond pure tech milestones. [6](#) [7](#)
- Consumer ownership angle:** Tesla positions robotaxi through the existing owner fleet and vision-only AI claims with potentially low per-mile costs, which feels accessible and scalable to retail investors and Tesla drivers, versus geofenced, safety-case-heavy deployments from Waymo and Zoox. [7](#)
- Timing and expectations:** Media and investor pieces in 2025 frame Tesla's pilot invitations and planned launches as impending paradigm shifts, even while noting regulatory hurdles—this mix of ambition and near-term pilots sustains hype cycles. [6](#) [8](#)



## Tesla robotaxi development and importance

- **Strategic shift:** Analyses in 2025 describe Tesla moving beyond car sales toward autonomous ride-hailing, aiming to cover large portions of the U.S. population, with pilots like Austin mentioned. The move is pitched as tapping a massive mobility market and reshaping Tesla's valuation mix, though the practical path includes notable regulatory and operational hurdles. [6](#) [7](#) [8](#)
- **Economic thesis:** Commentators estimate low operating costs per mile for AI-driven robotaxis and substantial long-term revenue potential, contingent on safety performance, broad regulatory approvals, and fleet reliability at scale. [7](#)
- **Regulatory reality:** Even enthusiastic coverage acknowledges delays and state-by-state approvals as gating factors; California is consistently cited as a challenging market for fully driverless consumer services. [6](#)

## On "FSD v14.2" and the claim of being 10× safer than human drivers

- **Software milestone:** Public posts in Oct 2025 indicate FSD v14.2 is targeted for wide rollout following positive early feedback on 14.1.2's driving hesitations. That's a significant software step, but "wider release" is not the same as "no human oversight"—regulatory frameworks still govern safety drivers and operational design domains. [9](#) [10](#) [11](#)
- **Safety claims:** The specific "10× safer than human drivers" figure is frequently discussed by enthusiasts, but definitive independent validation is not established in these sources. Real-world safety requires standardized reporting and regulator-accepted metrics; rollout pace depends on demonstrated performance and incident-free operations. [6](#)

## Flying cars: reality versus the images and rumored prices

- **What's real today:** Alef Aeronautics' Model A, sometimes associated with Musk's interest, has shown test flights and targets deliveries starting 2025, with an announced price roughly \$300,000. FAA special airworthiness and a two-seat VTOL design have been reported in regional coverage [12](#). Musk has teased a prototype reveal, but details, specs, and timelines remain vague. [13](#)
- **The \$6,789 claim:** A one-seat "Tesla flying car" at \$6,789 is not supported by credible sources. Current eVTOLs and "flying car" prototypes are expensive due to propulsion, battery density, safety redundancies, certification, and manufacturing complexity; sub-\$10k pricing is inconsistent with the state of the art. [12](#) [13](#)
- **Commercialization timeline:** Industry coverage highlights companies like Joby and Archer aiming for early commercial operations around 2025, with broader market growth trailing certification and infrastructure. Adoption depends on airspace integration, vertiports, noise constraints, and insurance—none of which move as fast as hype suggests. [14](#) [15](#)



## Autonomy in 3D, licensing, and air traffic implications

### Training autonomy from 2D to 3D

- **Complexity leap:** 3D autonomy adds vertical dynamics, wind, energy constraints, and collision avoidance in fully three-dimensional corridors; training spans simulation, flight testing, and safety case validation. Education programs emphasize quadrotor dynamics, controls, estimation, and 3D motion planning—illustrating the talent and time investment required before broad deployment. [16](#) [17](#) [18](#)
- **Timeline to “10× safer”:** There is no reliable public estimate for achieving “10× safer” in 3D flight. Aviation regulators demand rigorous certification; proving statistical safety in the national airspace system typically requires years of flight hours, incident reporting, and standardization—longer than road autonomy because the consequence and regulatory bar are higher. [15](#)

### Human operators and licensing

- **Licensing models:** Some coverage suggests specialized pilot certifications tailored to hybrid vehicles, aligning with aviation rules plus state road requirements [19](#). Other demonstrations report test operations of certain ultralight-style eVTOLs after structured training without a traditional pilot license, which depends on vehicle category and local regulations [20](#). Expect jurisdiction-specific pathways: medical checks, supervised training, and type-rated endorsements are likely for most practical, passenger-carrying systems. [21](#)

### Will cheap flying cars cause “air traffic jams”?

- **Airspace management:** Even with adoption, flows will be controlled via corridors, altitude stratification, and traffic management systems. Studies and industry commentary note that flying cars could reduce ground congestion via direct routing but may introduce new aerial bottlenecks around vertiports and popular corridors. Without robust UAM traffic management, localized sky congestion is plausible. [14](#)  
[15](#) [22](#)

## Investor takeaways

- **Robotaxi race:** Waymo is already operating in SF and LA with expanding service areas; Zoox is mapping and testing toward public rides. Tesla’s robotaxi narrative is financially significant but hinges on regulatory greenlights, validated safety, and service reliability across cities—not just software releases. [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#)
- **Flying cars:** Near-term commercialization will be limited, premium, and route-constrained. Credible price points are in the six figures today; mass-market prices under \$10,000 would require breakthroughs in batteries, materials, certification, and manufacturing that are not currently evidenced. [12](#) [14](#) [15](#)
- **Risk and timing:** Expect measured rollouts, regulatory friction, and infrastructure build-outs. For both robotaxis and flying cars, durable value will come from real utilization, safety records, and unit economics—not announcements alone. [6](#) [7](#) [15](#)

If you want, tell me the specific city you care about most (SF, LA, Austin, Phoenix), and I’ll map realistic timelines and catalysts there.

## Tesla's Full Self-Driving (FSD) Progress and Robotaxi Development

Tesla's FSD software has been advancing rapidly, with version 14 representing a major leap in end-to-end neural network architecture for autonomous driving. Based on recent updates, FSD 14.2 is slated for a wide release to Hardware 4 (HW4) vehicles by late October or early November 2025, following employee testing of earlier 14.x builds. Elon Musk has indicated that 14.2 will be the version pushed to the broader fleet, with subsequent iterations like 14.3 following weeks later. However, the transition to fully unsupervised operation—removing safety drivers and eliminating the need for human monitoring—is not tied directly to 14.2 in public announcements. Tesla aims for unsupervised FSD in select areas by mid-2026, starting with robotaxi services, though regulatory approvals and real-world validation could push this timeline. [teslarati.com](#) [+4 more](#)

Development is indeed splitting into two tracks:

- **Robotaxi service:** Tesla unveiled the Cybercab (a two-seater autonomous vehicle) and Robovan (a larger shuttle) in October 2024, with production targeted for 2026–2027. Initial testing and limited deployments could begin in Texas and California as early as mid-2025, expanding to 8–10 U.S. metro areas by year-end 2025. This leverages FSD's vision-only system (no lidar or radar), relying on cameras and AI trained on billions of miles of fleet data. [businessinsider.com](#)
- **Consumer e-cars:** FSD will continue rolling out to personal vehicles like Model 3/Y/S/X, enabling features like Actually Smart Summon and unsupervised highway driving. By 2026, Tesla expects FSD to handle most urban scenarios without intervention.

Tesla's robotaxi push is hugely important for several reasons:

- **Economic impact:** Analysts project it could add trillions to Tesla's valuation by creating a ride-hailing network where owners earn passive income by lending vehicles. Unlike traditional EVs, this shifts Tesla from a carmaker to a mobility-as-a-service giant, potentially rivaling Uber but with lower costs (no human drivers). [forbes.com](#)
- **Technological edge:** Tesla's approach uses general-purpose AI (trained on real-world data) rather than hand-coded rules or expensive sensors like Waymo's lidar arrays. If successful, it scales faster and cheaper, democratizing autonomy. [reuters.com](#)
- **Market disruption:** It could reduce urban congestion, lower transportation costs (rides as cheap as \$0.20/mile), and reshape industries like insurance, parking, and public transit.

Regarding safety, Tesla's Q3 2025 Vehicle Safety Report shows Autopilot (a subset of FSD) involved in one crash per 7.4 million miles, about 9 times safer than the U.S. human average (one per 670,000 miles). Musk has claimed FSD Supervised could reach 10x safer than humans by mid-2026, based on metrics like miles per intervention or accident. This is extrapolated from internal data showing FSD handling complex scenarios better than humans in fatigue-prone or distracted conditions. If achieved, it transforms the world by: [teslarati.com](#) [+3 more](#)

- Slashing road deaths (over 40,000 annually in the U.S. alone) through always-alert AI.
- Enabling 24/7 mobility for the elderly, disabled, or non-drivers.
- Reducing emissions via optimized routing and shared fleets.
- Freeing up human time (commutes become productive) and urban space (fewer parked cars).
- Overhauling economies: Job losses in driving sectors, but gains in AI, energy, and logistics.

### Comparison with Waymo and Zoox: Launches and Attention

Waymo (Alphabet/Google) and Zoox (Amazon) have indeed launched ahead of Tesla in driverless operations:

- **Waymo:** Fully driverless rides began in Phoenix in 2020 (limited), but public expansion hit San Francisco in June 2024 (open to all, no waitlist) and Los Angeles in November 2024 (also open to all). By March 2025, it was handling 200,000 paid rides weekly across markets. [waymo.com](#) [+3 more](#)
- **Zoox:** Public driverless service launched in Las Vegas on September 10, 2025 (free initially, expanding soon). In San Francisco, it started a limited early rider program in October 2025, with full public access targeted for 2026. No LA launch yet, but expansion to Austin and Miami is planned. [cnbc.com](#) [+3 more](#)

These received less hype than Tesla's announcements because:

- **Media and personality factor:** Elon Musk's massive social media presence (over 200M followers on X) and bold predictions generate viral buzz. Tesla's events, like the 2024 Cybercab unveiling, are spectacle-driven, tying into stock performance and investor excitement. [carboncredits.com](#)
- **Scale and ambition:** Waymo/Zoox focus on cautious, geo-fenced rollouts in a few cities with custom vehicles and heavy sensor suites. Tesla promises global scale using existing cars, which feels more revolutionary and accessible.
- **Market narrative:** Tesla's robotaxi is pitched as a "trillion-dollar opportunity," boosting TSLA stock. Waymo/Zoox are subsidiaries of tech giants, so launches don't move markets as dramatically. Still, Waymo leads in real-world miles (over 20M driverless by 2025), showing proven tech but slower hype. [reuters.com](#)

Tesla's upcoming robotaxi (likely 2026 launch) feels "greater news" due to this amplification, plus its potential to integrate with personal EVs for a hybrid ownership model.



Upper line is TSLA, lower lines is NASDAQ

## Tesla and Flying Cars: Reality Check and Future Development

The attached images appear to be conceptual or AI-generated renders, not official Tesla products. The first shows Elon Musk in a blue, pod-like "Tesla" vehicle hovering in a forest, priced at \$6,789 (a meme-ish number often used for humor). The second depicts a black, wheel-equipped flying car hovering above an SUV in a field. These resemble fan concepts or viral mocks, possibly inspired by eVTOL designs, but Tesla has no confirmed flying car program. Musk has occasionally teased "crazy" ideas like Roadster thrusters, but recent hints (e.g., a prototype by end-2025) seem speculative or podcast banter, not formal announcements. [youtube.com](#) [+3 more](#)

The "Model A" you mentioned aligns more with Alef Aeronautics' flying car: A two-seater eVTOL priced around \$300,000 (not \$30,000), with deliveries eyed for late 2025-2026. No \$6,789 one-seater from Tesla exists; that's likely fictional. [alef.aero](#) [electrek.co](#)

Broader flying car (eVTOL) development:

- **Timeline:** Certification for models like Joby Aviation's (partnered with Toyota) or Archer's could hit by late 2025, with commercial ops in 2026-2028 in cities like LA, NYC, and Dubai. Full urban air mobility (UAM) networks might scale by 2030, worth \$1.5T by 2040. [flyingcarsmarket.com](#) [+2 more](#)
- **Autonomy (FSD-like):** Most start piloted, but autonomous versions are in R&D. Transitioning from 2D (ground) to 3D (air) involves new training data for obstacles, weather, and airspace. It could take 3-5 years post-ground AV maturity, using sims and drone tech. Companies like Wisk (Boeing) aim for fully autonomous eVTOL by 2030. Reaching 10x safer than human pilots might take 5-10 years, given aviation's strict regs (e.g., FAA requires near-zero failure rates). [sciencedirect.com](#)
- **Human drivers:** Operators need a pilot's license, often a sport or private one (easier than commercial jets, but harder than a car license—requires flight hours, medicals, and exams). For eVTOLs, simplified controls could lower barriers, like a "type rating" in 20-40 hours.
- **Commercial use:** Investors eye 2026 for initial paid flights (e.g., Joby in NYC). Mass adoption by 2030 if batteries improve (range now 50-150 miles).
- **\$6,789 price and air jams:** That's unrealistically low (current prototypes cost \$1M+; mass production might hit \$100k by 2030). If affordable, yes—it could cause "sky congestion," requiring advanced air traffic management (e.g., NASA's UAM systems) to prevent jams. Early regs will limit to corridors, but long-term, it enables point-to-point travel, easing ground traffic while risking noise/pollution issues. [aviationweek.com](#) [+2 more](#)