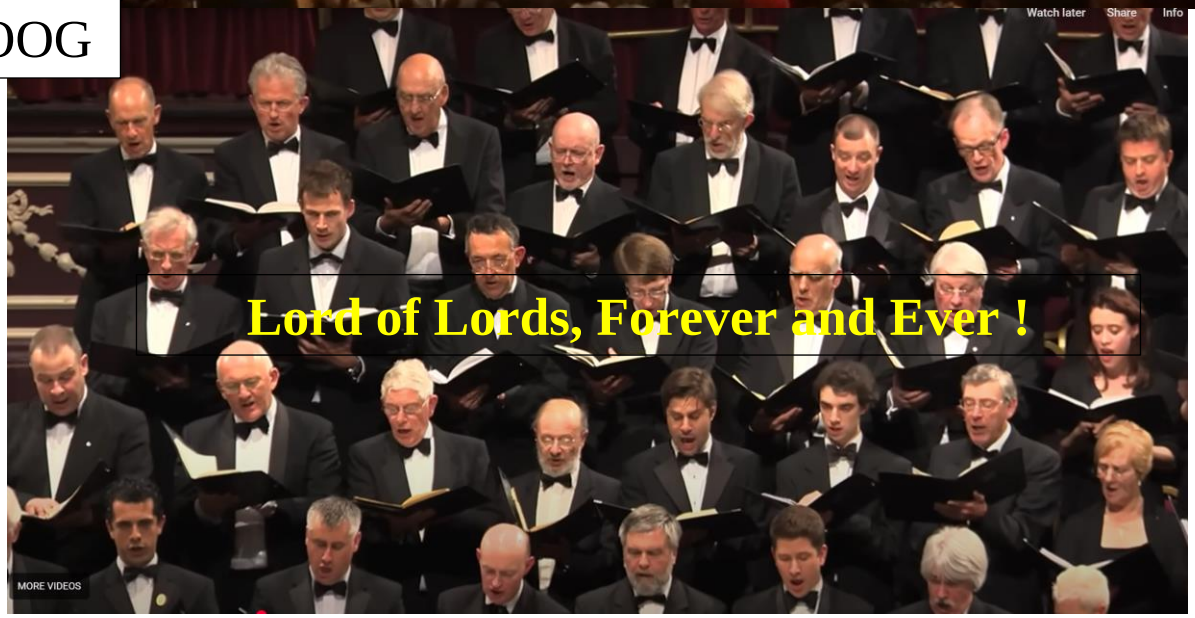
US Stock Express

Daniel Yue

Email: info@ihandbook.org www.ihandbook.org

NVDA

GOOG



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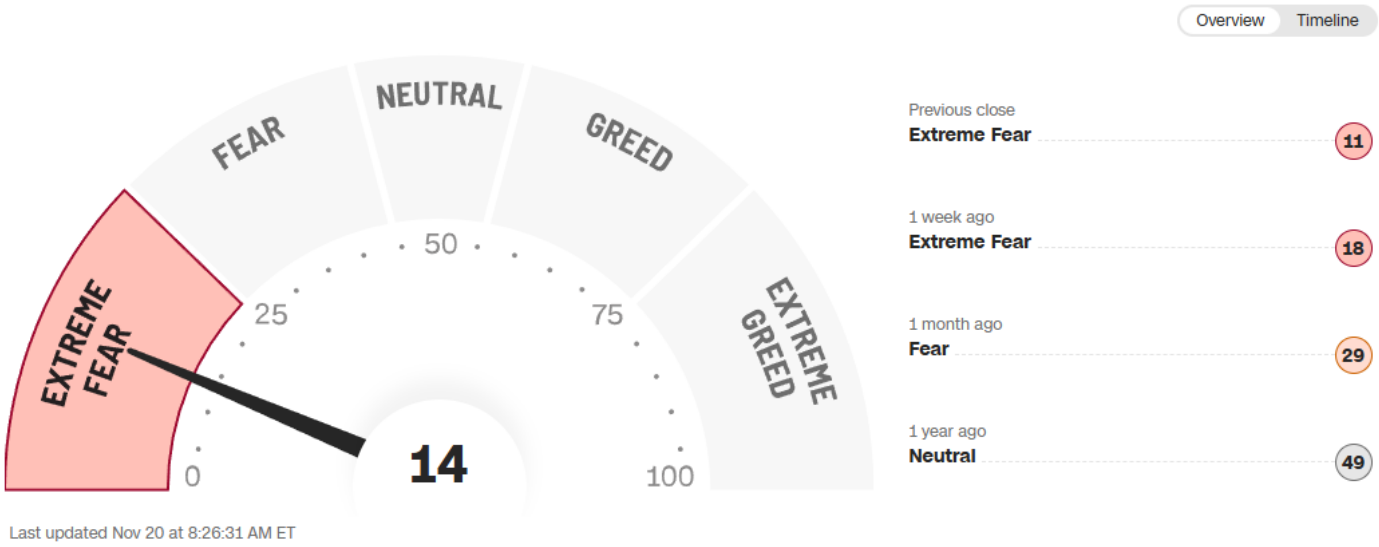
Never trade with money that has a deadline for withdrawal.
All suggestions are for reference only, even AI cannot be 100% reliable, final decision still lies upon investors.
Copy trading cannot replicate another trader's background or psychological state.

Fear & Greed Index

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



North East West South is *NEWS*

US President Trump announced that he has signed a bill requiring his administration to release documents related to the late sex offender Jeffrey Epstein.

EU High Representative for Foreign Affairs and Security Policy Kaja Kallas stated that any peace plan concerning Ukraine must involve Kyiv and Europe. The US recently proposed a new plan, but it appears to reiterate Russia's demands.

US Ambassador to Japan George Glass stated on Thursday that the US will firmly support Japan in any dispute with China. He expressed outrage at recent Chinese criticism of Japanese Prime Minister Sanae Takaichi.

Tesla CEO Elon Musk and Nvidia CEO Jensen Huang reached a high degree of consensus on the future of space-based AI, making a bold prediction: within the next five years, solar-powered space-based AI satellites will be the most economical and efficient form of AI computing on Earth.

Yann LeCun, chief AI researcher at tech giant Meta, confirmed today that he will be leaving Meta to start a new company to advance advanced machine intelligence. His former employer will become a partner in the new company.

World Observation

Day 1367
Russia/Ukraine Conflict

Kardashev Type II Civilization

Today, everyone is talking about the nice report of NVDA, there is no need for me to repeat. When every one is talking about the economic indicators like Non-Farm, Trade Deficit and Initial Claims, no points for me to repeat. We must look forward and farther than the market. That is put your concentration on *Kardashev Type II Civilization* (Space AI).

Please refer to The Express of 20250804. I have already pointed out that GOOG is the *Lord of Lords*, you can see that recently investors are worrying over the fall of the market, some afraid a long bear market is coming. The Fear & Greed Index on Tuesday was at 11 points, and Wednesday was 12 points but GOOG is at record high. Normally such a low point will make the market rebound in the next few weeks.

NVDA is the *King of Kings*, not just of the nice report, but of the "US-Saudi Investment Forum" in Washington. It was arranged by Donald Trump to be on the same day of financial result announcement of NVDA. The Crown Prince and Prime Minister Mohammed bin Salman promised to invest US$1 trillion and also a planned purchases of 600,000 Nvidia AI chips by HUMAIN, a government-backed Saudi AI firm.

Mind that Elon Musk of TSLA and Jensen Huang of NVDA also attended such a meeting and gave their speech on AI. Musk emphasized that the deployment of AI in space is an inevitable result for the continued advancement of human civilization. He pointed out that in

order to reach a higher level of "Kardashev Type II civilization," that is; to be able to utilize solar energy, humanity must venture into deep space and deploy solar-powered AI satellites.

From a chip technology perspective, Jensen Huang provided crucial engineering support for this vision of space AI. He pointed out that the space environment offers unparalleled heat dissipation advantages compared to Earth. Huang mentioned that in today's supercomputers, a rack weighing up to two tons may have as much as 1.95 tons dedicated to cooling. He humorously remarked that in space, it would be "just hung up," because space doesn't require water; heat dissipation through radiation would be sufficient to effectively cool the chips.

So, AI is developing, first stage is in internet like Chat GPT, SORA; second stage is going into real life like Full Self Driving and humanoid robot. The third stage is coming which is Space AI.

At first, I have special emphasis on Artemis Mars Landing project, the target year is 2030. Later on, because of the Pay and Performance Scheme of Elon Musk is a 10-year project so our target year should be 2035. Now because of Space AI, there is something beyond the above two projects, maybe they really want to Colonize Mars or the Moon. Or even some crazy projects. So, our stocks of Mars Landing should have a broader scope and wider eyesight, a lot of AI development can be merged into stage 2 and stage 3 of AI development. Besides monthly purchase of TSLA and NVDA, can buy ARKX, RTX, LMT, NOC, RKLB, BA, LUNR, UFO and DXYZ at low. Anyway, it proves AI is not a bubble, because it has incessantly development, even though sometimes it may be overestimated and lead a retreat. Anyway, market is not a linear scale. Inside the path, everything is ***Dust in the Wind***.

A Kardashev Type II civilization is one that can harness and utilize the entire energy output of its star. This represents a massive leap in technological advancement and energy control compared to our current capabilities.

🌌 Kardashev Scale Overview

The **Kardashev Scale**, proposed by Soviet astronomer Nikolai Kardashev in 1964, categorizes civilizations based on their energy consumption capabilities:

Type	Energy Source	Description
Type I	Planetary	Uses all energy available on its home planet
Type II	Stellar	Harnesses the full energy of its star
Type III	Galactic	Controls energy at the scale of an entire galaxy

Sources: [1] [2]

☀️ What Defines a Type II Civilization?

A Type II civilization would be capable of:

- **Capturing and storing solar energy on a massive scale**, possibly through megastructures like a **Dyson Sphere**—a hypothetical structure that surrounds a star to collect its energy output.
- **Manipulating stellar phenomena** such as solar flares or fusion processes for power.
- **Sustaining interplanetary or interstellar infrastructure**, including advanced space travel and colonization.

This level of energy control implies **technological mastery far beyond current human capabilities**, enabling feats like terraforming planets, powering massive AI systems, or even altering stellar environments.

🌍 Where Are We Now?

Human civilization is currently estimated to be around **Type 0.7** on the Kardashev Scale. We rely on a mix of fossil fuels, nuclear, and renewable energy sources, and we're only beginning to tap into solar power at scale. [2]

🚀 Why It Matters

The Kardashev Scale isn't just science fiction—it's a framework for:

- **Understanding the trajectory of technological progress**
- **Framing SETI (Search for Extraterrestrial Intelligence)** efforts by estimating what kinds of civilizations we might detect
- **Exploring long-term human potential** in space colonization and energy innovation

Would you like to explore what technologies could realistically push humanity toward Type II status—or how long that might take?

Trump's timing of the U.S.-Saudi Investment Forum on the same day as NVDA's earnings was almost certainly deliberate: it maximized visibility by aligning geopolitical capital flows with the tech sector's most-watched event. Musk and Huang's speeches framed space-based AI as the next frontier, suggesting that Tesla and NVIDIA could cooperate on orbital AI infrastructure projects of potentially trillion-dollar scale. For investors, this means watching for early signals of joint ventures, hardware deployments, and regulatory frameworks that could unlock new asset classes in "space AI."

🏛️ Why the Timing Matters

- **Trump's forum (Nov 19, 2025)** coincided with **NVIDIA's blockbuster earnings** [1]. Saudi Arabia pledged **$1 trillion in U.S. investments** [2] [3], amplifying the narrative of America as the hub of AI and energy innovation.
- By aligning the forum with NVDA's results, Trump ensured **maximum media coverage** and reinforced the message that U.S. tech and capital markets are inseparable from strategic alliances.

🚀 Musk's Vision: Solar-Powered AI in Space

Musk's plan rests on three pillars: [4] [5]

1. **Orbital AI Data Centers** – Satellites equipped with NVIDIA-grade GPUs, powered directly by solar arrays, bypassing Earth's atmospheric inefficiencies.
2. **Deep Space Deployment** – Positioning satellites beyond Earth orbit to capture uninterrupted solar radiation, scaling humanity toward **Kardashev Type II civilization**.
3. **Integration with SpaceX** – Starship launches provide the logistics backbone, while Tesla's AI (Dojo, Optimus robotics) supplies the intelligence layer.

Investor angle: Early opportunities lie in companies building **space-grade semiconductors, solar collection systems, and orbital infrastructure**. ETFs tracking aerospace + AI convergence could benefit.

❄️ Huang's Cooling Insight

- On Earth, **95% of supercomputer rack weight can be cooling systems**. In space, **radiative cooling** dominates: heat dissipates naturally into the vacuum without water or bulky chillers. [6] [7]
- This means **lighter, cheaper, and more efficient AI supercomputers** in orbit. The cost savings on cooling could be redirected into compute density, accelerating AI training.

Commentary: Huang's point is technically sound. Space offers a **thermodynamic advantage**—no convection, no atmosphere, just direct radiation into 3K cosmic background. This could make orbital AI clusters vastly more efficient than terrestrial ones.

🤝 Potential TSLA–NVDA Collaboration

- **Tesla's AI stack** (Dojo, robotics, autonomous systems) + **NVIDIA's hardware dominance** (H100, Blackwell GPUs) = natural synergy.
- Already, Huang delivered a **petaflop AI supercomputer to SpaceX** [6], signaling cooperation beyond Mars colonization.
- A joint "Orbital AI Lab" could emerge, scaling from **low Earth orbit prototypes** to **deep-space solar farms**.

📈 Investor Takeaways

- **Short-term:** Watch NVDA and TSLA disclosures for mentions of "orbital AI," "space cooling," or "solar compute." These will be early signals.
- **Medium-term:** Position in aerospace suppliers (satellite builders, solar panel manufacturers, radiation-hardened chipmakers).
- **Long-term:** If Musk and Huang succeed, this could be a **multi-trillion-dollar industry**, comparable to the internet's rise—investors should track **cross-sector ETFs** and **venture-backed startups** in space AI.

Bottom line: Musk is sketching the roadmap to a Kardashev Type II civilization via solar-powered orbital AI, and Huang is providing the engineering rationale. Their cooperation could seed a new industry—**space-based AI infrastructure**—with scale rivaling terrestrial cloud computing. Investors who anticipate this convergence early could capture outsized returns.

1 Kiplinger 2 CNBC 3 The White House 4 Benzinga 5 Mashable India
6 www.financialcontent.com 7 Gulf News

What is a Kardashev Type II Civilization?

The **Kardashev Scale** is a method proposed in 1964 by Soviet astronomer Nikolai Kardashev to measure the technological advancement of a civilization based on its ability to harness and use energy.

Type	Energy Consumption (approximate)	Description	How it harnesses energy
Type I	~10^{16} – 10^{17} W (all energy available on a planet)	Controls all energy resources of its home planet (weather, volcanoes, earthquakes, etc.). Humanity is currently ~Type 0.73.	Planetary-scale (fusion, full renewable coverage, etc.)
Type II	~10^{26} W (the entire energy output of its parent star)	Fully controls the energy of its home star and can harness it on a stellar scale.	Typically via a **Dyson sphere** or **Dyson swarm** – a megastructure (or cloud of satellites) that completely surrounds the star and captures most or all of its radiated energy.
Type III	~10^{36} W (the entire energy output of its galaxy)	Controls energy on the scale of an entire galaxy (Milky Way outputs ~10^{37} W).	Network of Dyson spheres around billions of stars.

Key Features of a Type II Civilization

1. **Energy Mastery**
   - A Type II civilization uses roughly **4×10^{26} watts** — equivalent to the total power output of the Sun (about 400 million billion billion watts).
   - This is ~10 billion times more energy than a Type I civilization and ~100 trillion times more than modern Earth (2025: ~$2–3 \times 10^{13}$ W).
2. **Dyson Sphere / Dyson Swarm**
   - The classic way to reach Type II is to build a **Dyson sphere** (a solid shell around the star) or, more realistically, a **Dyson swarm** — millions or billions of orbiting solar collectors, habitats, and solar sails that together capture nearly all of the star's energy.
   - The material required is enormous: dismantling and repurposing entire planets (e.g., Mercury) into solar-capturing structures.
3. **What Life Looks Like**
   - Essentially unlimited energy → post-scarcity society.
   - Ability to perform computations and simulations on an astronomical scale (e.g., simulate entire universes).
   - Interstellar travel becomes routine (with that much energy, you can accelerate huge ships to significant fractions of light speed).
   - Megastructures everywhere: ringworlds, orbital habitats for trillions of beings, stellar engines to move the entire solar system if needed.

4. **Why Elon Musk Talks About It**
    - Musk (and many futurists) argue that continuing exponential growth in energy demand — especially from AI — will force humanity to become multi-planetary and eventually Type II.
    - If AI keeps doubling compute needs every few months/years, Earth's energy supply will be exhausted in decades. The only scalable solution is to capture the Sun's full output in space (via giant orbital solar arrays + space-based data centers cooled by radiation into the 3 K cosmic background).

Timeline Estimates

- Optimistic (Musk-like): Humanity could start approaching Type II in the 22nd–23rd century if we aggressively colonize the solar system and build Dyson swarms.
- Pessimistic: Thousands or millions of years — or never, if we fail to become a multi-planetary species.

In short: A **Kardashev Type II civilization** is one that has achieved total mastery over its star, living with the energy equivalent of an entire star at its disposal — the inevitable endpoint for any civilization that survives long enough and keeps growing its energy and computational power.

Was the Date of the US-Saudi Investment Forum Specially Chosen by Trump to Coincide with NVIDIA's Earnings Announcement?

The U.S.-Saudi Investment Forum took place on **November 19, 2025**, at the Kennedy Center in Washington, D.C., with speeches and a panel featuring Elon Musk and Jensen Huang discussing AI, advanced computing, and digital infrastructure. NVIDIA announced its fiscal Q3 2026 earnings (for the quarter ended October 26, 2025) after market close on the **same day, November 19, 2025**.

It's highly unlikely that President Trump personally chose November 19 specifically to align with NVIDIA's earnings release for manipulative reasons (e.g., to influence stock volatility or "pump" NVDA on a big news day). Here's why:

- Corporate earnings dates are set months in advance by the company (NVIDIA confirmed its date publicly weeks earlier).
- High-level diplomatic events like a crown prince visit and investment forum are scheduled around state visit logistics, not quarterly corporate calendars. The forum followed Mohammed bin Salman's White House meetings and built on prior U.S.-Saudi deals from Trump's May 2025 Middle East trip.
- That said, the overlap was **extremely convenient** for NVIDIA and the broader AI sector. The event highlighted massive Saudi commitments, including a government-backed AI firm (HUMAIN) planning to buy **600,000 NVIDIA AI chips** and other deals potentially worth hundreds of billions. Huang spoke shortly before earnings, and the positive headlines (Saudi as an "AI superpower," joint data centers, etc.) provided a strong backdrop. NVIDIA's results beat expectations (revenue ~$57B vs. ~$55B expected), and the stock rose in after-hours trading.

In short: Coincidental timing, but it created perfect optics for AI investment hype on a day when global attention was already on NVIDIA.

Elon Musk's Vision for AI in Space and Reaching Kardashev Type II

Musk has long framed humanity's future in terms of the **Kardashev Scale** (a measure of civilization advancement by energy harnessing):

- Type I: Uses all energy available on its planet.
- Type II: Harnesses the full energy output of its star (e.g., via a Dyson sphere/swarm).
- Humanity is currently ~0.7 on the scale.

At the forum (and in recent posts/tweets), Musk argued that **deploying AI compute into space is inevitable and essential** for scaling civilization to Type II. Key points he emphasized:

- **Earth-bound limits**: Power, cooling, and land constraints will cap AI growth soon. Even aggressive builds (nuclear, renewables) can't keep up with exponential AI energy demand.
- **Space advantages**:
  - Unlimited 24/7 solar power (no night/clouds/atmosphere loss).
  - Near-zero gravity and vacuum enable massive, lightweight structures.
  - Radiative cooling in space is free and infinite (no fans, water, or pumps needed).
- **The plan in practice**:
  1. Use SpaceX's Starship (fully reusable, massive payload) to launch AI-optimized supercomputers into orbit or deep space.
  2. Build constellations of **solar-powered AI satellites** — essentially orbiting data centers with NVIDIA (or similar) GPUs.
  3. Beam power/results back to Earth via lasers or high-bandwidth links (Starlink tech evolves into this).
  4. Start modest (LEO clusters), scale to enormous swarms harvesting meaningful fractions of the Sun's output.
  5. Timeline: Musk suggested cost-effectiveness flips to space-based AI within **4–5 years**, well before Earth energy is "exhausted."

This isn't just compute — Musk envisions these satellites enabling a Type II leap: harvesting solar energy at scale, potentially even modulating Earth's climate by tiny adjustments to incoming sunlight (a form of geoengineering).

It's aligned with existing SpaceX efforts (Starlink already has thousands of solar-powered satellites) but would require orders-of-magnitude more launches and new radiation-hardened, zero-maintenance hardware.

Jensen Huang's Comments on Space-Based Cooling

Huang fully endorsed the vision and provided the hardware angle that makes it feasible:

- Today's liquid-cooled AI supercomputer racks (e.g., NVIDIA GB300/Blackwell) weigh **~2 tons**, of which **~1.95 tons is cooling infrastructure** (pumps, radiators, plumbing, etc.).
- In space: "Just hang it up." Vacuum allows pure **radiative cooling** — chips radiate waste heat directly as infrared into cold space (~3K background). No water½, no fans, dramatically lighter/cheaper racks.
- Combined with Musk's point on unlimited solar, this removes two biggest Earth constraints (power + cooling) for exascale+ AI training/inference.

Huang's punchline was humorous but spot:on — space turns today's bloated, power-hungry data centers into elegant, minimal systems.

Potential Tesla/SpaceX + NVIDIA Cooperation on Space Projects

Yes, Musk and Huang already collaborate deeply (Tesla Dojo uses NVIDIA tech; xAI buys billions in GPUs), and the forum panel strongly hinted at **direct cooperation on space-based AI**:

- Musk: "We're building these supercomputers together" (referring to NVIDIA racks for orbital deployment).
- Huang was enthusiastic, focusing on engineering enablers.
- Separate from NASA/Artemis (human Mars landing), this would be a **commercial SpaceX + NVIDIA (and partners like xAI/HUMAIN) initiative**.
- **Scale**: Potentially enormous — Musk talks terawatts to petawatts of orbiting compute. Early phases could involve dozens/hundreds of Starship launches per year; long-term, a Dyson-swarm precursor harvesting 0.001%+ of solar output.
- Announced ties: xAI + NVIDIA partnering with Saudi's HUMAIN on Earth data centers, but the space vision extends that logic globally/orbitally.

No formal "Space AI JV" announced yet, but the forum discussion framed it as the logical next step.

What Can Investors Do?

1. **Core plays:**
   - **Tesla (TSLA):** Benefits from SpaceX synergy (Musk cross-pollinates tech/talent; Starship enables everything).
   - **NVIDIA (NVDA):** The pick-and-shovel for AI hardware — space or ground. Space racks still need GPUs.
2. **Indirect exposure:**
   - SpaceX remains private, but watch for potential spin-offs or Starlink IPO rumors.
   - Suppliers: Companies in radiation-hardened components, launch services, or orbital power transmission.
3. **Long-term thematic:**
   - ETFs/themes in AI infrastructure, space economy (e.g., ARKX, UFO), or clean energy (space solar could disrupt terrestrial power).
   - Saudi-related plays if HUMAIN/xAI deals expand.

This is still visionary/early-stage — execution risks are massive (radiation, latency, cost per launch). But if Musk/Huang deliver even 10% of the vision, it reshapes energy, compute, and markets. Position for the multi-decade AI + space convergence, but size accordingly given volatility.