US Stock Express

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Do you still remember?

Who is King of Kings?
Who is Lord of Lords?

GOOG goes up to 2nd place in top 10 market capitalization.

Already forecasted in The Express of 20251121

The Hallelujah Chorus in Messiah is written in counterpoint style, which means the King of Kings and Lord of Lords will have a seesaw battle to and fro. So do not mind so much if one surpasses the other. For GOOG, please refer to The Express of 20250804, 20250909, 20250917, 20251119, 20251121, 20251124, 20251126, 20251201.

For NVDA please refer to page 6-9 of today.

Largest Companies by Marketcap

Companies: **10,642** total market cap: **$138.037 T**

Rank by: Market Cap | Earnings | Revenue | Employees | P/E ratio | Dividend % | Market Cap gain | More +

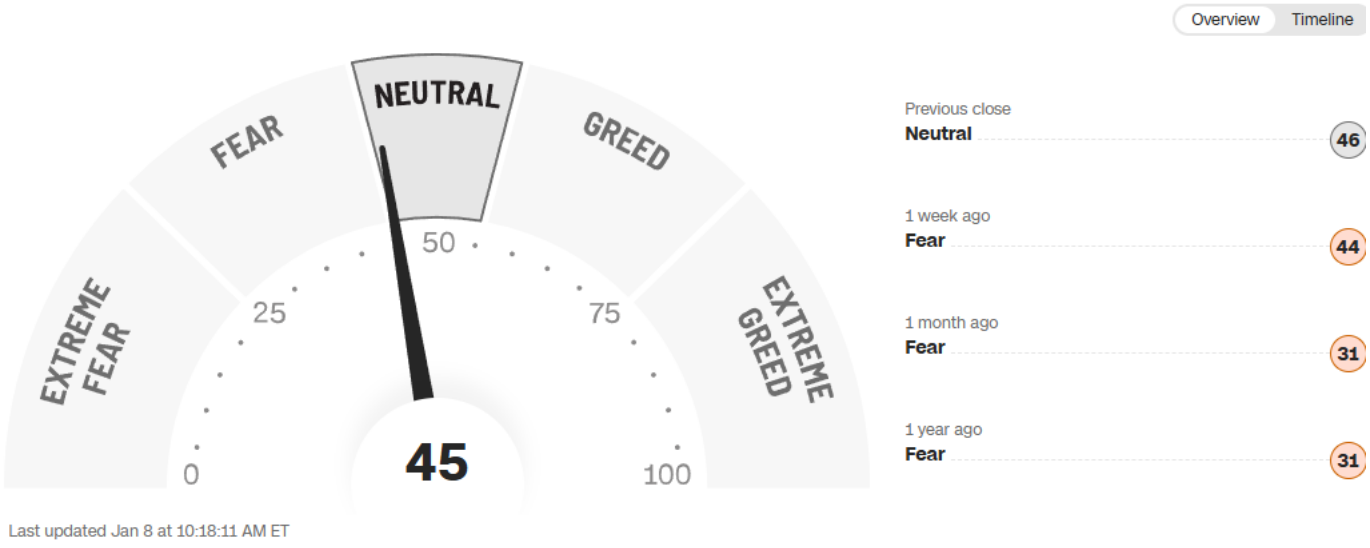
	Rank	Name	Market Cap	Price	Today	Price (30 days)	Country
☆	1	NVIDIA NVDA	$4.604 T	$189.11	0.98%		USA
☆	↑1 2	Alphabet (Google) GOOG	$3.892 T	$322.43	2.51%		USA
☆	↓1 3	Apple AAPL	$3.863 T	$260.33	0.77%		USA
☆	4	Microsoft MSFT	$3.593 T	$483.47	1.04%		USA
☆	5	Amazon AMZN	$2.582 T	$241.56	0.27%		USA
☆	6	TSMC TSM	$1.652 T	$318.68	2.67%		Taiwan
☆	7	Meta Platforms (Facebook) META	$1.635 T	$648.69	1.81%		USA
☆	8	Broadcom AVGO	$1.628 T	$343.50	0.08%		USA
☆	9	Saudi Aramco 2222.SR	$1.525 T	$6.31	0.30%		S. Arabia
☆	10	Tesla TSLA	$1.434 T	$431.41	0.36%		USA
☆	11	Berkshire Hathaway BRK-B	$1.070 T	$496.12	0.59%		USA
☆	12	Eli Lilly LLY	$993.35 B	$1,108	4.14%		USA
☆	13	JPMorgan Chase JPM	$899.14 B	$326.99	2.28%		USA
☆	14	Walmart WMT	$898.69 B	$112.72	1.42%		USA
☆	15	Tencent TCEHY	$723.71 B	$79.59	1.74%		China
☆	16	Visa V	$686.81 B	$355.88	0.47%		USA
☆	17	Samsung 005930.KS	$638.93 B	$95.56	1.56%		S. Korea
☆	18	Oracle ORCL	$554.05 B	$192.84	0.47%		USA
☆	19	Mastercard MA	$524.25 B	$579.92	0.07%		USA
☆	20	Exxon Mobil XOM	$505.15 B	$118.49	2.11%		USA

Market is so high now, better concentrate on top 10 or top 20, for even if the market collpases, their recovery power is so strong. Too many potential stocks to buy, but too little capital left in hand!
Please have a thorough antomy of the market first, do not rely on copy trade.

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*

Sources predict that Chinese authorities will mandate that companies purchase domestically made AI chips. This move comes as NVIDIA accelerates H200 supply, with Chinese companies reportedly ordering over 2,000,000 H200 chips, expected to be delivered in 2026. Since NVIDIA currently only has about 700,000 chips available, the company has consulted with TSMC about increasing production. NVIDIA and Chinese authorities did not immediately respond to Reuters' requests for comment.

The White House stated that President Trump signed a memorandum today ordering the withdrawal of the United States from 66 international organizations, arguing that these organizations "no longer serve the interests of the United States." The White House statement on social media platform X indicated that the order covers 31 UN organizations and 35 non-UN agencies, but did not disclose the specific names of these entities.

Cambodia announced that it has extradited billionaire businessman Chen Zhi, suspected of orchestrating a massive cryptocurrency scam, to China. The scam allegedly lured victims to forced labor camps and defrauded them globally, stealing billions of dollars in cryptocurrency. Cambodia revoked his visa and sent him back to China to avoid trial in the US and UK.

US President Trump said today that he hopes to increase the US defense budget by half next year, bringing the total to $1.5 trillion, to address "turbulent and dangerous times."

Regarding Denmark's offer to hold talks with the US, US Secretary of State Marco Rubio said he plans to hold talks with Denmark next week.

World Observation

Day	1416
Russia/Ukraine Conflict	

The advent of FAFO era

(2) Pressing down or accelerating World War III

What's the meaning of FAFO? Fuck Around, Find out! The focus is in Find Out what.

FA is Fool around or Fuck around, easy to understand. Please refer to The Express of 20251223 and 20251125. Donald Trump issued ultimatum to Maduro to surrender. Maduro neglected it and challenged publicly for Trump to capture him. Simply because he has 6 residences (Kim of North Korea only 3), each place is equipped with a shelter that has a steel door for asylum. The DELTA force already gets ready with special welding tools and can open the steel door in 47 seconds before reinforcement arrives. From his bedroom to the shelter of course is a very short distance, but still intercepted by Delta force and captured him. Why?

Maduro was told the JY-27V stealth Killer Radar can detect F35, F22 and all kinds of war planes of US. The chief controller is from China and not Venezuela so should not afraid of insufficient training. Regretfully, they do not allow opposition voices for it is a symptom of timid and no confidence. US deliberately let them detect the flights of F35 in Caribbean Sea, and collect data from JY-27V and misled them as if they can really detect the flights of F35. The EA-37B Electronic Warfare Aircraft had not turned up until the actual war comes.

Venezuela believed they had found out F-35 but in turn it is EA-37B found out all radar locations of JY-27V and disabled them. Then F35 and 150 planes paralysed all command units and military bases to clear an air corridor for black hawk helicopters to fly in and the hardest time is to fly back. For the attack of 150 planes surely aroused large bombing sound and light in 2:00am prominently. US can find out Maduro among the 6 residences easily but Venezuela could not find out a single US plane and could not shoot down just one among the 150 with their invincible radar and S300 anti-missile system.

If you live in a place without Freedom of Press (FOP) or the index of FOP is quite low, you cannot get the precise evaluation of yourself and the counterpart, for all opposition voices are down-shelved. Famous think tanks and military websites all said there are only 2 countries in the world that have such a power of *Capitation (killing the head of state by a single military action)*, which is Israel and US. It needs high technology and precise information and accurate attack. Such as Israel said they can kill the one sitting next to the driver without hurting anyone inside the car. It needs quite high a technology. But if saying as going into the capital and find out the target among 6 residence and fly back safely in the air corridor, only one country that is US can do it. You can see the Blackhawks are flying so low but none of the shoulder needle anti-missile system can shoot them down during those 2 hours.

Where are they? All paralyzed cannot receive order from above!

Now Columbian president already phoned to Trump before the deadline, just to talk with him, better than being captured and charged in the New York Court. Who will be the next? Israel and US are ready to go ahead to have another operation in Iran. People complained that this should be done by UN and not US. However, UN has no international police, and US does not want to be international police at all. They want to protect their national security only. Such as Hamas, they used children and women in hospital as shelter to shoot our missile, if you do not have counter attack, you will die and being victim, you cannot say anything and vanished. But if you fight back, and hurt those children and women in hospital where the UN does not allow anyone to use them as shelter, you will be complained. But UN cannot do anything. That's why Donald Trump said he has to withdraw from 66 international organizations.

Black and white is not so simple, whether FAFO is a means to press down World War III or accelerating World War III, just wait and see. Who is the target of Trump to find out next? Who will be the one after next? ……

Turn round your eyes, please mind the CES in Las Vegas, a new generation of AI has already stepped out by Rubin of NVDA. Another new era is ahead of us. The future is not ours to see, what we can do is to turn crisis into chances and make more money, but must has a through anatomy mind in all happenings under the sun first.

Quick Answer: NVIDIA's Rubin platform is critical because it represents a leap in AI compute efficiency—up to *5× faster than Blackwell*—making large-scale AI training and inference economically viable. Google's TPU remains highly specialized and efficient, but Rubin's versatility and integration across six co-designed chips give NVIDIA an edge in general-purpose AI workloads. Alphabet (GOOG) has overtaken 2nd place in market cap, but surpassing NVIDIA depends on sustained TPU adoption and cloud AI demand. NVDA's self-driving push pressured Tesla (TSLA), yet GOOG's broader AI narrative lifted its stock more strongly than NVDA's incremental gain.

🔑 Why Rubin Matters

- **Extreme co-design:** Rubin integrates six chips (CPU, GPU, NVLink switch, etc.) into a single "giant brain," enabling unprecedented efficiency. DATAQUEST + 2
- **Performance:** Built on TSMC's 3nm node, Rubin delivers *up to 5× Blackwell's performance* ExtremeTech.
- **Economic impact:** Token generation costs drop to *one-tenth* of Blackwell, making LLMs and generative AI far cheaper to deploy. Design Engineering
- **Practical usage:**
  - Training trillion-parameter LLMs at lower cost.
  - Real-time inference for robotics, healthcare, and autonomous driving. NVIDIA Blog
  - Cloud-scale AI services, reducing infrastructure strain. The Tech Portal

⚔️ Rubin vs Google TPU

Feature	NVIDIA Rubin	Google TPU (Ironwood, 7th Gen)
Architecture	Six-chip co-design (CPU+GPU +switches) DATAQUEST + 1	Systolic array, tensor-optimized www.lovechip.com
Performance	5× faster than Blackwell ExtremeTech	Highly efficient for dense matrix ops www.lovechip.com
Flexibility	General-purpose AI + HPC workloads	Specialized for deep learning
Deployment	Data centers, robotics, autonomy NVIDIA Blog	Google Cloud AI workloads igor´sLAB
Market impact	Broad adoption across industries	Strong but limited to Google ecosystem

Sources: DATAQUEST + 6

📈 Market Capitalization Dynamics

- **Alphabet (GOOG):** $322.43 (+2.5%) bing.com
- **NVIDIA (NVDA):** $189.18 (+1.0%) bing.com
- **Tesla (TSLA):** $431.41 (–0.35%) bing.com

GPT-5 is here - OpenAI

- **Why GOOG rose more than NVDA:**
  - GOOG's TPU narrative ties directly to cloud AI adoption, which investors see as scalable revenue.
  - NVDA's Rubin announcement was expected, so the stock reaction was muted.
  - NVDA's self-driving showcase pressured TSLA, but investors view autonomy as a long-term play, not immediate revenue.

⚠️ Risks & Trade-offs

- **NVIDIA:** Rubin rollout depends on manufacturing yields at TSMC's 3nm and customer adoption.
- **Google:** TPU success hinges on cloud dominance; limited external adoption may cap upside.
- **Tesla:** NVDA's autonomy push highlights competitive risk, but TSLA's valuation already priced in high expectations.

👉 **Bottom line:** Rubin is transformative for AI economics, but GOOG's TPU strategy plus cloud scale gives it momentum in market c DATAQUEST + 2 ap. NVDA remains the hardware leader, yet GOOG's narrative strength explains why it outperformed N ExtremeTech VDA in stock reaction.

Would you like me to build a **scenario matrix** comparing NVDA vs GOOG market cap trajectories over the next Design Engineering 12 months? That could highlight catalysts, risks, and adoption timelines. NVIDIA Blog The Tech Portal DATAQUEST + 1 www.lovechip.com ExtremeTech www.lovechip.com NVIDIA Blog igor´sLAB DATAQUEST + 6 bing.com bing.com bing.com

DATAQUEST
NVIDIA Rubin unveiled at CES 2026: Is NVI...

ExtremeTech
Nvidia Debuts Next-Generation Vera Rubi...

Show all

Importance of NVIDIA's Rubin AI Platform and Why It's Considered Next-Generation AI

At CES 2026 in Las Vegas, NVIDIA CEO Jensen Huang unveiled the Vera Rubin platform, a comprehensive AI supercomputer system comprising six new chips (including the Rubin GPU, Vera CPU, and advanced networking components). This platform is positioned as the successor to NVIDIA's Blackwell architecture, marking a shift toward "AI factories" – massive, integrated systems designed for training, deploying, and running the world's largest AI models at unprecedented scale and efficiency. Its importance stems from addressing key bottlenecks in modern AI infrastructure, such as communication between GPUs, memory constraints, and multi-step reasoning processes in agentic AI (systems where AI agents collaborate on complex tasks). Rubin enables faster scaling of AI into industries, reducing costs and energy use while supporting emerging "physical AI" applications, like simulating real-world environments or generating videos from images. It's dubbed "next-generation" because it optimizes for inference-heavy workloads (running trained models) over raw compute, incorporating HBM4 memory for 2.8x higher bandwidth (up to 22 TB/s per chip) and NVLink advancements, making it ideal for the evolving demands of AI beyond simple training. nvidianews.nvidia.com +6 more

Regarding the claim of being 5 times faster than Blackwell: This specifically refers to AI inference performance, with Rubin delivering up to 50 petaflops of FP4 inference (5x Blackwell's equivalent) and training mixture-of-experts (MoE) models using 4x fewer GPUs, leading to up to 5x lower overall costs. Density improvements (60% higher) and unknown but likely higher clock speeds contribute to potential 45-60% gains in client-side performance. hpcwire.com +3 more

Practical Usages of Rubin

Rubin's design targets real-world AI deployment in data centers and cloud environments, with partners like CoreWeave and Microsoft Azure integrating it starting mid-2026. Key applications include: nvidianews.nvidia.com azure.microsoft.com

- **AI Training and Inference at Scale**: Accelerating large language models (LLMs) and MoE architectures for chatbots, recommendation systems, and predictive analytics, with 10x lower token costs than Blackwell for inference. notebookcheck.net nvidia.com
- **Physical AI and Simulation**: Generating realistic videos from single images, synthesizing multi-camera driving scenarios, or modeling edge-case environments for testing – crucial for industries like automotive, robotics, and manufacturing. blogs.nvidia.com
- **Autonomous Systems**: Enhancing self-driving tech with "reasoning" AI for better decision-making in vehicles, including NVIDIA's new open-source models for AVs. theguardian.com
- **Cloud and Enterprise AI Factories**: Enabling secure, low-cost AI systems for hyperscalers, reducing energy footprints in data centers while handling complex, context-heavy queries. nvidianews.nvidia.com sify.com

In essence, Rubin shifts AI from isolated models to interconnected "factories," making advanced AI more accessible for businesses.

Comparison of Google's TPU with NVIDIA's Rubin

Google's Tensor Processing Units (TPUs), like the current TPUv7, are specialized ASICs optimized for Google's internal AI workloads, offering strong performance-per-watt and cost advantages within Google's ecosystem (e.g., better for specific matrix math in training/inference). However, Rubin outperforms in versatility and scale: It provides 5x inference boosts over Blackwell (which already leads TPUs), with integrated racks, higher bandwidth, and support for general-purpose AI beyond Google's closed stack. Upcoming TPUv8 is expected to lag behind Rubin and competitors like AMD's MI450 in shipment timelines and raw capabilities. TPUs excel in efficiency for hyperscalers like Google but lack NVIDIA's ecosystem breadth, software (e.g., CUDA), and market dominance in third-party sales. Overall, Rubin leapfrogs TPUs in AI infrastructure, though TPUs remain a threat for cost-sensitive, in-house use. reddit.com +6 more

Google's Rise to 2nd in Market Cap and Potential to Surpass NVIDIA

As of January 2026, market cap rankings show NVIDIA leading at ~$4.5-4.6 trillion, followed by Alphabet (Google) at ~$3.8-3.9 trillion (recently surpassing Apple, which sits at ~$3.9 trillion but dipped slightly). Google's ascent to 2nd place reflects strong AI growth via Gemini models, cloud services, and ad revenue, boosted by TPU efficiencies. fool.com +3 more

Can Google surpass NVIDIA soon? It's possible but not guaranteed in the near term. Analysts see Alphabet as a strong contender, potentially reaching $4-5 trillion by leveraging AI chips and stealing share from NVIDIA, with Polymarket odds at 35% for Google being the largest by end-2026 (tied with NVIDIA). However, NVIDIA's AI GPU dominance, projected 50-60% capex growth, and Rubin rollout support sustained leadership, with targets up to $210/share by mid-2026. Google would need massive TPU adoption and AI breakthroughs to close the gap quickly. fool.com +3 more

NVIDIA's Self-Driving Announcement and Stock Impacts

NVIDIA announced a new family of open-source AI models (including "Alpamayo") for autonomous vehicles, plus "reasoning" AI tech to enhance self-driving decision-making. This includes plans to test its own self-driving service, positioning NVIDIA as a full AV platform provider for automakers. theguardian.com +2 more

- **TSLA Drop**: Tesla shares fell ~3% post-announcement, as investors viewed NVIDIA's entry into robotaxis and AV tech as direct competition to Tesla's Full Self-Driving (FSD) monopoly. Though Huang praised Tesla's stack as "state-of-the-art," the move signals broader ecosystem challenges for TSLA. Musk downplayed it, saying NVIDIA is "many years away." finance.yahoo.com +4 more
- **NVDA Rose Little**: NVIDIA ticked higher modestly (~1-2%), as the AV news complements its core AI chip focus but was somewhat expected amid Rubin's hype; markets may have already priced in broader AI expansion. msn.com tipranks.com
- **GOOG Rose More**: Alphabet gained more (~2-3%), likely due to its diversified AI portfolio (including Waymo self-driving) benefiting from industry momentum without direct threat. Google's TPU and cloud strengths position it as an ecosystem enabler, not a pure competitor in AV hardware like TSLA. Overall, the announcement boosted AI sentiment, favoring broader players like Google over specialized ones like Tesla. tipranks.com finance.yahoo.com