

US Stock Express

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Strait of Hormuz & Petroleum



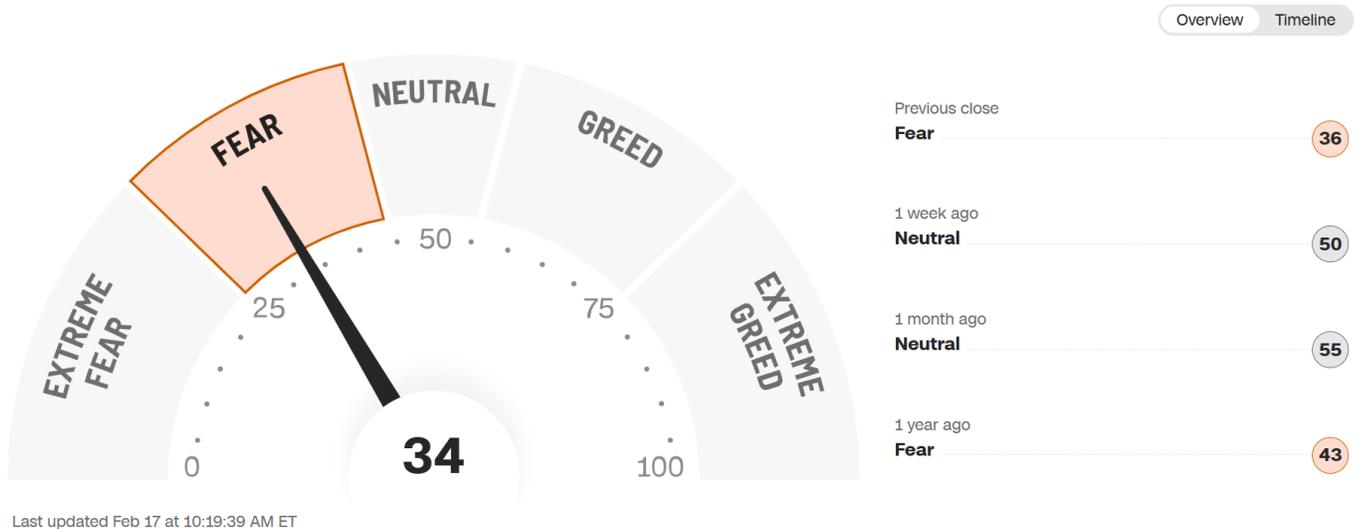
Oil price rises since 2026

*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

Traders are closely watching geopolitical risks ahead of the US-Iran talks, which have resumed. Brent crude oil is trading above \$68 a barrel after its first two-week losing streak this year, while WTI crude is hovering around \$64. According to Iran's semi-official Tasnim News Agency, the Iranian Islamic Revolutionary Guard Corps Navy conducted "smart drills" near the Strait of Hormuz. This strait is a vital global shipping route, through which approximately one-fifth of the world's crude oil shipments pass.

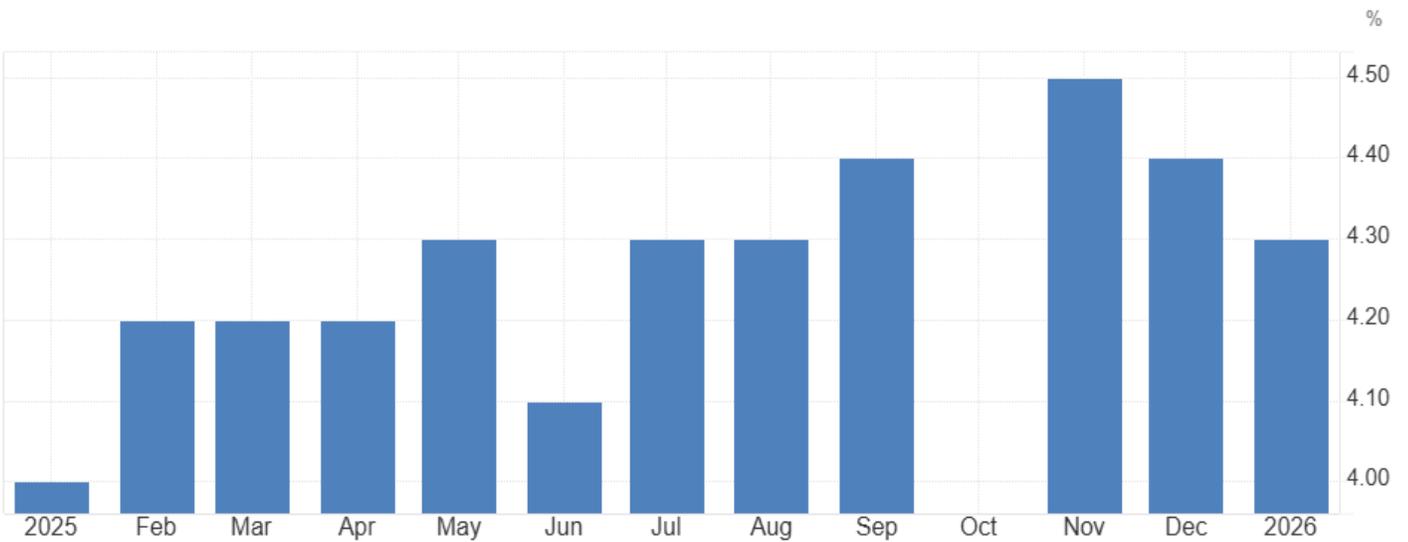
Market rumors have widely circulated that Apple's first foldable iPhone is expected to launch in the fall of 2026, featuring a book-like opening and closing design similar to current mainstream foldable phones, offering a larger screen size and a tablet-like user experience when unfolded.

Instagram CEO Adam Mosseri, defending the platform in a Los Angeles court, stated that even users spending up to 16 hours a day on social media cannot be considered clinically addicted. These remarks immediately drew strong public criticism.

Japan detained a Chinese fishing vessel for illegally entering its Economic Zone (EEZ) and illegally using tiger nets, severely damaging the marine ecosystem and hindering the growth of juvenile fish. Due to recent similar incidents, the Japanese Fisheries Agency has tightened enforcement. The fishing vessel was released after the Chinese consulate quietly paid a bail bond. However, this incident has further strained relations between the two countries.

The Walt Disney Company sent a cease and desist letter to ByteDance, accusing the company of unauthorized use of Disney copyrighted characters, including well-known IPs such as Star Wars and Marvel superheroes, when training its Seedance 2.0 model. ByteDance launched its new generation video creation model, Seedance 2.0, which has already sparked strong backlash from the Hollywood industry within two days. Some also worry that their personal privacy and usage habits will be compromised.

US Unemployment Rate (long term & short term)



Calendar	GMT	Reference	Actual	Previous	Consensus	TEForecast
2026-01-09	01:30 PM	Dec	4.4%	4.5%	4.5%	4.6%
2026-02-11	01:30 PM	Jan	4.3%	4.4%	4.4%	4.5%
2026-03-06	01:30 PM	Feb		4.3%		



Market Observation

Day 1456
Russia/Ukraine Conflict

Unemployment & Military Stocks

One of the hottest topics of nowadays is that would AI replace human jobs. Some said that the changed has already started. Some said that no need to worry, AI will also generate new jobs. Actually, what we have to mind is that those that need extensive knowledge jobs or labour-intensive jobs are in high risk. Or we can say white collar jobs are of high risk and blue collars are of lower risk.

Formerly, when we wanted to find out the speech of a famous person or news of last year, we have to spend an afternoon in the library, later on we can search in the internet and now we can ask the AI and they not only can provide the data, but also can give comments. Therefore, those jobs that need extensive knowledge will be replaced by AI. Such as medical doctor, he has to study the anatomy of human body, and numerous cases, and then the effect of various medicines, but with the help of AI, they can prescribe the most accurate medicine according worldwide experience of the same disease. It may take 10 years for a medical doctor to be in a medium level and if in higher level or go to specialized sectors will be another 10 years. But for AI deep thinking is just 10 minutes, and the cases consulted will be more than any single doctor. We also have to mind the stock of TEM for they are using AI to prescribe medicine.

Also, in the case of a lawyer, no lawyer can have the comprehensive search as that of an AI. So, for engineers of writing program, we do not need any people to study programming, just give orders to AI and they will do it properly. The progress of AI is so fast and not just jump up by year or months,

may be in weeks or in anytime you are not aware of. Such as The Express is using GPT 5.0 and when facing any imperfectness, the writer also said we have to wait for AGI (super AI) in the future to solve it. Suddenly, after the Turing Test, they said GPT 4.5 already up to the level of AGI. We are already in super AI level but we are not noticed and they already up to that level.

The long-term readers of The Express should remember that Chat GPT launched out in 2022, and Artemis Project also in 2022. The lowest Unemployment in the past half a century is 3.5%, in July 1969 that is the Landing of the Moon for it is the largest project that US ever had. Space competition reignited in 2022, and bring the down the unemployment rate to 3.5% in 2022, as low as the month of Landing on the Moon. When GPT launched out, it really can create more jobs. In early 2023, there is Sora, the GPT that can produce videos also launched out, unemployment in Jan and April of 2023 was as low as 3.4%, even lower than 1969, for the Artemis Project started.

The Unemployment rate in Jan is 4.3% even lower than 4.4% of Dec 2025. But one thing we have to mind, the tension among world affairs is tightened and not just in any single area of countries, it affects the universal value formed after World War II, therefore you can see military stocks rose sharply, of course, most of them are having duplication with space industry stocks, like RTX, LMT, NOC and GD. Also PLTR will be useful in capturing keymen.

The AI covers a lot of important and hot fields including healthcare, financial services, manufacturing, retail, transportation and logistics, technology and media, energy and climate, legal and professional services, please refer to the AI comments as attached.

The AI comments are very useful and down-to-earth this time.



GPT-5 is here - OpenAI

Recognised AGI (super AI) level

General Effect of AI on Unemployment

AI's impact on jobs is complex — it's not a simple story of mass replacement, but rather one of **disruption, transformation, and reallocation**:

- **Job Displacement**
 - AI is automating routine, repetitive, and predictable tasks, especially in white-collar sectors like customer service, legal research, accounting, and content creation.
 - Early evidence suggests that generative AI adoption has slowed job growth in some areas, contributing to a modest rise in unemployment (e.g., U.S. unemployment rose to 4.2% in mid-2025, compared to pre-pandemic averages of 3.7%) Federal Reserve Ba... .
- **Job Creation**
 - At the same time, AI is creating new roles in AI development, data management, ethics, compliance, and human-AI collaboration.
 - Industries like healthcare, education, and space exploration (as you noted with Artemis) can benefit from AI-driven productivity, potentially offsetting losses.
- **Acceleration of Change**
 - Experts warn that the pace of AI-driven layoffs is intensifying, with 2026 expected to bring a "tsunami-like" impact on the labor market if reskilling and adaptation don't keep up CNBC .

When Will the Hardest Time Come?

- **Near-Term (2025–2027)**
 - This period is likely to be the most turbulent. Companies are rapidly adopting AI, but workforce reskilling programs are lagging.
 - Anxiety and layoffs are expected to peak around 2026 as firms restructure to integrate AI more deeply CNBC .
- **Medium-Term (2028–2035)**
 - Economists expect stabilization as new industries mature and education systems adapt.
 - Historical precedent: past technological revolutions (industrial, digital) caused short-term disruption but ultimately expanded employment in new sectors.

What Can General Citizens Do?

Here are practical strategies to stay resilient:

 GPT-5 is here - OpenAI

Recognised AGI (super AI) level

- **Upskill Continuously**
 - Learn AI-related tools (prompt engineering, data literacy, automation platforms).
 - Focus on skills AI struggles with: creativity, emotional intelligence, leadership, and complex problem-solving.
- **Embrace Lifelong Learning**
 - Online courses, certifications, and micro-credentials can help you pivot quickly.
 - Governments and companies are beginning to fund reskilling programs — take advantage of them.
- **Diversify Career Paths**
 - Explore industries less vulnerable to automation: healthcare, skilled trades, education, green energy, and space/aerospace.
 - Hybrid roles (human + AI collaboration) will be in demand.
- **Stay Adaptable**
 - Flexibility in career expectations will be key. The hardest-hit workers will be those who resist change.

Bottom Line

AI is not a job apocalypse, but a **job reshaping force**. The hardest time will likely be in the next 2–3 years as layoffs peak and reskilling lags. Citizens who **adapt early, embrace AI tools, and focus on human-centric skills** will be best positioned to thrive in the new economy.

Would you like me to break down **which specific white-collar jobs are most at risk vs. most likely to grow** in the next 5 years? That could give you a sharper picture of where opportunities lie.

Is AI Contributing to Rising Unemployment? Evidence from Occupational Variation

August 26, 2025

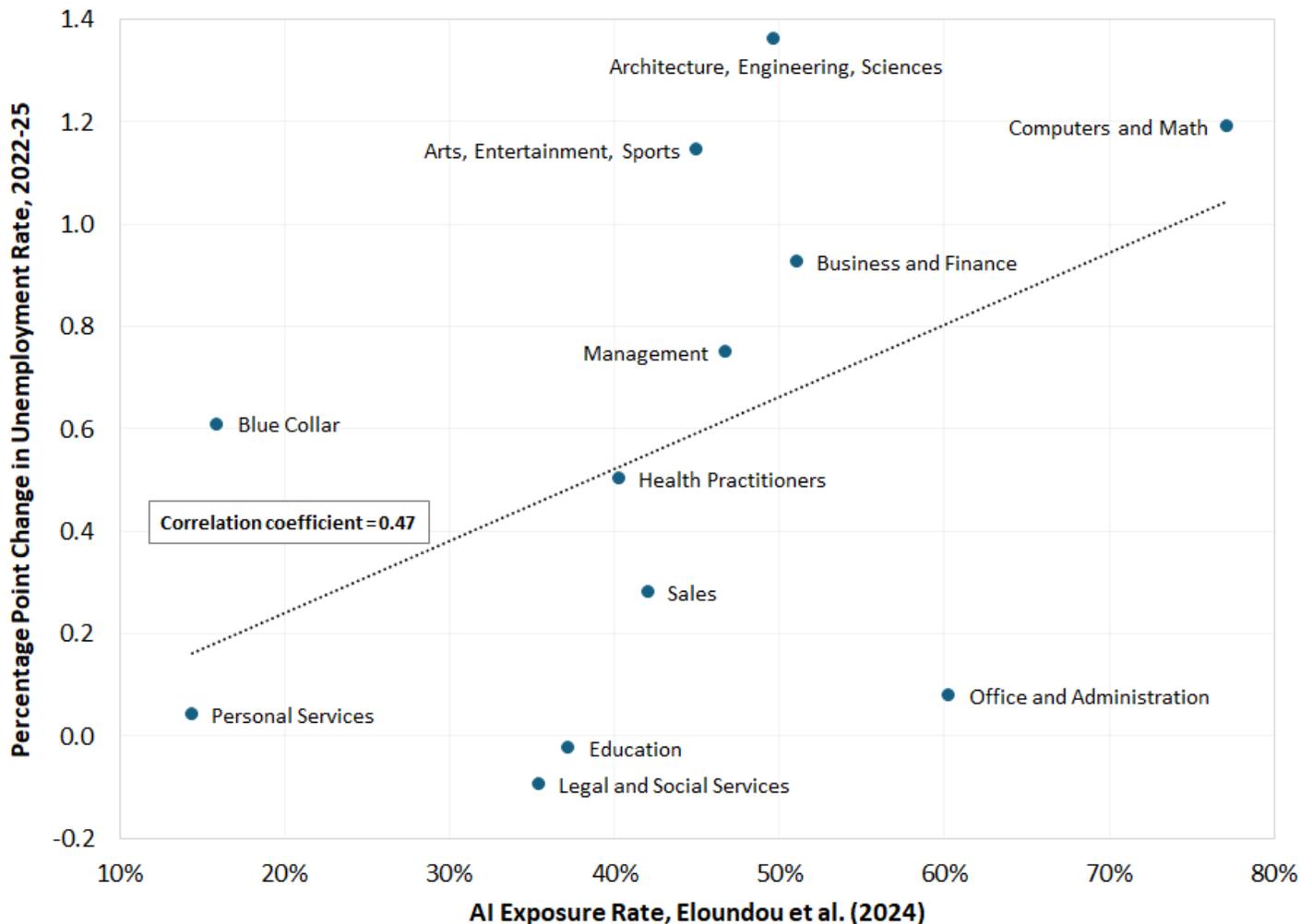
By [Serdar Ozkan](#) , [Nicholas Sullivan](#)

AI and Unemployment

Both measures reveal a striking correlation between AI's prevalence and unemployment increases since 2022.

The figure below shows that occupations with higher AI exposure experienced larger unemployment rate increases between 2022 and 2025, with a 0.47 correlation coefficient. We measured the percentage point change in unemployment using the three-month average unemployment rates for May through July in 2022 and 2025 to smooth out monthly volatility and control for seasonality in the data. Computer and mathematical occupations—predictably among the most AI-exposed, with a score around 80%—saw some of the steepest unemployment rises. Meanwhile, blue-collar jobs and personal service roles, which have limited AI applicability, experienced relatively smaller increases.

AI Exposure and Change in Unemployment across Occupations



■ FEDERAL RESERVE BANK OF ST. LOUIS

[Is AI Contributing to Rising Unemployment? | St. Louis Fed](#)

The integration of AI into the workforce has sparked intense debate, with evidence showing both job displacement and creation. Overall, while AI is automating certain tasks—particularly routine, repetitive, or data-heavy ones in white-collar sectors like software development, customer service, clerical work, and entry-level roles—there's no widespread mass unemployment yet. U.S. unemployment rates have remained relatively low and stable, hovering around 4.3% as of January 2026, compared to historical lows like 3.5% in July 1969 and 2022, or 3.4% in early 2023. The slight uptick from 3.7% in late 2023 to 4.6% by late 2025 (before dipping back to 4.3%) aligns more with broader economic factors, such as post-pandemic recovery and interest rate changes, than a direct AI-driven surge. However, targeted impacts are emerging: employment for young workers (ages 22-25) in highly AI-exposed occupations has declined by about 13% since late 2022, and recent college graduates face unemployment rates near 10%, partly attributed to AI reducing entry-level hiring in fields like tech and administrative support.

fred.stlouisfed.org +5 more

Recognised AGI (super AI) level

On the pessimistic side, studies predict significant disruption: AI could displace up to 12% of the U.S. workforce (nearly triple current unemployment), with estimates of 85 million global jobs lost by 2026 and up to 14% of roles automated, potentially pushing U.S. unemployment to 6%. Layoffs in 2025 (around 55,000 tied to AI) often stem from companies anticipating AI's potential rather than its current capabilities, exacerbating inequality as lower-wage, routine jobs in sectors like manufacturing, healthcare administration, and law face higher risks. Optimistic perspectives counter this, noting that AI-exposed jobs have grown by 1.7% post-2023, with companies adopting AI seeing 6% higher employment growth and 9.5% more sales. AI often augments tasks rather than replacing entire roles, creating demand for new skills in areas like AI development, data analytics, and oversight. Globally, AI could add 69 million jobs by 2028 through productivity boosts, and real wages in AI-heavy occupations have risen 3.8% recently. In balance, the net effect so far is modest—aggregate unemployment might rise only 0.5% during the transition—but concentrated on vulnerable groups like young, less-experienced workers and women in clerical roles. Public sentiment leans worried, with 52% of U.S. workers expressing concern over AI's future impact. fortune.com +12 more

The "hardest time" for AI-driven displacement is projected in the near term, likely peaking between 2026 and 2030 as generative AI (like ChatGPT and Sora) matures into more agentic systems that handle complex processes. CEOs and investors anticipate 10-20% unemployment spikes in 1-5 years, with half of entry-level white-collar jobs at risk, though this could be mitigated if AI adoption is gradual and creates offsetting opportunities. Broader economic growth from AI (e.g., 2.25% U.S. GDP in 2026) might stabilize labor markets, but social fractures could emerge if displacement outpaces retraining.

theatlantic.com +6 more



For general citizens, proactive adaptation is key—focus on building resilience rather than resisting change. Here's a practical breakdown:

Strategy	Details	Why It Helps
Embrace Lifelong Learning	Pursue online courses (e.g., Coursera, Khan Academy) in AI tools, data literacy, or emerging fields like AI ethics and prompt engineering. Aim for certifications like Microsoft Azure AI fundamentals reddit.com .	AI augments productive workers; those who integrate it become more efficient and indispensable reddit.com +2 more .
Develop Human-Centric Skills	Hone creativity, emotional intelligence, critical thinking, and interpersonal abilities through workshops or roles in service, healthcare, or education.	These are harder for AI to replicate; focus on jobs involving judgment, empathy, or complex problem-solving brookings.edu +3 more .
Be Adaptable and Versatile	Become a generalist by combining skills across domains (e.g., tech + business). Network, shadow professionals, or take gigs in the freelance economy.	AI shifts demand; versatility reduces vulnerability to single-role automation reddit.com reddit.com .
Build Financial Buffers	Save aggressively (aim for 6-12 months of expenses), diversify income via side hustles, and explore wage insurance or unemployment benefits if displaced.	Cushions transitions during potential job loss periods peoplespolicyproject.org reddit.com .
Advocate and Stay Informed	Support policies for retraining programs, portable benefits, and reduced job licensing. Track AI trends via sources like MIT or WEF reports.	Systemic changes (e.g., government aid) amplify personal efforts brookings.edu aiforgood.itu.int .

Ultimately, AI's effect mirrors past tech shifts (e.g., the space industry's role in low unemployment during the 1960s Moon landing)—it can drive innovation and growth, like the Artemis program did in 2022, but requires adaptation to avoid pitfalls. [investopedia.com](#)



18 sets of F-35 are flying to Middle East to join the USS Ford and USS Abraham Lincoln Strike Groups



AI's Impact on Key Industries in 2026

As AI technologies like generative AI (e.g., ChatGPT and Sora) and agentic systems mature, they're reshaping industries by boosting efficiency, enabling new capabilities, and sometimes displacing jobs. Based on recent analyses, AI's effects vary by sector: some experience rapid transformation with net job creation through productivity gains, while others face disruption from automation. Overall, AI is projected to add \$15.7 trillion to the global economy by 2030, with manufacturing potentially gaining \$3.8 trillion by 2035, but it could automate up to 85% of tasks in vulnerable roles. Here's a summary of impacts on specific industries, drawing from 2025–2026 reports: [nu.edu](#) [medium.com](#)

Industry	Positive Impacts	Negative Impacts/Risks	Projected Timeline/Scale
Healthcare	AI accelerates drug discovery, improves diagnostics (e.g., radiology accuracy up 70%), personalizes treatments, and closes global health gaps via predictive modeling and virtual assistants news.microsoft.com +2 more . High adoption of agentic AI for patient support and R&D deloitte.com .	Displacement of diagnostic specialists (e.g., radiologists, pathologists); ethical concerns over data privacy and bias in AI decisions medium.com .	Transformation 70% complete; expected to shrink health disparities by 2026, with AI contributing to 25% higher global growth news.microsoft.com nu.edu .
Financial Services	Automates trading, fraud detection (saving billions), underwriting, and customer service via chatbots; agentic AI handles invoice processing and anomaly detection, freeing staff for strategic work pwc.com +3 more . Unified data platforms boost margins youtube.com .	90% reduction in entry-level analysts and 70% in underwriters by 2026; legacy system overhauls disrupt operations medium.com youtube.com .	85% transformed; tipping point in 2026 with AI-native platforms replacing old systems medium.com youtube.com .
Manufacturing	Predictive maintenance, collaborative robotics, and smart materials enhance efficiency; AI optimizes supply chains and product design deloitte.com +2 more . Electro-industrial stack scales production youtube.com .	Automation displaces routine jobs; high vulnerability to disruption luthresearch.com nu.edu .	Major gains by 2035 (\$3.8T); peak disruption in 2026–2030 as AI adoption surges luthresearch.com nu.edu .

Recognised AGI (super AI) level

Retail	Hyper-personalization, demand forecasting, and IoT-driven inventory management; AI agents improve customer support pwc.com +2 more .	Job losses in sales and admin; consumer behavior shifts challenge traditional models luthresearch.com .	Most vulnerable sector; explosive potential in 2026 with AI reshaping e-commerce luthresearch.com linkedin.com .
Transportation & Logistics	Autonomous vehicles, route optimization, and predictive logistics reduce costs; AI enhances safety in aviation and construction luthresearch.com productschool.com	Displacement of drivers and warehouse workers; regulatory hurdles for autonomy luthresearch.com .	Impending disruption; AI boosts efficiency by 2026, with sectoral shifts adding 0.04% to aggregate growth luthresearch.com budgetmodel.wharton.upenn.edu
Technology, Media & Telecommunications	Agentic AI for content generation, search, and cybersecurity; high adoption (over 90%) enables innovation in software and enterprise systems deloitte.com mckinsey.com . Sora-like tools transform media production.	Slowed job growth in tech occupations; programmers and admins at high risk goldmansachs.com .	Leading in AI use; agent layers overtake traditional systems by 2026 youtube.com mckinsey.com .
Energy & Climate	AI optimizes power grids, batteries, and clean generation; drives sustainability through demand sensing and emissions reduction pwc.com weforum.org . Ties into space industry via data analytics for missions.	Potential energy burden from AI data centers; uneven benefits across regions pwc.com .	Boon for sustainability in 2026; real-world impact via MINDS programs pwc.com weforum.org
Legal & Professional Services	AI assistants for research, document review, and compliance; boosts productivity in knowledge management deloitte.com goldmansachs.com	High displacement risk for legal assistants, proofreaders, and credit analysts (up to 70% in junior roles) medium.com goldmansachs.com	Significant upheaval; AI exposure leads to sectoral growth but job shifts budgetmodel.wharton.upenn.edu goldmansachs.com

Recognised AGI (super AI) level



xAI Grok Grok - xAI The World's Most Powerful AI

These impacts reflect a broader trend: AI adoption is at 88% across enterprises in at least one function, up from 78% last year, with agentic AI leading in customer support, supply chains, and R&D. While near-term job displacement is evident (e.g., in admin and entry-level roles), long-term projections show net job gains (97 million created vs. 85 million lost by 2025). For citizens, as discussed previously, upskilling in AI integration and human-centric roles remains crucial to navigate these changes.