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Weekend bliss is always fleeting. I hope you had the chance to enjoy it with your family and found, within those quiet hours, a renewed sense of strength—ready to return to your work, and to the pursuit that genuinely inspires you.

Good morning, folks.

Welcome back. Our community forum remains committed to the shared discovery of actionable, data-driven perspectives in the evolving world of quantitative intelligence.

In October 1929, at a street corner in Lower Manhattan, a shoeshiner named John turned to a well-dressed banker and asked, “Sir, are you still holding railroad stocks? I just bought three lots yesterday.”

The banker paused. He said nothing.

He looked down, reflected briefly, and walked back to his office.

There, he quietly liquidated his entire equity position.

Three days later, the Great Depression began.

Overnight, Wall Street descended from exuberance into ruin.

But neither the banker nor the shoeshiner was the true protagonist of that moment. It was the individual who, in the midst of euphoria, could still hear the sound of warning bells.

He didn’t predict the future—but he remained lucid while others surrendered to illusion.

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Today, I may not see you seated in front of the screen in an Armani suit, whether tuned in via your computer or your phone. But in essence, much like that banker in 1929, you are standing squarely at the center of a storm—one driven not by markets, but by human nature itself.

The essence of wealth is not about how many times you’ve correctly predicted the future. It lies in choosing integrity amid uncertainty, staying disciplined through long nights, and honoring the rules even when no one is watching.

True excellence—is not defined by stumbling into a lucky windfall. It’s forged through ten downturns, five rounds of being

misunderstood, and perhaps three brushes with collapse—yet still choosing reason over reaction, focus over distraction, and time-tested principles over short-term noise.

This path resembles driving through a snowstorm: visibility is limited, the road is treacherous, and still, you must trust the steering wheel and the judgment you’ ve trained over years.

Today, I’ m not here to flaunt success. I’ m here to share something far more enduring: on the journey of wealth, the moments that truly resonate are not the victories, but the quiet resolve of those who rise and take one more step after every fall.

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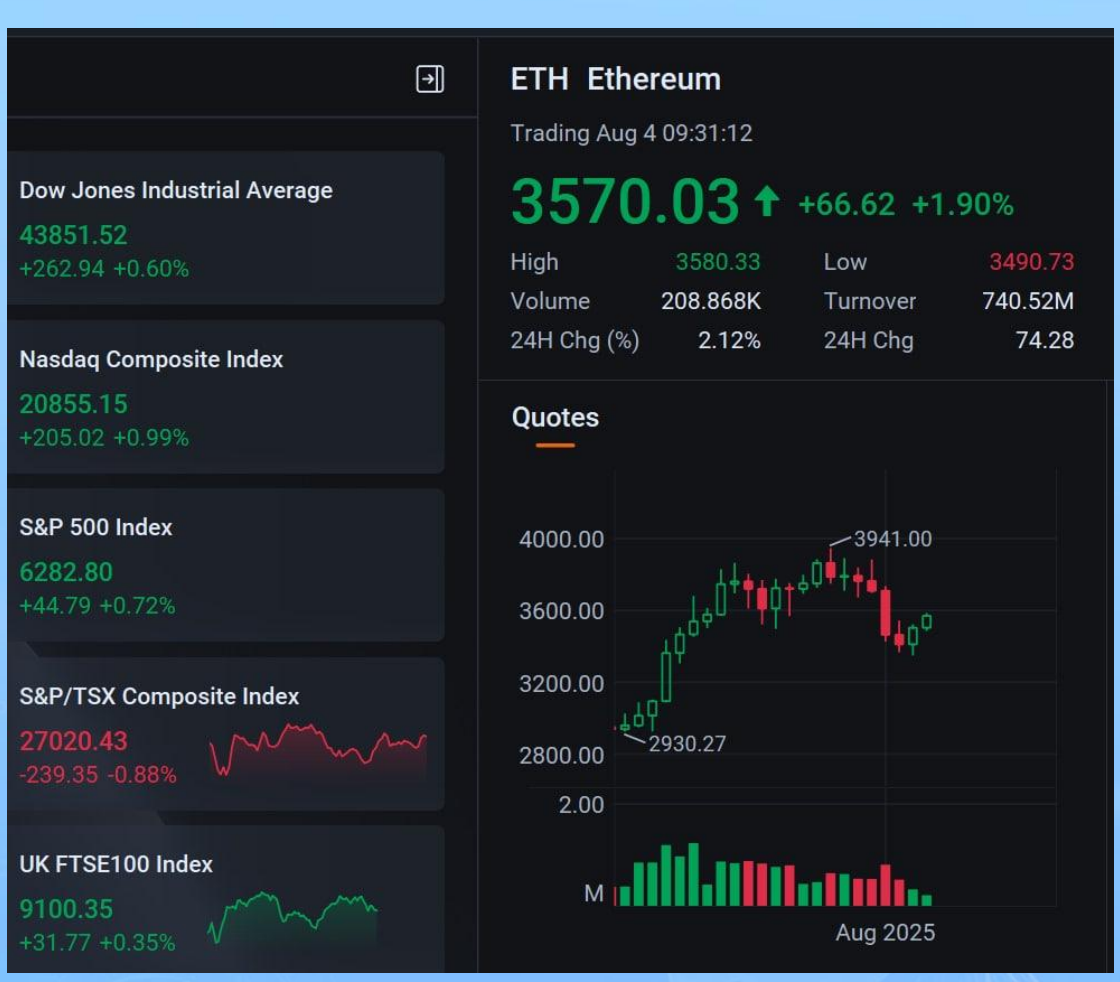

The pursuit of wealth has never been a linear sprint.

It is, at its core, a profound reckoning with human nature—an unrelenting test of mental endurance and emotional discipline.

In our U.S. equity markets, each trade, each fluctuation, replays this very narrative. What we confront is not merely a stream of earnings reports or technical signals, but the deeper forces within us—greed and fear, pride and bias.

Those who amass fortunes during bull markets often find

themselves unmoored when the cycle turns. It is those who remain composed in moments of panic—who position themselves deliberately when others retreat—who ultimately endure as true winners.

We saw this again over the weekend in the cryptocurrency markets. Following Friday’s sharp pullback, the market revealed its global character—marked by an almost primal appetite for liquidity and momentum—and we witnessed a rebound in ETH/BTC.

This, precisely, is why I continue to urge a steady and forward-looking approach to accumulation.
In environments defined by noise, conviction—measured and informed—is our greatest edge.

Naturally, we look to Monday’s market movements for answers—both to identify where future investment shifts may occur, and to better understand how to navigate the current landscape with clarity.

By observing the pre-market trends of the three major U.S. indices—using the S&P 500 futures (.SPX) as a reference—we can clearly see a rebound. This suggests that the wave of panic selling on Friday has begun to ease.

So one can’t help but ask: Why did Friday’s unexpectedly weak nonfarm payroll report trigger such an irrational spike in fear?

The reason is, in fact, quite simple.

A significant downside surprise in economic data points to a notable shift in the labor environment. When the public places its

confidence in government-released figures, such surprises naturally raise concerns about the trajectory of economic growth.

And because U.S. equities so often serve as the country’s most immediate economic barometer—“thermometer”—we witnessed a sharp uptick in fear-driven sentiment and a wave of broad-based selling.

But a declining market always reveals two sides: for some, it opens a window of opportunity; for many more, it sharpens their sense of risk.

As the brief story I shared earlier suggests—my goal is not to predict the future, but to manage the present with clarity and discipline.

To stay aligned with the rhythm of the market, and to preserve sound judgment.

Well, guys, I trust many of you are approaching the markets as I do—and in doing so, perhaps you’ve found a more grounded and reassuring path forward.

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Looking at key developments over the weekend, I noticed two particularly important signals:

First, Trump’s tariff policy appeared to gain broad-based agreement, offering a degree of policy certainty.

Second, several major tech firms posted AI-related earnings that exceeded expectations—restoring the market’s appetite for repricing growth.

As a result, leading stocks in the pre-market session reignited bullish sentiment, providing new momentum for the long side.

At the same time, Friday’s nonfarm payroll report offered a more optimistic backdrop for those betting on a rate cut in September.

The market narrative shifted—from Friday’s anxiety, to a sense of stabilization over the weekend, and now into a constructive rebound as Monday unfolds.

Looking again at the Fear Index, it's not difficult to observe that the sharp drop in pre-market trading led directly to a lower open.

Therefore, it’s essential to apply the correct trading rhythm when

using the index’s ETF. Before major events or key economic data are released, take advantage of the upward expectation driven by market anxiety—position early.

Once the data is out and the market finds a new basis for pricing, any gains from the index’s rise as a hedge must be locked in promptly. Delay leads to missed timing.

If you're unable to master this, I encourage you to read through my commentary carefully and mark its practical applications.

So what important events could influence the market this week?

1. PLTR, AWD
2. Disney, McDonald’s

These earnings reports could trigger some level of market movement.

Still, for early August, I remain optimistic in tone and continue to guide toward a buy-the-dip strategy.

Wasn’t the unexpected weakness in the nonfarm payroll data

supposed to signal downside risk to growth? Even raise concerns about a potential recession? Then why maintain a bullish outlook for early August?

The answer lies in the primary drivers of this cycle: strong earnings from tech companies, rising expectations for rate cuts, and a gradual resolution on tariffs.

Taken together, these factors suggest that the impact of the payroll surprise on U.S. equities may be limited—or may even reinforce the case for policy easing.

In my view, U.S. markets are likely to resume their upward trend, supported by continued strength in the tech sector.

In the crypto-linked equity space, names like MSTR / HOOD have technically entered oversold territory, with potential for a short-term rebound.

Following the implementation of the Genius Act, we may see greater institutional capital flowing into the crypto ecosystem, supporting a more constructive long-term view on blockchain-related assets.

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Last Friday’s decline in equities was driven more by sentiment than substance.

Today’s market is likely to focus on stabilization and recovery.

That said, near-term price action still requires another day or two of observation before any decisive moves should be made.

Of course, my optimism is not blind. I remain anchored in facts. Although President Trump has suggested that the Labor Department’s employment figures may be doctored, both the market and I accept the data as given.

The truth is, the potential future impact of tariffs remains largely

unpriced, which means the risks in late August and September will be the most concentrated.

Accordingly, I intend to adopt the safest trading stance through mid-to-late August, reserving any increase in equity exposure until more favorable opportunities present themselves.

So, what should we watch for this week?

Certainly, the dip in nonfarm payrolls has sharply increased the odds of a Federal Reserve rate cut in September. The market is now fully pricing in two cuts by 2025, which should improve liquidity. Yet, we believe these positives are limited, and the underlying economic downside remains the true cause for concern.

Meanwhile, President Trump’s deployment of nuclear submarines as a signal to Russia has heightened geopolitical risks substantially. At present, this impact is contained. The fog surrounding the Russia-Ukraine conflict persists, especially with the imposition of secondary tariffs on Russian energy imports. Whether Russia will respond with escalatory measures remains uncertain.

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All three major index futures have shown a healthy rebound in pre-market trading. There’s a reasonable chance the Dow Jones may fill Friday’s gap. That said, the S&P 500 could very well oscillate between 6200 and 6400 throughout the week.

Meanwhile, I continue to monitor the performance of our Quantitative Strategy Portfolio, anchored in the【AI Center + Crypto Capital】 dual-hub model. Particular attention is being given to participation in selected IPOs, positioning them as a new and distinct class within the broader portfolio.

Naturally, the true value of any IPO lies in the fundamental quality of the underlying company. Without that, the risks—both structural and reputational—are nontrivial. Distinguishing those companies worth entering at issuance has become a central theme in my August research agenda. I invite you to follow the upcoming briefings closely.

History may not repeat itself, but it often rhymes. And August’s second week this year bears a striking resemblance to that of last year. I highlighted this pattern last Friday.

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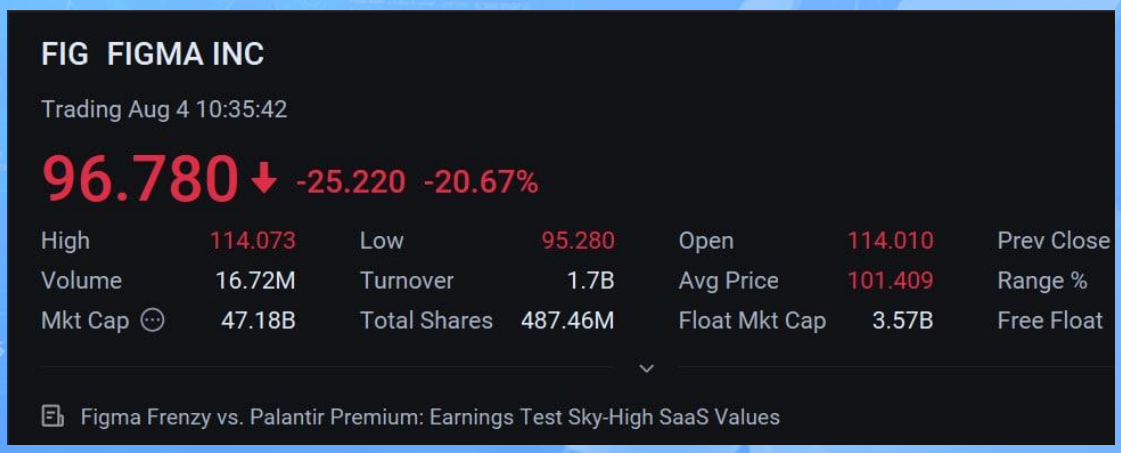
At present, select equities in the AI Center portfolio—specifically DUOL / CRWV—are rebounding, now entering an accelerated recovery phase.

Should these names fail to reach profitability by Friday, August 8th, they will trigger our compensation-backed verification protocol, in accordance with the previously stated $2,000 valuation benchmark. Please reach out to my assistant to complete the formal claim process.

Let’s watch how the week unfolds. As of Monday, the market tone appears to be gradually improving.



However, the underperformance of CRWV and the pullback in CRCL were both impacted by Figma’s status as a newly listed stock.

Indeed, when the market prices assets with similar profiles, it often employs comparative valuation strategies across peer names.
As a result, these stocks fell into the category of lagging rebounders on Monday.

Looking specifically at Figma’s price action—it continued to decline today, dropping over 18%.
Does this not validate every one of my warnings, analyses, and strategic notes from last week?

Let's revisit the key takeaways I emphasized in last week’s Figma Trading Guide:

1. During the IPO phase, participating in the initial subscription offers the greatest margin of safety and cost advantage.
2. A strong rally on the first trading day should not be mistaken for an entry signal—it often marks the beginning of a risk-unwinding window.
3. Declines on day two and three have confirmed the trajectory I anticipated.

Folks, I am not a shareholder of this company, nor do I represent

any underwriting bank. But I have identified the underlying code of this IPO-driven market cycle. Have you seen these patterns unfold?

Let's now turn to a deeper examination of Figma. Why has such a high-growth, widely celebrated company experienced a valuation contraction following its public debut?
Who, then, is selling?

As of now, the company is trading at a market capitalization of $48.7 billion. According to Acumeta's framework for fair market pricing, a more reasonable valuation would fall in the range of $25 to $28 billion. This range clearly represents what can be considered a fundamentally sound zone for acquisition. Correspondingly, the stock would be fairly priced between $35 and $50 per share.

Naturally, one would find it difficult to acquire shares at that range in the secondary market today—just as one rarely finds a popular limited-edition pastry at a five-star hotel offered at its base value. Listed at over $58 a slice, it is often there to be admired, not consumed.

In that sense, Figma resembles precisely such a delicacy.

Under such market dynamics, driven by stretched valuations, the logic for a sell-off becomes inevitable.

So, amid the early-stage sell-off of Figma, who stands to benefit—and who, perhaps, is simply reacting in panic?

A closer examination of Figma’s trading activity reveals a telling detail: while the company’s total market capitalization hovers around $48 billion, its free float—the portion of shares actively trading—is merely $3.6 billion. This indicates that less than 10% of Figma’s equity is currently in circulation.

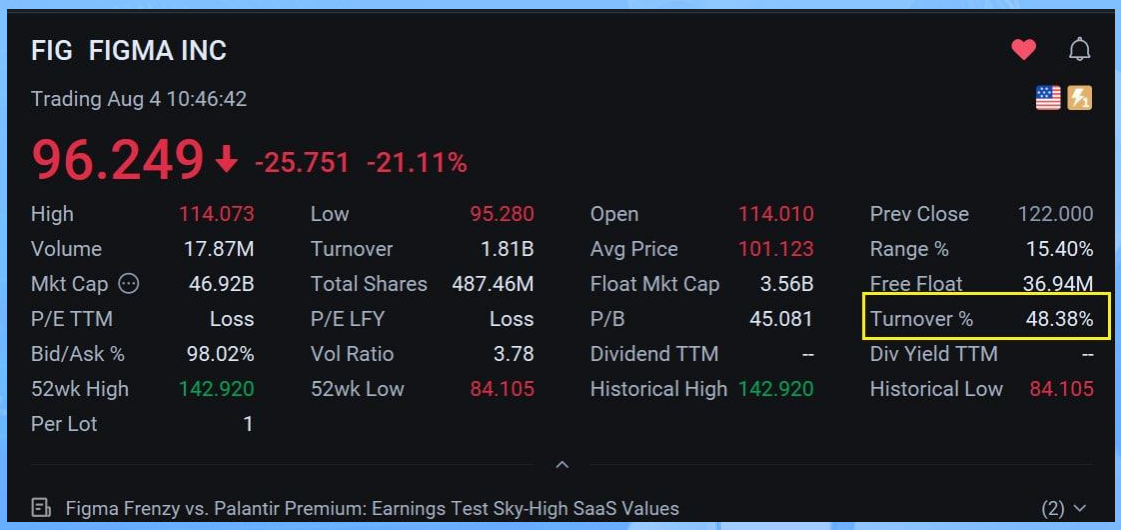
In other words, the shares being sold into the market following the IPO originate almost exclusively from allocations made during the subscription phase.

More importantly, these circulating shares—all within that sub-10% tranche—were acquired at a cost basis around $33 per share. A distinct structural advantage.

Now, has your account been credited with any of those allocations?

If not, in the next section, I’ll explain precisely why that might be.

Returning to the current free float: the vast majority of Figma’s shares remain under lock-up. It follows logically that most of the active trading is driven not by institutional repositioning, but by retail holders. A brief glance at turnover ratios makes this abundantly clear.



Turnover, quite simply, refers to the act of trading—when one investor buys, another sells.

As of this morning’s session, Figma’s trading data revealed a

turnover rate of 42%. That is to say, 42% of the shares allocated both before and after the IPO have already changed hands in today's market.

Who stands to benefit most from this volume? Without question, those who acquired their shares at the $33 auction price during the subscription phase.

That price point represents the most secure margin of safety.
By contrast, the cost basis for shares acquired post-listing is what I refer to as a "fear premium."
Because whether the cost basis is $85, $95, or $125, each carries with it a heightened sense of fear—these are the entry points most prone to anxiety and emotional vulnerability.

So now the question is clear: do you wish to be on the side of durable advantage—the beneficiary of the strongest moat?

It's Monday. So what triggered this wave of selling in Figma today?

First, it was the release of high-quality, early-stage profit-taking—yes, from those who entered during the subscription phase. Even as you read this now, many of those positions still hold gains in excess of 300%.

That is a substantial cushion of profit. Even if you didn’t lock in the peak return of 450%, sitting on a 300% gain at this stage is still a generous buffer—what one might call a rich layer of margin.

It’s not unlike a perfectly aged steak, served with quiet ceremony. There it lies before you—tender, glistening, exquisitely marbled—awaiting your knife and fork to carve open its subtle richness. The aroma rises, the texture gives, and the flavor lingers. It is, in a word, indulgent.

Second, panic. Let’s be clear—Figma’s initial post-IPO surge was not driven by institutional conviction. It was driven by FOMO. From the outside looking in. From those who couldn’t get an allocation. From those who were shut out and came rushing in.

It was these latecomers, driven by emotion rather than insight, who

helped fuel the euphoria—only to find themselves, today, among the most painful casualties of the pullback.

Understanding Key Concepts: What Is FOMO Buying Power, and What Are Figma’s Lock-Up Shares?

FOMO = Fear of Missing Out.

At its core, FOMO is a behavioral impulse—akin to the roaring frenzy of a Super Bowl crowd. It has the power to ignite market momentum, but just as swiftly, to precipitate steep declines.

This fear arises from the anxiety of missing out on a perceived windfall. Investors, often influenced by headlines or peer sentiment, rush to buy high or sell low—not unlike someone chasing the last limited-edition beer at a backdoor party. It is reactionary, not rational.

FOMO resembles the collective euphoria of a stadium crowd. When a stock like Figma captures public imagination—amplified by social media as “the next breakout”—investors often feel compelled to

act quickly, not thoughtfully. They pile in, like shoppers storming a Thanksgiving doorbuster sale.

This behavior fuels demand, sending share prices soaring like a well-timed quarterback pass.

And yet, rallies driven by FOMO are rarely grounded in fundamentals. They are fragile by nature, vulnerable to abrupt reversals—much like an overinflated bubble.

2. Understanding Figma’s Lock-Up Shares:

An IPO is like a grand party.

The insiders—the founders, early employees, executives—and the early investors, such as venture capital firms, are the main players at this gathering.

They hold substantial amounts of stock, acquired at very low prices before the company went public, when risks were still high.

If these key players were to unload millions or even tens of millions

of shares on day one of trading, the market would be flooded with sell orders, causing the stock price to plummet—and new investors would bear the brunt of the losses.

To prevent such a scenario, U.S. markets enforce a 180-day "lock-up period." During this time, these insiders are prohibited from selling their shares.

What exactly does the U.S. stock market's lock-up rule protect?

At its core, this regulation is designed to safeguard everyday investors and uphold market stability and fairness.

Preventing price crashes: The lock-up period ensures that a large volume of shares doesn't flood the market right after the IPO, thereby averting massive sell-offs and preserving price stability.

Building market confidence: It sends a clear message that insiders and early investors have faith in the company's long-term outlook—they're willing to hold their shares rather than rush to cash out.

This fosters trust among regular investors.

Reducing market manipulation: The lock-up period also prevents insiders from exploiting their information advantage by dumping large blocks of stock early on to manipulate the price.

From last week until now, Figma’s stock has offered us a prime example through which we’ve gained a comprehensive understanding of IPO subscription dynamics. Do you appreciate this hands-on knowledge framework and its real-world application?

Of course, Monday’s market showed some corrective volatility, so amidst the rebound, some choppiness is inevitable. Accordingly, Figma’s IPO characteristics will gradually be re-evaluated by the market over time. Stablecoin stock CRCL, therefore, should not remain suppressed indefinitely.

Market pricing will ultimately return to the intrinsic value of the stock and the space it has to create worth.

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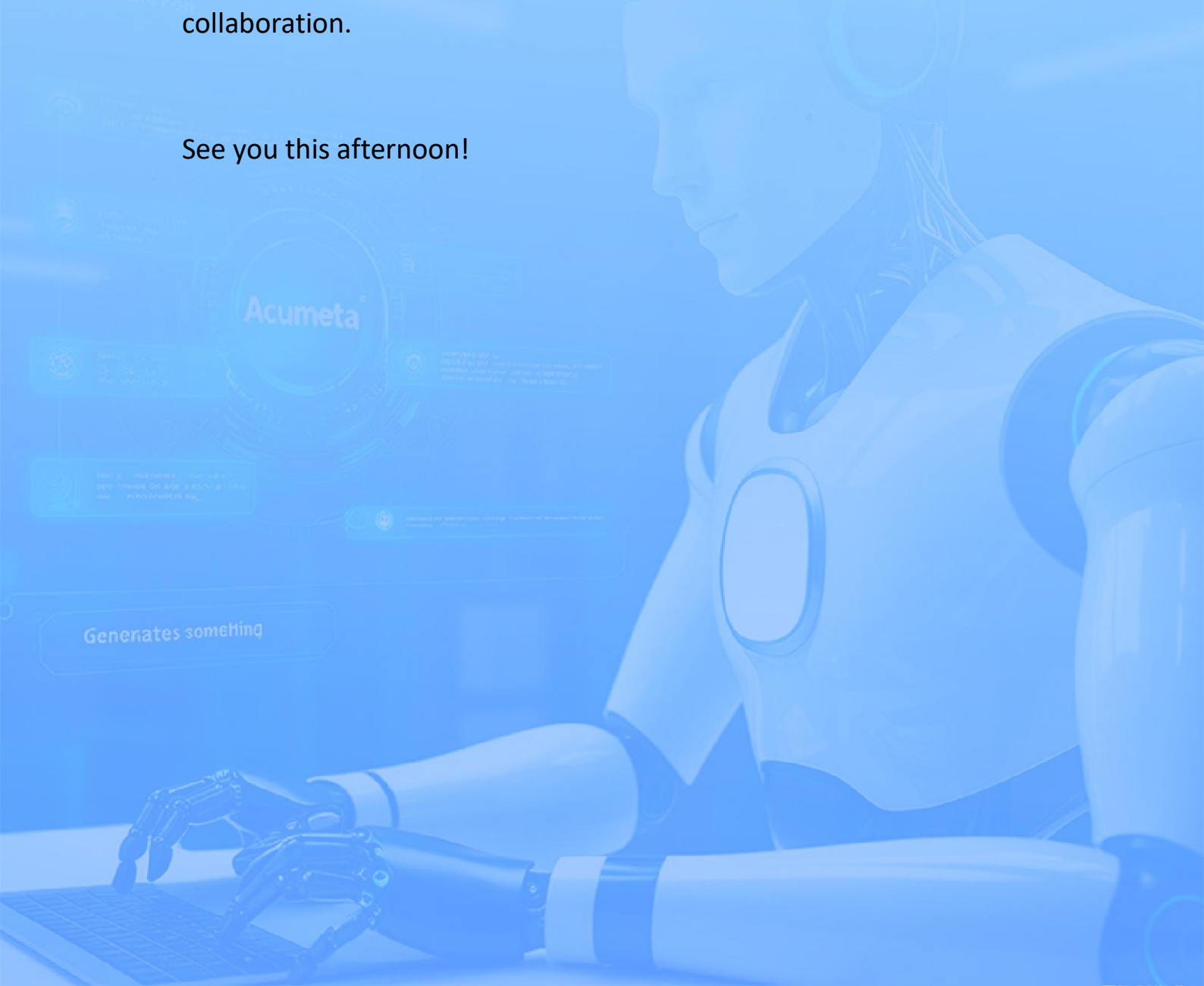
As for the potential future outlook of cryptocurrencies and their connection to the September rate cut guidance, we’ll continue that exploration in this afternoon’s session.

Folks, the essence of trading lies in the clear distinction between surface phenomena and underlying reality. I am always here on the program to help you uncover the true nature of profitable opportunities—as long as we commit to honest, long-term collaboration.

See you this afternoon!



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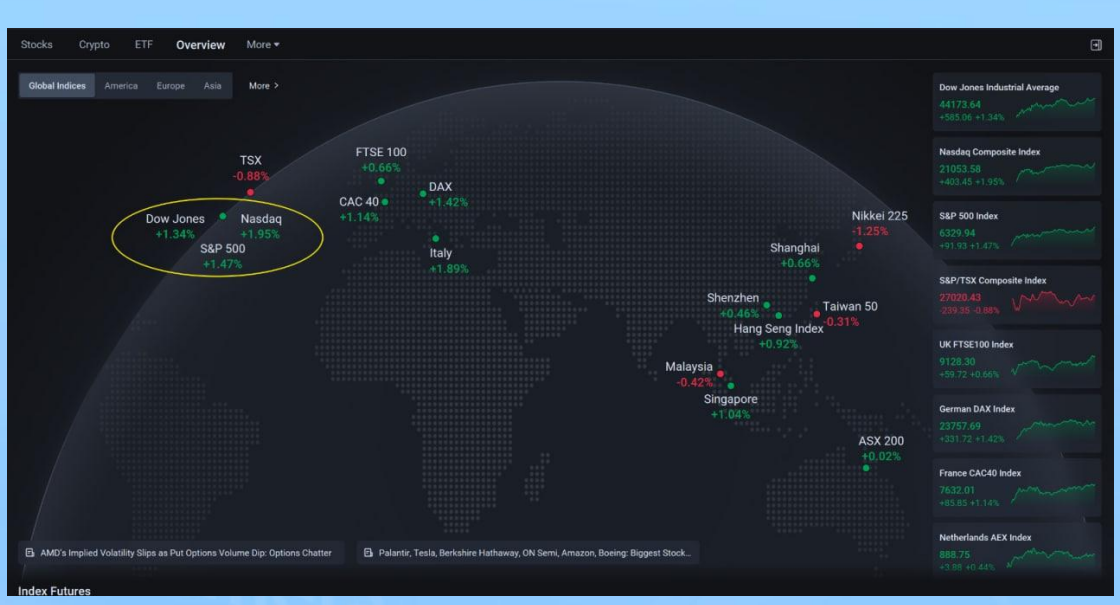

It was an extraordinary Monday—an upswing I had anticipated. But does that alone make for sound investing?

Folks, let’s return here and examine the more compelling trades that unfolded this afternoon.

When Friday’s closing bell rang, the market was shrouded in despair. The fear index erupted like an untamed volcano. And yet, I must tell you—this is precisely when I set out to help you find opportunity.

Think back to the pioneers in our own American history.

When they stood before the barren expanse of the West—when most saw only endless desert and unknown danger—the true explorers recognized the gold and oil hidden beneath the harsh soil.

They were not paralyzed by the despair in front of them; they understood that opportunity often emerges in the very places others have abandoned.

They did not move forward on bright, easy days. Their journeys began in the hardest moments—on the very edge of the storm.

The U.S. equity market is no different.

We cannot afford to join only when prices are soaring and the crowd is in full celebration.

True discernment lies in staying clear-eyed and composed when others are in despair—when the fear index spikes—to recognize quality assets that have been unjustly punished by sentiment.

Stocks sold off in a wave of short-term panic are like treasures abandoned on the Western frontier.

Their fundamentals remain intact; they are simply obscured by the fog of emotion.

That is why last Friday’s despair was no reason to retreat.

On the contrary, it offered us a rare moment to act in the spirit of

the pioneers—to seek out the “gold” undervalued in the heat of market fear.

Much like taking part in the [Win the Race for Reserve Digital Token Challenge], it is a commitment with a distinctly rewarding promise.

My buy-the-dip principle has proven itself once again.

But that alone is no reason for me to be satisfied—because I know the truly valuable content we share here goes far beyond that.

Guys, let’s take a look at today’s performance in U.S. equities and distill it into a few essential, clear takeaways.

By the close, all three major U.S. indices posted an encouraging rebound.

Take the S&P 500 (.SPX) as an example: the candlestick chart shows a recovery that closed the gap created by Friday’s sharp opening

drop.

Such a move reflects a correction of Friday’s mispricing by the bulls—and suggests a constructive, upward bias for the week ahead.

As I anticipated this morning, the market is now focused on pricing in an optimistic outlook for a September rate cut and monetary easing.

President Trump offered little commentary on Monday, while a measured easing in trade policy helped to underpin risk sentiment.

Post-close, Mary Daly of the Fed signaled that the path ahead remains fluid: the Fed may not deliver two rate cuts, or it could opt for more if conditions warrant. That nuance was quickly absorbed by markets—after-hours trading turned notably more constructive, suggesting a firmer open for equities on Tuesday.

It is worth noting that the benefits of monetary easing are not evenly distributed. From an equity-market perspective, small and mid-cap enterprises typically see the earliest impact. This was reflected in Monday’s performance, where the Russell 2000 index,

a proxy for this segment, outpaced the broader benchmarks.

From another vantage point, gold remains a time-tested store of value. Its appeal is rooted in wealth preservation, a practice embedded in family balance sheets for centuries. In a rate-cut cycle, adding physical gold to long-term reserves can be prudent. However, its limited liquidity makes it less suitable as an instrument of exchange—its primary virtue lies in safeguarding purchasing power over time.

Among our AI Center holdings, DUOL / SOUN / CRWV stood out in particular.
For those currently holding these positions, there may be some short-term losses, yet such fluctuations do not alter their standing as well-run companies with a solid presence in the AI applications space.

Similarly, the performance of growth-oriented technology ETFs—most notably IWY—remains noteworthy.
It reflects the broader growth trajectory of the AI technology sector,

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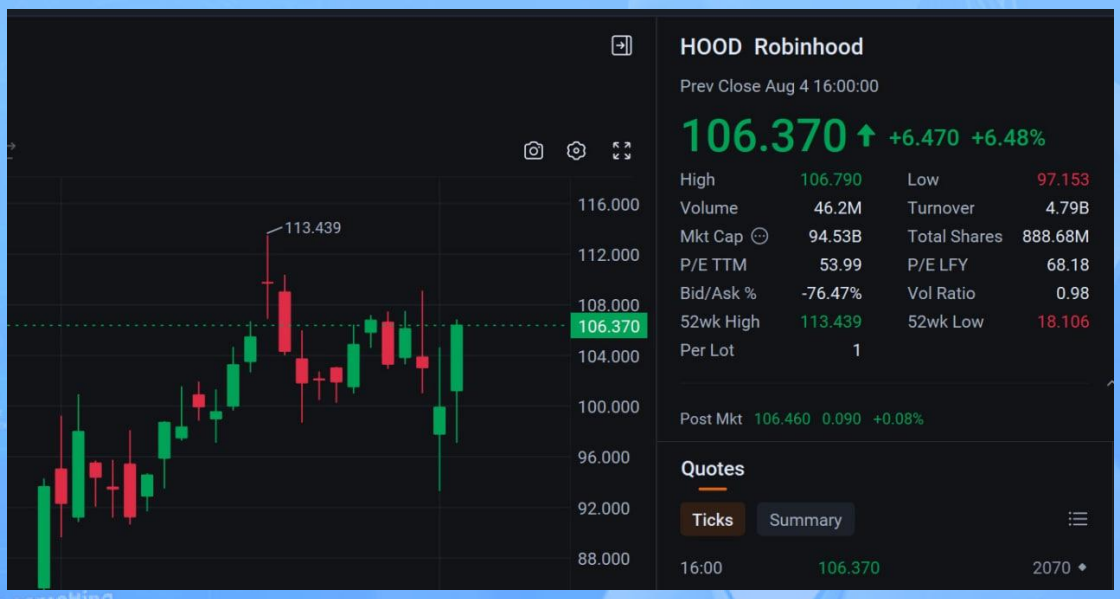
which is now in a profit-accumulation phase and may deliver highly efficient returns.

This allocation remains a cornerstone of my quantitative strategy portfolio.

So, if there are concerns, they are unnecessary. These positions should show improvement by Friday.

Please ensure your trade details and records are maintained, and coordinate closely with my assistant.



What is the real beneficiary of rate cuts?

It is the cryptocurrency sector.

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That is why we saw a standout performance on Monday from related names such as HOOD / MSTR.

As two of the most representative stocks in the space, I often use them as case studies when analyzing value and future potential.

HOOD, as a platform serving crypto + equity markets, now finds itself at the forefront of an unprecedented wave of stock tokenization in the U.S.

You may not yet have experienced it firsthand, but this top-down tokenization movement is entering a period of remarkable momentum.

From both Congress and the federal government, the industry is enjoying what can only be described as a rare and favorable honeymoon phase—much like the way America, in the 1990s, gave the internet the recognition that fueled a historic technology boom.

You should understand—prior to this year, or more precisely before July 2025, cryptocurrency had never held such a prominent position in the U.S.

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Why is that?

Because it lacked legal recognition.

That changed in July, driven by the momentum of our "Bitcoin President," Donald Trump, and the active advocacy of his Cabinet. Cryptocurrency received multiple green lights at the legislative level.

Most notably, three landmark crypto bills were successfully enacted—providing clarity not only for the U.S. but for the world at large:

1. They defined how cryptocurrencies are to be regulated and classified, while removing key regulatory barriers.

2. They affirmed that blockchain is the underlying foundation of digital assets, and established the legal primacy of stablecoins used in core transactions—positioning USDC as the most favored and legitimate choice globally.

3. They prohibited the Federal Reserve from issuing a central bank digital dollar, effectively reserving market attention for Bitcoin, Ethereum, and USDC.

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Do you see the full picture now?

It is precisely because cryptocurrency has received legal authorization and federal support that the reserve token initiative has come to life.

That’s why I have been so proactive in launching the [Win the Race for Reserve Digital Token Challenge].

Yes, don’t forget—this competition aims to identify the top five members holding the largest reserve token assets.

Whether BTC / ETH / USDC / USDT—any crypto asset qualifies.

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Those who qualify will receive an exclusive invitation from our “everyman” brand ambassador on the day Acumeta goes public globally.

Indeed, we aspire to ignite a movement that transforms the financial lives of ordinary people. This is the benchmark we hold ourselves to. It’s the very essence of what Acumeta strives for—making investment simpler and more trustworthy.

Enjoy the dividends of the AI era; embrace the new wealth gifts of the crypto age.

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Just as last Friday, when both the stock market and crypto markets plunged amid panic selling, I was the first to step forward and firmly advocate buying crypto tokens on the dip.

Well, like I said—being able to buy ETH below $3,500 felt like a clear sign from above, as if happiness itself was knocking on your door—so crisp, so moving, so extraordinary.

As it turns out, today, Monday, ETH continued climbing in after-hours trading, soon approaching the $3,700 level. The next target is $4,000.

Indeed, Acumeta’s forecast for this year calls for ETH to reach $8,000. You read that right. This is its future.

When the Christmas season arrives, perhaps what you’ll hear at your doorstep won’t be the jingle of reindeer bells, but the stirring sound of wealth flowing through on-chain assets.

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The most exciting crypto news over the weekend:

The U.S. SEC is actively promoting a Super-Apps model designed to create a unified platform where brokerages can offer a variety of crypto and traditional financial services under a single license—thereby avoiding regulatory fragmentation and fostering innovation.

This initiative is part of the SEC’s comprehensive reform plan, Project Crypto, aimed at establishing the U.S. as the global capital center for cryptocurrencies.

Through the Super-Apps model, brokerages will be empowered to provide a range of services under one license, including non-security crypto assets, crypto securities, traditional securities trading, as well as crypto asset staking and lending.

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The SEC emphasizes that their approach is to encourage innovation—not to constrain innovative firms with cumbersome regulations.

This landmark move is poised to propel HOOD rapidly toward a $100 billion market capitalization. The prices you see today are not the peak—there's still room for premium gains.

The SEC is advancing the modernization of securities regulations to support blockchain-based crypto trading—a move that comes at a time when enthusiasm for asset tokenization is running high.
The SEC Chair has stressed the importance of avoiding a "one-size-fits-all" regulatory approach that could drive crypto enterprises offshore.

To realize President Trump's vision of making the U.S. the global capital of cryptocurrency, the SEC must undertake a comprehensive assessment of the potential benefits and risks in shifting markets from an off-chain to an on-chain environment.

Tokenization refers to issuing digital certificates on a blockchain

network that represent publicly traded securities, real-world assets, or other forms of value. Token holders do not possess actual ownership of the underlying asset. The tokenization of each financial instrument marks a pivotal step in the technological transformation of the capital markets.

With tokenized stock services now open, the concept of a "Super-App" is being hailed as the Holy Grail of fintech—integrating payments, messaging, and social content to achieve a unified objective.

In this context, HOOD stands poised to become the new crown jewel of America's crypto sector.
Do you now see a different horizon?
With strong fundamentals in place, a short-term dip driven by restless voices—is it an opportunity, or a crisis? You know the answer?

So you see—the favored future of the crypto sector is not something I could have taught you in a day.

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It requires a conviction that comes from within, much like faith in the divine itself.

Wealth may be intangible, but every decision we make—every move we take—is tangible.

More often than not, what we miss stems from our own lack of confidence.

Come on, my friends—have courage. We will win the Crypto Token Reserve Challenge.

Today, CRCL was weighed down by Figma, yet it has already recovered from the slide, with capital quickly chasing the stock below $160.

You should know: CRCL’s market capitalization today stands at just $36.6 billion—yet it oversees $64 billion worth of circulating USDC. That means the company holds an equivalent $64 billion in U.S. Treasuries. Do you really think that doesn’t offer a formidable safety cushion?

At the same time, the yield from Treasuries—and the rising demand for USDC—can only expand the company’s earnings potential.

I trust that by now, you know the answer.

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The new era of crypto is not a slogan—it is a sweeping, undeniable movement of on-chain wealth creation.

It rewards those who are willing to seek new knowledge and embrace, with humility and clarity, God's will.

Believe in yourself—and act with courage.

- The law now affirms our right to hold and transact digital assets.
- The expectation of rate cuts in September provides a favorable macro tailwind.
- Participating in the Crypto Reserve Challenge reflects our conviction in acting before the consensus.
- From crypto equities to digital token spot holdings—we are not merely acquiring assets. We are positioning ourselves at the forefront of a generational shift in how value is stored, moved, and multiplied on-chain.

So yes, when you acquire more Quantitative Think Tank Center tokens today, you are not simply collecting slips of paper or digital snapshots. You are holding cryptographic signatures—keys—to

what will become tokenized balances in your wallet. And they will grow alongside my Quantitative Think Tank Center itself.

Much like NVIDIA’s stock rose in tandem with its silicon innovation, or how HOOD’s equity is being reimagined in a future shaped by tokenized equities and Super-App ecosystems—this, too, is part of that trajectory.

This is the sound of wealth in motion.
Wouldn’t you agree?

Well—my Quantitative Think Tank Center token is not just another crypto asset; it is a cornerstone project.
From the outset, my vision was to leverage a blockchain-based cryptocurrency, NQT, as a vehicle to secure funding for Acumeta’s research and development. Over the years, through consistent progress and on-chain integration, this token has drawn increasing attention from the market.

Of course, much of this momentum is the direct result of the active

participation of our entire community. The token vouchers you hold are not unlike subscribing to a best-selling loaf of bread at Walmart—there comes a moment when you can redeem it for the real thing. In essence, it is about bringing attention to an event before it fully unfolds.

Our decision to distribute token vouchers in community activities serves precisely this purpose: to give you the opportunity to become familiar with who we are, so that when a foundation of trust has been established, we can move forward together. That, to me, is not only a gesture of sincerity—it is also a safeguard.

Well—this Wednesday, we will officially launch the reservation program for token voucher redemption.

If you already hold token vouchers, I encourage you to stay closely engaged with our community programming, where you will receive detailed guidance on how to complete your reservation. This initiative is designed to foster a deeper dialogue with you—strengthening the Quantitative Think Tank Center’s capabilities in

the crypto space and, over time, developing strategies and insights that can help you achieve greater success in this field.

When you convert each token voucher into actual tokens in your wallet, every unit of market value it represents carries the full weight of your ownership. Later this week, I will also share how to interpret its future value potential.

It’s much like holding ETH today—you may not yet see it trading at $4,000, but you understand that day will come. That foresight is what defines future value. More importantly, it reflects a deeper comprehension and conviction in the enduring role of on-chain assets.

In today’s forum, we engaged in a deep and thought- provoking conversation around stock tokenization, asset tokenization, and even the tokenization of our own Quantitative Think Tank Center.

It is increasingly clear that a new era is quietly taking shape—one in which blockchain serves as the bedrock of trust for the next

generation of financial assets. And we, collectively, find ourselves in the very front row of this historic inflection point.

This is not merely a technological upgrade; it is a profound shift in social architecture and in the mechanisms through which wealth is created and transferred.

It calls to mind a chapter in American history: the great railroad expansion of the 19th century. Investors rushed to pour capital into railway companies, convinced they had found the final destination of financial freedom. Yet the quiet accumulation of the greatest fortunes belonged to those who bought the land along the tracks—individuals who looked further ahead, who saw not only the rail lines before them, but the roots of an entirely new economic ecosystem waiting to grow.

And today, tokenization is becoming that "railroad"—accelerating the flow of assets, making transactions more transparent, and flattening traditional structures.

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But those who will truly capture the dividends of the future are the ones who can see beyond the token itself, into the value networks and trust architectures it makes possible.

In an era when U.S. equities, real estate, fine art, and even the financial models of quantitative think tanks are being registered on-chain, anything with enduring value deserves to be redefined through tokenization. This is no longer a matter of technological adoption—it is a shift in perspective: those who can grasp the trust economy embedded within on-chain credit hold the key to participating in the new narrative of wealth.

We are not merely witnessing the birth of another tool; we are taking part in the civilizational upgrade of assets themselves. The future belongs to those who embrace the mindset of tokenization.

End-of-program knowledge quiz — with a gift for your answers:

1. Figma's surge and drop—was it within my forecast? Do you now know how to invest safely in an IPO?

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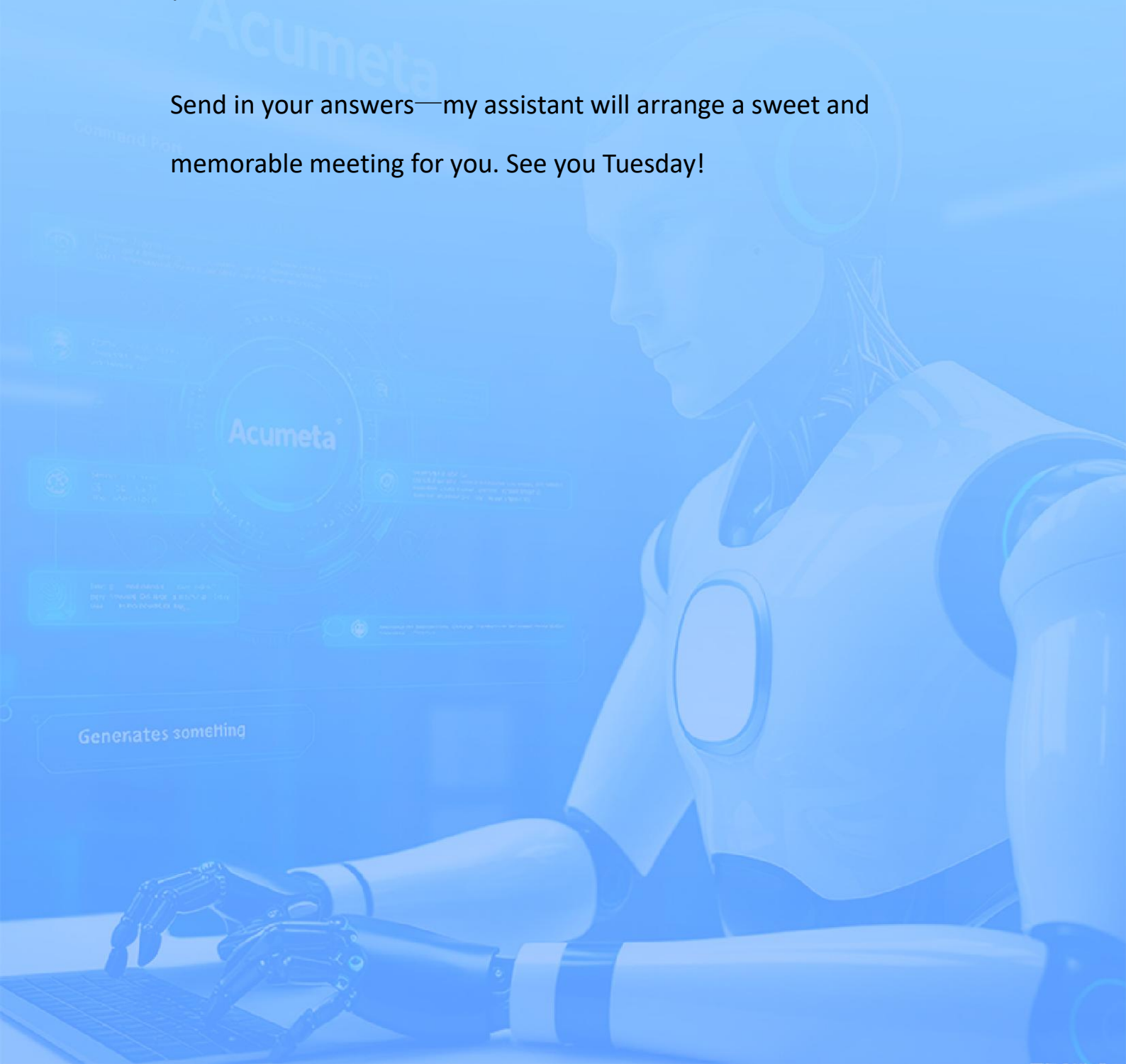
2. Do you believe there will be a rate cut in September? What investment strategies would you take in anticipation?

3. What tangible advantages has a tokenization mindset brought you?

Send in your answers—my assistant will arrange a sweet and memorable meeting for you. See you Tuesday!



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