



Morning Brief

US stocks edged higher — the S&P 500 ended +0.78%, while the Nasdaq finished +1.29%. On the safe-haven front, Gold climbed 1.52% to \$5,185.00, while the 10-year Treasury yield rose 2 bps to 4.08%, while the dollar strengthened (EUR/USD 1.1612). WTI crude rose 1.64% to \$75.78/bbl.

APAC markets closed broadly lower overnight, with ASX 200 leading at -0.98% and KOSPI lagging at -7.24%. European markets are trading higher. US futures are sending a mixed signal ahead of the open.

What This Means

Stocks edged higher yesterday. The S&P 500 was up +0.8% — a quiet positive session, nothing dramatic.

Gold surged 1.5% yesterday. Investors are moving into safe havens — a sign of caution.

Market-Moving Headlines

#	HEADLINE	SOURCE
1	Google's AI chatbot allegedly told user to stage 'mass casualty attack,' wrongful death suit claims	CNBC
2	Deflation and tariff-hit China reportedly sets lowest growth target on record at 4.5% to 5%	CNBC
3	Apple announces MacBook Neo, its most affordable laptop ever	CNBC
4	Bessent says global 15% tariff starts this week, predicts Trump duties will return to old levels later this year	CNBC
5	Trump officially nominates Kevin Warsh as Fed chair to replace Jerome Powell	CNBC
6	The U.S. is not the place to be for investors in 2026 so far. Where they are turning to for gains	CNBC
7	2 reasons why the market is rallying Wednesday and defying Iran war fears	CNBC
8	Democrats tread cautiously around another Trump impeachment after 'illegal' Iran strikes	CNBC

US Market Close

INDEX	CLOSE	DAILY %
WTI Crude Oil	75.78	+1.64%
Gold	5,185.00	+1.52%
Nasdaq	22,807.48	+1.29%
Russell 2000	2,636.01	+1.06%
S&P 500	6,869.50	+0.78%
10Y Treasury	4.08%	+2 bps
Dow Jones	48,739.41	+0.49%
USD Index	98.78	-0.28%

▲ Best: WTI Crude Oil (+1.64%)

▼ Worst: USD Index (-0.28%)

Overnight Markets

ASIA-PACIFIC (CLOSED)

INDEX	CLOSE	DAILY %	SESSION
Nikkei 225	56,279.05	-3.06%	Closed
Hang Seng	25,249.48	-2.01%	Closed
KOSPI	5,791.91	-7.24%	Closed
Nifty 50	24,480.50	-1.55%	Closed
ASX 200	9,077.30	-0.98%	Closed

EUROPE

INDEX	CLOSE/PRICE	DAILY %	SESSION
DAX	24,218.84	+1.80%	Early Session
FTSE 100	10,551.87	+0.65%	Early Session
CAC 40	8,174.76	+0.88%	Early Session
Euro Stoxx 50	5,873.67	+1.77%	Early Session

Currencies & Safe Havens

PAIR	RATE	DAILY %
EUR/USD	1.1612	-0.73%

PAIR	RATE	DAILY %
GBP/USD	1.3354	-0.42%
USD/JPY	157.7730	+0.33%
AUD/USD	0.7041	-0.92%
USD/CNH	6.8847	-0.44%
CHF/USD	1.2789	-0.41%

Pre-Market Futures

CONTRACT	PRICE	DAILY %
S&P Futures	6,895.75	+1.04%
Nasdaq Futures	25,218.00	+1.87%
Dow Futures	48,858.00	+0.61%
Gold Futures	5,184.90	+1.52%
10Y T-Note	112.70	-0.36%
WTI Crude Oil	75.78	+1.64%

What Moved Markets Yesterday

EVENT	ACTUAL	EXPECTED	PREVIOUS	SURPRISE
<i>No major events recorded.</i>				

Today's Watch List

TIME (EST)	EVENT	IMPORTANCE	EXPECTED
<i>No high-importance events scheduled today.</i>			

Positioning Notes

SIGNAL	SUGGESTED ACTION
No strong directional signals this morning	Maintain current allocations and watch for intraday cues.

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