



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 1.11% to \$5,177.00, while the 10-year Treasury yield rose 2 bps to 4.08%, while the dollar softened (EUR/USD 1.1617). WTI crude rose 2.54% to \$76.56/bbl.

APAC markets closed broadly higher overnight, with KOSPI leading at +9.63% and Hang Seng lagging at +0.28%. 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 1.1% yesterday. Investors are moving into safe havens — a sign of caution.

Market-Moving Headlines

#	HEADLINE	SOURCE
1	Spain rejects White House claim it agreed to cooperate with U.S. forces amid Iran war	CNBC
2	BYD sales plunge in first two months of 2026 as EV giant loses more ground to competitors	CNBC
3	Emmanuel Macron spelled out a pivot in France's nuclear strategy. Here's why it's so significant	CNBC
4	Cramer says the oil market is signaling the Iran war won't spiral — and that's bullish for stocks	CNBC
5	Iran's Shahed drone: How 'the poor man's cruise missile' is shaping Tehran's retaliation	CNBC
6	Apple announces MacBook Neo, its most affordable laptop ever	CNBC
7	Google's AI chatbot allegedly told user to stage 'mass casualty attack,' wrongful death suit claims	CNBC

#	HEADLINE	SOURCE
8	Amazon's Bahrain data center targeted by Iran for support of U.S. military, state media says	CNBC

US Market Close

INDEX	CLOSE	DAILY %
WTI Crude Oil	76.56	+2.54%
Nasdaq	22,807.48	+1.29%
Gold	5,177.00	+1.11%
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	98.97	+0.21%

▲ Best: WTI Crude Oil (+2.54%)

▼ Worst: USD Index (+0.21%)

Overnight Markets

ASIA-PACIFIC (CLOSED)

INDEX	CLOSE	DAILY %	SESSION
Nikkei 225	55,278.06	+1.90%	Closed
Hang Seng	25,321.34	+0.28%	Closed
KOSPI	5,583.90	+9.63%	Closed
Nifty 50	24,765.90	+1.17%	Closed
ASX 200	8,940.30	+0.44%	Closed

EUROPE

INDEX	CLOSE/PRICE	DAILY %	SESSION
DAX	24,253.13	+0.20%	Early Session
FTSE 100	10,591.27	+0.22%	Early Session
CAC 40	8,189.10	+0.26%	Early Session
Euro Stoxx 50	5,888.31	+0.30%	Early Session

Currencies & Safe Havens

PAIR	RATE	DAILY %
EUR/USD	1.1617	+0.04%
GBP/USD	1.3358	+0.03%
USD/JPY	157.2580	-0.33%
AUD/USD	0.7056	+0.22%
USD/CNH	6.8978	-0.06%
CHF/USD	1.2823	+0.27%

Pre-Market Futures

CONTRACT	PRICE	DAILY %
S&P Futures	6,869.75	-0.09%
Nasdaq Futures	25,106.00	-0.09%
Dow Futures	48,683.00	-0.23%
Gold Futures	5,176.40	+1.10%
10Y T-Note	112.55	-0.32%
WTI Crude Oil	76.54	+2.52%

What Moved Markets Yesterday

EVENT	ACTUAL	EXPECTED	PREVIOUS	SURPRISE
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No major events recorded.

Today's Watch List

TIME (EST)	EVENT	IMPORTANCE	EXPECTED
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No high-importance events scheduled today.

Positioning Notes

SIGNAL

SUGGESTED ACTION

No strong directional signals this morning

Maintain current allocations and watch for intraday cues.

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