



Market Map MMM

Thursday August 27 2026

TODAY'S THEME

- Nvidia crushes Q2 estimates — revenue jumps 106% y/y to \$96.2B, shares rise nearly 4% after hours, lifting Nasdaq futures.
- US Q2 GDP confirmed at 1.5%, Core PCE holds steady at 3.3% y/y — in-line data leaves the September rate debate unchanged.
- The Jackson Hole Symposium kicks off today, with Fed Chair Warsh's keynote due Friday — the week's final catalyst.

KEY NUMBERS

Instrument	Price/Level	Change	Reference Note
DJ30	53,637.6	-0.05%	Prev close 53,665.6 (+0.18% Wed)
S&P 500	7,712.78	+0.24%	Prev close 7,694.24 (+0.24% Wed)
NAS100	29,474.75	+0.42%	Prev close 29,352.17 (+0.47% Wed)
DXY	99.07	+0.02%	Prev close 99.04 (+0.23% Wed)
EURUSD	1.1654	+0.02%	Prev close 1.1652 (-0.19% Wed)
GBPUSD	1.3588	-0.04%	Prev close 1.3594 (-0.40% Wed)
USDJPY	159.32	+0.01%	Prev close 159.30 (+0.07% Wed)
XAUUSD (Gold)	4,626.32	+0.70%	Prev close 4,594.00 (-1.38% Wed)

Instrument	Price/Level	Change	Reference Note
XAGUSD (Silver)	69.05	+1.45%	Prev close 68.06 (-0.84% Wed)
Brent Oil — CFD Cash	88.89	-0.10%	Prev close 88.98 (+0.70% Wed)
WTI Oil — CFD Cash	82.47	-0.10%	Prev close 82.55 (+0.98% Wed)
BTCUSD	78,831.85	+0.52%	Prev close 78,422.35 (+0.19% Wed)

MACRO / MICRO & GEOPOLITICAL HEADLINES

Nvidia beats across the board

› Nvidia's fiscal Q2 revenue hit \$96.2 billion, up 106% y/y and well above the \$91.9 billion estimate, with adjusted EPS of \$2.22 beating the \$2.08 forecast. Shares rose nearly 4% in after-hours trading as the scale of demand once again exceeded already-high expectations.

Source: *Investing.com / Kiplinger*

Core PCE and GDP both land in line

› The Fed's preferred inflation gauge held at 3.3% y/y in July, matching estimates, while the second GDP estimate confirmed 1.5% annualized growth for Q2, unchanged from the advance reading. Neither report shifted the September rate-path debate.

Source: *BEA / investingLive*

Jackson Hole Symposium begins today

› The Federal Reserve's annual Jackson Hole gathering opens today, with Fed Chair Kevin Warsh's keynote address on Friday set to be the week's most closely watched event for policy signals.

KEY EVENTS TODAY

- 15:30 (12:30 GMT) USD Unemployment Claims — Forecast 208K, Previous 206K
- All day ALL Jackson Hole Economic Symposium begins — Fed Chair Warsh's keynote due Friday

MARKET PULSE — WHAT'S DRIVING MARKETS

🛢️ **Oil:** Brent (88.89) and WTI (82.47) ease slightly in a quiet pre-Jackson Hole session, holding within this week's tighter range after Tuesday's diplomacy-driven slide.

🥇 **Gold & Silver:** Gold (4,626.32) and silver (69.05) both bounce back as risk appetite stays firm and yesterday's in-line inflation data removes a source of uncertainty for bullion.

📈 **Equities:** Futures point higher after Nvidia's blowout beat, with the Nasdaq the biggest beneficiary; broader indices also firm as Wednesday's matched PCE/GDP cleared up a major worry for the market.

🌐 **FX:** A quiet session — the dollar holds broadly steady while GBP eases modestly; markets now look to Friday's Jackson Hole speech as the week's remaining catalyst.

KEY TAKEAWAY

- › Nvidia's beat, alongside chatter of a Q3 guide above \$108B, suggests the AI capex trade still has room to run — watch whether the broader chip complex follows through today.
- › Wednesday's in-line PCE/GDP data was a non-event for Fed policy — the test now shifts to Friday's Warsh speech at Jackson Hole.
- › With no major data left this week beyond today's jobless claims, expect markets to trade quietly into Friday, with positioning around the Jackson Hole speech the dominant theme.

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