



MultiFi Market Map_(MMM)

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Today's Theme

- FOMC decision day: Fed set to deliver its first hike since 2023 tonight at 9:00 PM Beirut (≈90% priced, 3.75% → 4.00%), press conference at 9:30 PM.
- The US 10-year yield breached 5% Tuesday for the first time since 2023 as the global bond selloff deepens right into the Fed's decision.
- Crypto extended losses after the Clarity Act failed a key Senate procedural vote Tuesday (49-50, needed 60) — Bitcoin drifted down to \$74,800 before pausing.
- UK CPI (9 AM) and US Retail Sales (3:30 PM) round out a data-heavy day ahead of tonight's main event.

Key Numbers

Instrument	Price/Level	Changes	Reference Notes
DJ30	52,192.8	+0.12%	Prev close 52,128.6 (-0.61% Tue)
S&P 500	7,601.29	+0.12%	Prev close 7,591.84 (-0.46% Tue)
NAS100	29,027.84	+0.19%	Prev close 28,971.96 (-0.69% Tue)
DX	99.37	+0.02%	Prev close 99.35 (+0.18% Tue)
EURUSD	1.1542	+0.02%	Prev close 1.1540 (-0.08% Tue)
GBPUSD	1.3480	+0.06%	Prev close 1.3472 (-0.20% Tue)
USDJPY	155.34	+0.15%	Prev close 155.11 (+0.50% Tue)
XAUUSD (Gold)	4,326.48	+0.77%	Prev close 4,293.34 (-0.12% Tue)
XAGUSD (Silver)	64.59	+1.48%	Prev close 63.65 (+0.70% Tue)
Brent Oil — CFD Cash	109.04	-0.70%	Prev close 109.81 (+2.05% Tue)
WTI Oil — CFD Cash	104.72	-1.00%	Prev close 105.78 (+3.61% Tue)
BTCUSD	75,908.25	-0.02%	Prev close 75,919.95 (-4.17% Tue)

The above levels are indicative as of the time of publication.

Macro & Geopolitical Headlines

US 10-year yield breaches 5% for the first time since 2023

The benchmark yield touched 5.01-5.04% Tuesday before easing slightly, as oil-driven inflation fears and heavy Treasury supply deepen a broad bond selloff. The 30-year sits near 5.35-5.39%, its highest in years. Global yields followed higher across Japan, Germany, the UK and France.

Source: CNBC / TradingEconomics

Clarity Act fails Senate cloture vote, crypto extends losses

The crypto market-structure bill fell short 49-50 (needed 60), with three Republicans defecting. Bitcoin slid to a session low near \$74800 on the news, dealing a blow to the industry's push for a durable US regulatory framework.

Source: NPR / Axios

Macro & Geopolitical Headlines

Saudi cancels September crude cargoes to Europe as pipeline stays shut

Reuters reports Saudi Arabia is informing European refiners that some September crude cargoes are being canceled due to the still-offline East-West pipeline — confirmation the supply loss is now materializing, not just theoretical.

Major European buyers are rushing to buy replacement oil from the North Sea and other regions on the spot market.

Source: Reuters / CoinDesk

FOMC decision looms tonight

The Fed announces its rate decision at 9:00 PM Beirut, with updated economic projections and the statement, followed by Warsh's press conference at 9:30 PM. A 25bp hike to 4.00% is ≈90% priced — what would be the first since 2023.

KEY EVENTS

- 9:00 AM (06:00 GMT) GBP — CPI y/y — Forecast 3.1%, Previous 2.9%
- 3:30 PM (12:30 GMT) USD — Core Retail Sales m/m — Forecast 0.6%, Previous -0.3%
- 3:30 PM (12:30 GMT) USD — Retail Sales m/m — Forecast 0.8%, Previous -0.6%
- 9:00 PM (18:00 GMT) USD — Federal Funds Rate — Forecast 4.00%, Previous 3.75%
- 9:00 PM (18:00 GMT) USD — FOMC Economic Projections
- 9:00 PM (18:00 GMT) USD — FOMC Statement
- 9:30 PM (18:30 GMT) USD — FOMC Press Conference (Powell)

BOE follows tomorrow (hold expected), BOJ Friday (hike to 1.25% expected).

Market Pulse — What's Driving Markets

Oil: Brent (109.04) / WTI (104.72) ease slightly this morning even as Saudi's cargo cancellations to Europe confirm real supply loss — consolidation, not relief, ahead of tonight's Fed decision.

Gold & Silver: Gold (4,326.48) / silver (64.59) jump as this time yield spike and crypto's stumble send flows back to traditional havens into tonight's FOMC.

Equities: Modest gains (DJ30 +0.12%, Nasdaq +0.19%) reflect cautious positioning — the 10-year's break above 5% keeps a lid on conviction either way.

FX: Dollar little changed (DXY 99.37) as markets await the Fed. Yen keeps drifting weaker even as the rate backdrop should theoretically support it.

Key Takeaway

- Tonight's Fed decision, with the 10-year already at 5%, is pivotal for every asset class — a hawkish-hike framing coupled with aggressive signals that further hikes could follow to suppress inflation could push yields even higher.
- Crypto's Clarity Act setback removes a near-term regulatory catalyst rather than reflecting a fundamentals shift — but downside momentum could persist without new positive news.
- Saudi's confirmed cargo cancellations move oil's supply story from “at risk” to “materializing” — a structural upgrade to the risk premium regardless of today's small pullback.

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