



MultiFi Market Map_(MMM)

Wednesday, September 23, 2026

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Today's Theme

- Nasdaq notches a second straight record on Meta's Muse AI app surge, and oil extends its slide toward \$93 WTI on Hormuz reopening hopes.
- US-Iran talks at UNGA called "constructive" by envoy Witkoff, but new US sanctions hit Iranian airlines today and Hormuz/Houthi incidents persist.
- Trump-Xi summit is tomorrow in Washington — markets positioning ahead of the highest-profile US-China meeting this year.
- Japan closed for a bank holiday — thin liquidity keeps USDJPY (157.57) rangebound near recent highs.

Key Numbers

Instrument	Price/Level	Changes	Reference Notes
DJ30	51,964.0	+0.20%	Prev close 51,859.0 (-0.36% Tue)
S&P 500	7,774.96	+0.17%	Prev close 7,762.06 (-0.01% Tue)
NAS100	30,755.68	+0.16%	Prev close 30,706.93 (+0.76% Tue)
DXY	100.43	+0.17%	Prev close 100.27 (+0.11% Tue)
EURUSD	1.1429	-0.18%	Prev close 1.1450 (-0.14% Tue)
GBPUSD	1.3318	-0.20%	Prev close 1.3345 (-0.18% Tue)
USDJPY	157.57	+0.11%	Prev close 157.40 (+0.00% Tue)
XAUUSD (Gold)	4,344.50	-0.32%	Prev close 4,358.72 (+0.34% Tue)
XAGUSD (Silver)	66.65	-0.64%	Prev close 67.08 (+1.57% Tue)
Brent Oil — CFD Cash	98.80	-0.50%	Prev close 99.34 (-1.54% Tue)
WTI Oil — CFD Cash	92.65	-1.07%	Prev close 93.70 (-2.44% Tue)
BTCUSD	87,164.65	+1.07%	Prev close 86,241.05 (-0.81% Tue)

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

Macro & Geopolitical Headlines

Nasdaq's record run continues as Meta's Muse app tops the charts.

Tuesday's rally was powered by Meta, whose new Muse AI agent app hit #1 on Apple's App Store — analysts said its adoption pace has outstripped ChatGPT's early trajectory.

The Dow lagged (-0.36%) as cyclical sectors underperformed the tech-led move, while falling oil added to the risk-on tone.

Source: Yahoo Finance

US-Iran talks at UNGA "constructive" — but sanctions and Hormuz incidents continue.

US envoy Steve Witkoff said American and Iranian negotiators completed a round of talks he called promising, with Trump adding discussions went "very good" and another meeting is coming.

Trump also warned a full deal is more likely only after the midterms, while new US sanctions freeze out Iranian airlines from today and tanker incidents in the Strait of Hormuz continue alongside Houthi attacks on Saudi Arabia.

Source: CBS News / Reuters

Oil extends its slide toward \$93 WTI on Hormuz reopening reports

Crude fell further Tuesday and into this morning on reports Iran could reopen the Strait of Hormuz to shipping within days, though the region's parallel military incidents leave that read fragile.

Source: Saxo

Trump-Xi summit lands tomorrow in Washington

Trump and Xi meet at the White House Thursday — the marquee event of the week — with AI, critical minerals, tech, and Taiwan on the agenda.

President Xi is skipping the UN General Assembly entirely to keep the focus solely on this bilateral state visit, with policy expectations kept deliberately low by both sides. Source: CNBC / CSIS

KEY EVENTS

- **All Day (JPY)** — Japan Bank Holiday, thin liquidity expected
- **10:15 (07:15 GMT) EUR** — French Flash Manufacturing PMI — Forecast 50.9, Previous 51.1
- **10:15 (07:15 GMT) EUR** — French Flash Services PMI — Forecast 48.3, Previous 48.0
- **10:30 (07:30 GMT) EUR** — German Flash Manufacturing PMI — Forecast 54.1, Previous 54.3
- **10:30 (07:30 GMT) EUR** — German Flash Services PMI — Forecast 49.9, Previous 49.7
- **11:30 (08:30 GMT) GBP** — Flash Manufacturing PMI — Forecast 51.5, Previous 51.7
- **11:30 (08:30 GMT) GBP** — Flash Services PMI — Forecast 52.0, Previous 52.5
- **17:30 (14:30 GMT) USD** — Crude Oil Inventories — Forecast -0.7M, Previous -0.6M

Market Pulse — What's Driving Markets

Oil: Brent (98.80) and WTI (92.65) extend their slide on Hormuz reopening chatter, though the parallel military incidents keep that story fragile.

Gold & Silver: Gold (4,344.5) and silver (66.65) both pull back from Tuesday's highs as risk appetite for now favors equities over havens.

Equities: Nasdaq extends its record run on Meta's Muse app momentum while the Dow lags on weaker cyclicals.

FX: Dollar index (100.43) firms broadly; USDJPY (157.57) drifts in thin Japan-holiday trade, with the yen still sensitive to any fresh rate-check talk.

Key Takeaway

- Iran talks being called "constructive" while sanctions bite and Hormuz incidents continue is a genuine mixed signal — don't read oil's slide as confirmation of de-escalation yet.
- Meta's Muse-driven rally shows single-stock AI catalysts still have real power to move the whole tape — watch for follow-through or a fade once the news cycle moves on.
- Tomorrow's Trump-Xi summit is the week's pivotal event — low expectations mean any surprise on tariffs or Taiwan could move markets more than the meeting itself suggests.

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