



MultiFi Market Map_(MMM)

Wednesday, September 30, 2026

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Today's Theme

- Oil sinks (Brent -3.05%, WTI -4.82% Tuesday) after Washington moves to release up to 40M more barrels from the Strategic Petroleum Reserve to cool fuel prices
- RBA hikes to a 15-year-high 4.60% in a unanimous vote, citing sticky inflation — AUD drops even as Governor Bullock signals the board isn't done yet.
- Gold and silver hold their Tuesday surge (XAU +1.63%, XAG +1.38%) as US-Iran talks stall — Qatari mediation stuck, raising the odds of renewed conflict.
- USD/JPY dips toward 156.40 in Asia on half-year-end repatriation flows and as Fed's Williams says there's "no need for urgency" on the next hike
- Micron reports fiscal Q4 tonight after the close — the market's next big AI-demand test — ahead of Thursday's Nike earnings and Friday's US jobs report

Key Numbers

Instrument	Price/Level	Changes	Reference Notes
DJ30	51,568.3	+0.31%	Prev close 51,410.9 (-0.15% Tue)
S&P 500	7,693.10	+0.19%	Prev close 7,678.55 (-0.08% Tue)
NAS100	30,399.18	+0.07%	Prev close 30,379.02 (+0.32% Tue)
DXY	101.17	+0.06%	Prev close 101.11 (+0.20% Tue)
EURUSD	1.1330	-0.10%	Prev close 1.1342 (-0.25% Tue)
GBPUSD	1.3223	-0.07%	Prev close 1.3232 (-0.16% Tue)
USDJPY	157.00	-0.17%	Prev close 157.27 (-0.07% Tue)
XAUUSD (Gold)	4,181.64	+0.01%	Prev close 4,181.28 (+1.63% Tue)
XAGUSD (Silver)	61.12	-0.54%	Prev close 61.45 (+1.38% Tue)
Brent Oil — CFD Cash	100.10	+0.56%	Prev close 99.54 (-3.05% Tue)
WTI Oil — CFD Cash	92.24	+0.54%	Prev close 91.75 (-4.82% Tue)
BTCUSD	83,299.75	-0.36%	Prev close 83,600.35 (+0.20% Tue)

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

Macro/Micro & Geopolitical Headlines

Washington taps the emergency reserve again to cool fuel prices

The US Energy Department will loan out up to 40 million more barrels from the Strategic Petroleum Reserve, the final leg of a 172-million-barrel drawdown ordered in March, as pump prices near \$4/gallon and diesel tops \$6.

The reserve will fall to its lowest level since 1982, but the extra supply hit crude hard, dragging Brent and WTI sharply lower on Tuesday.

Source: *The National / Bloomberg*

RBA lifts rates to a 15-year high, unanimous on persistent inflation

Australia's central bank raised its cash rate a quarter-point to 4.60%, the fourth hike of 2026, after headline and core inflation both ran hot in July. All nine board members backed the move, citing Middle East-driven energy costs and AI-fueled tech price pressure — and signaled patience is wearing thin on the path back to target.

Source: *ABC News / GuruFocus*

US-Iran talks stall as Qatari mediation hits a wall

A two-page compromise floated by Qatar's mediator has gone nowhere, with neither Washington nor Tehran willing to move off their core demands — Iran wants the naval blockade lifted first, the US wants nuclear concessions first.

US officials reportedly see a risk that Trump could order renewed military action after the midterms if the deadlock holds, keeping a war-risk premium embedded in oil.

Source: *Investing Live / FXStreet*

Yen firms on half-year-end flows as Fed's Williams downplays hike urgency

USD/JPY slipped toward 156.40 in Asian trade as Japanese investors repatriated funds ahead of Tokyo's September 30 fiscal half-year close — flows traders expect to fade once the new half begins.

Separately, New York Fed President John Williams said there is "no need for urgency" on further tightening, though one more 2026 hike remains possible if data holds up.

Source: *Investing Live / FXStreet*

KEY EVENTS

- **4:30 AM Beirut / 1:30 GMT (released)** — AUD CPI y/y came in at 4.0% (forecast 4.1%, prev 3.5%); m/m 0.4% (forecast 0.5%, prev 1.0%); Trimmed Mean m/m 0.2% (forecast 0.3%, prev 0.5%)
- **All Day** — EUR German Prelim CPI m/m: forecast 0.5%, previous 0.2%
- **3:15 PM Beirut / 12:15 GMT** — USD ADP Non-Farm Employment Change: forecast 73K, previous 38K
- **3:30 PM Beirut / 12:30 GMT** — USD Core PCE Price Index m/m: forecast 0.3%, previous 0.2%
- **3:30 PM Beirut / 12:30 GMT** — USD Final GDP q/q: forecast 1.5%, previous 1.5%
- **3:30 PM Beirut / 12:30 GMT** — USD Final GDP Price Index q/q: forecast 6.4%, previous 6.4%
- **Tonight (after close): Micron Technology** — fiscal Q4 2026 results; Street looks for ~\$50.8B revenue and ~\$31.50 adjusted EPS, with focus on HBM demand and the FY2027 outlook
- **Thu Oct 1 (after close): Nike** — fiscal Q1 2027 results, a global consumer-health barometer

EARNINGS WATCH

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Market Pulse — What's Driving Markets

Oil: Brent (100.10) and WTI (92.24) stabilize after Tuesday's sharp SPR-driven slide, though the extra barrels and a stalled US-Iran track leave the market two-sided.

Gold & Silver: Gold (4,181.64) and Silver (61.12) hold most of Tuesday's surge as stalled Iran talks keep haven demand underpinned, despite rising long-term bond yields and expectations of extended central bank tightening.

Equities: DJ30, S&P 500 and NAS100 all firm as a hawkish-but-patient Fed support risk appetite into Micron's report tonight.

FX: AUD dips after the widely expected RBA hike to 4.60%; yen strengthens toward 156.40 on half-year-end flows before USD/JPY steadies near 157.00.

Key Takeaway

- Micron's report tonight is the session's real catalyst — with the stock's rally built on AI-driven memory demand, any wobble in HBM guidance could hit broader semiconductor sentiment Thursday.
- The SPR release caps oil's upside for now, but a stalled US-Iran track and a possible post-midterm escalation risk mean the drop could prove temporary .
- Williams' "no urgency" comments don't rule out one more 2026 hike — today's Core PCE and Friday's jobs report will decide whether the Fed's patient stance holds into year-end.

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