



MultiFi Market Map_(MMM)

Monday, October 5, 2026

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Today's Theme

- Friday's weak US jobs report (payrolls +29K vs ~84K expected, unemployment up to 4.2%) slashes October hike odds to roughly 15-17%, from near 70% earlier in the week.
- G7 and EU agree to release 100M barrels of crude and diesel over the weekend, dragging Brent Futures toward \$101-102 and WTI near \$90 — though Hormuz tanker attacks keep a floor under prices.
- The global bond rout pauses as 10-year Treasury yields ease to ~5.28%, though French OAT and UK gilt yields stay near multi-decade highs on fiscal strain.
- Nikkei jumps 2.5% to a three-month high as AI/semiconductor names rally on the softer Fed outlook, even as the dollar stays resilient and caps gold/silver.
- Quiet week for earnings — focus turns to Wednesday's FOMC minutes and today's lone data point, US ISM Services PMI.

Key Numbers

Instrument	Price/Level	Change	Reference Note
DJ30	51,130.1	-0.11%	Prev close 51,187.9 (+0.50% Fri)
S&P 500	7,718.83	-0.04%	Prev close 7,721.97 (+0.69% Fri)
NAS100	30,827.75	+0.10%	Prev close 30,797.36 (+0.96% Fri)
DXY	102.28	+0.59%	Prev close 101.68 (-0.11% Fri)
EURUSD	1.1163	-0.77%	Prev close 1.1250 (+0.08% Fri)
GBPUSD	1.3194	-0.32%	Prev close 1.3237 (+0.33% Fri)
USDJPY	158.09	+0.16%	Prev close 157.83 (-0.14% Fri)
XAUUSD (Gold)	4,141.20	+0.02%	Prev close 4,140.49 (-0.87% Fri)
XAGUSD (Silver)	61.19	+1.39%	Prev close 60.35 (-1.00% Fri)
Brent Oil — CFD Cash	104.73	-1.63%	Prev close 106.47 (+0.36% Fri)
WTI Oil — CFD Cash	92.03	-1.78%	Prev close 93.70 (-1.92% Fri)
BTCUSD	86,041.75	+0.30%	Prev close 84,401.65 (-0.26% Fri)

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

Macro & Geopolitical Headlines

Weak jobs report guts October hike bets

September payrolls rose just 29,000 against roughly 84,000 expected, with the unemployment rate ticking up to 4.2% and July-August revised down a combined 60,000. Traders slashed the odds of an October 28 hike to around 15-17%, from near 70% earlier in the week, with December now seen as the more likely window for any further move.

Source: Invezz / KuCoin

G7's 100-million-barrel release cools oil, but Hormuz risk lingers

the G7 and EU agreed to release 100 million barrels of crude and diesel over four months, featuring a rapid, frontloaded diesel tranche. The emergency move pulled Brent Futures to \$101 and WTI toward \$90, though analysts view the relief as temporary due to structural market deficits.

Meanwhile, the Strait of Hormuz remains highly volatile, averaging one shipping incident per day since October 2—including a strike on an Aframax tanker—even as regional exports technically claw back to pre-war levels.

Source: Al Jazeera / Reuters

Bond rout pauses, but France and UK stress persists

US 10-year Treasury yields eased back from multi-decade highs to around 5.28% after the soft jobs data cooled rate-hike fears, though they remain elevated enough to pressure valuations. France's 10-year OAT yield is pushing toward 5%, with CDS costs on French debt at their highest since 2013 as Lecornu's €54bn 2027 budget draws market skepticism, while UK 30-year gilts sit near 6% — the highest since 1998 — on pension and welfare cost pressures.

Source: Reuters / Investing.com

Nikkei leads an AI-driven Asia rally as the dollar stays firm

Japan's Nikkei 225 jumped 2.5% to a three-month high, led by AI and semiconductor names riding the softer Fed outlook, though the Topix rose just 1.2%.

The US dollar, meanwhile, stayed resilient even after an initial dip on the jobs miss, keeping gold and silver's gains in check despite the softer rate backdrop.

Source: Investing Live

KEY EVENTS TODAY

- 5:00 PM Beirut / 2:00 PM GMT — US ISM Services PMI: forecast 55.1, previous 55.4

WEEK AHEAD

- Wed Oct 8: FOMC Minutes
- No major earnings releases this week

Market Pulse — What's Driving Markets

Oil: Brent (104.73) and WTI (92.03) pull back further as the G7's 100M-barrel reserve release offsets ongoing Hormuz tanker friction and Gulf tension.

Gold & Silver: Gold (4,141.20) holds flat while silver (61.19) outperforms, with the resilient dollar and multi-decade high yields capping metals even as hike odds collapse.

Equities: DJ30 and S&P 500 ease slightly from Friday's highs while NAS100 edges up, with AI/tech sentiment still the dominant driver after Asia's rally.

FX: Dollar firms broadly post-payrolls; euro and pound both slip further as French and UK bond-market stress persists.

Key Takeaway

- With October hike odds down to ~15–17%, Wednesday's FOMC minutes remain the week's key macro event. Even though the meeting predates Friday's soft jobs report, any hawkish internal pushback against the market's current dovish assumptions could quickly jolt yields and the dollar.
- The G7 reserve release offers only temporary oil relief, and while rerouted exports have recovered to pre-war volumes, persistent refining bottlenecks and daily Hormuz tanker attacks insulate Brent Futures near \$100 without a true diplomatic breakthrough.
- French and UK bond stress remains the structural story to watch — with no near-term resolution to either fiscal standoff, EUR and GBP could stay capped even as the dollar's own rally cools.

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