MultiFi

MultiFi Market Map (MMM)

Thursday,October 22, 2026

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Today's Theme

- NYT: US and Israel plan post-midterm strikes on Iran; US orders staff out of Saudi Arabia — Brent futures holds near $111.
- UK inflation jumps to 3.5% on fuel; BOE hike talk grows.
- Tesla and Lam slide after hours; NAS100 -1.4% overnight as gold and silver are sold.

Key Numbers

Instrument	Price/Level	Change	Reference Note
DJ30_SPOT	52,672.1	-0.38%	Prev close 52,872.6 (+0.50% Wed)
SP500_SPOT	7,704.93	-0.68%	Prev close 7,757.66 (+0.21% Wed)
NAS100_SPOT	29,410.13	-1.41%	Prev close 29,831.43 (+0.47% Wed)
DXY_SPOT	101.399	-0.10%	Prev close 101.504 (0.00% Wed)
EURUSD	1.12434	+0.09%	Prev close 1.12332 (-0.02% Wed)
GBPUSD	1.33971	+0.02%	Prev close 1.33949 (+0.12% Wed)
USDJPY	157.694	-0.27%	Prev close 158.117 (-0.03% Wed)
XAUUSD (Gold)	4,091.29	-1.18%	Prev close 4,140.31 (+0.38% Wed)
XAGUSD (Silver)	56.331	-2.80%	Prev close 57.951 (-0.02% Wed)
Brent Oil — CFD Cash	111.991	+0.81%	Prev close 111.094 (+0.46% Wed)
WTI Oil — CFD Cash	100.206	+0.83%	Prev close 99.377 (-0.54% Wed)
BTCUSD	82,701.85	-2.31%	Prev close 84,654.95 (+2.39% Wed)

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

Trading involves a high risk to the investor's capital. Understand all risks before investing.

Macro/Micro & Geopolitical Headlines

Strike plans and evacuations raise the stakes.

The New York Times reported that US and Israeli militaries have drawn up specific plans for renewed strikes on Iran after the Nov 3 midterms. The State Department ordered non-essential staff and families out of Saudi Arabia, and a strike on Dammam airport killed one.

IRGC commander Yadollah Javani warned seven undersea cables in Hormuz could be targeted if the US resumes attacks; two more tankers were hit off Iraq and Oman. Rubio said Iran's nuclear capability is "at the core" of US policy.

Source: InvestingLive (citing NYT); Times of Israel; ABC News; Business Standard

UK CPI surges to 3.5%.

September inflation rose to 3.5% (3.4% expected) from 3.1%, with core at 2.8% and services at 3.7%. Motor fuels, up 29.8% on the year, drove the jump.

Source: ONS; FXStreet

Big tech: Meta delivers, Tesla and Lam disappoint.

Wednesday's AI rally lifted the Nasdaq 1.1%, S&P 0.6% and Dow 0.7%. After the bell, Meta rose ~2% as revenue jumped 26% to $64.6bn, though its plan for non-voting Class C shares drew scrutiny. Tesla fell over 3% despite a beat as AI and robotaxi spending weighed, and Lam Research dropped ~7% on its outlook.

Source: Investing.com; InvestingLive; Business Standard; GuruFocus

Data roundup.

US crude stocks fell 3.06M barrels (0.82M expected). New Zealand's annual inflation slowed to 3.7% (3.8% expected), and the Bank of Korea held at 3.00%. The US 10-year eased to ~5.11%.

Source: InvestingLive; Business Standard

TODAY'S KEY ECONOMIC INDICATORS

- Released — 00:45 (21:45 GMT Wed) NZD — CPI q/q: Actual 0.7% | Forecast 0.8% | Previous 1.5%
- 15:30 (12:30 GMT) USD — Unemployment Claims: Forecast 200K | Previous 199K
- Earnings today: Lockheed Martin, Comcast, Blackstone, Procter & Gamble, Honeywell, Western Digital.

Market Pulse — What's Driving Markets

Oil: Brent at $112 and WTI back above $100 after a larger-than-expected crude draw. The strike-plan report effectively puts a date on the risk premium: after Nov 3.

Gold & Silver: Gold slips 1.2% below $4,100 and silver 2.8% even as war headlines intensify — further proof metals are trading with risk and rates, not as havens.

Equities: Wednesday's AI-led gains are being unwound: NAS100 sheds 1.4% overnight on Tesla and Lam. Bitcoin follows, down 2.3% from Wednesday's 84.6K.

FX: The dollar softens and the yen firms to 157.7. Cable holds 1.3397 after the UK CPI beat, while the kiwi slipped as New Zealand inflation undershot.

Key Takeaway

- The risk premium now has a timeline: post-midterm strike plans and evacuations from Saudi Arabia keep $110+ Brent anchored unless diplomacy breaks through.
- UK inflation at 3.5% with core rising makes a BOE hike a live debate, offering sterling support against a politically strained euro.
- Earnings reward delivery and punish spending: Meta rose, Tesla and Lam fell — investors are still policing AI capex ahead of next week's Oct 27–28 FOMC.

DISCLAIMER

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