



MultiFi Market Map_(MMM)

Thursday, October 1, 2026

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Today's Theme

- Micron smashes fiscal Q4 estimates (revenue ~\$54.2B, adjusted EPS ~\$33.42 vs ~\$50.8B/\$31.50 expected) — Nikkei jumps 2.5% as the AI-memory boom finds fresh fuel
- August core PCE cools to 0.2% m/m and 3.0% y/y (both below forecast) — but Treasury yields rise anyway, with the curve steepening as long-end rates lead
- Rubio orders Iran's UN delegation out of New York after talks collapse — a rare diplomatic rebuke that leaves conventional channels effectively closed
- Wall Street closed mixed Wednesday — Dow at its lowest since June (-0.86%) as tech held up far better than industrials and small caps
- Yen weakens despite a solid Tankan as BOJ opinions damp near-term hike bets; Nike reports tonight ahead of Friday's US jobs report

Key Numbers

Instrument	Price/Level	Change	Reference Note
DJ30	51,045.0	+0.15%	Prev close 50,968.7 (-0.86% Wed)
S&P 500	7,689.75	+0.37%	Prev close 7,661.66 (-0.22% Wed)
NAS100	30,658.08	+0.70%	Prev close 30,444.46 (+0.22% Wed)
DXY	101.30	+0.09%	Prev close 101.20 (+0.09% Wed)
EURUSD	1.1328	-0.01%	Prev close 1.1329 (-0.11% Wed)
GBPUSD	1.3258	-0.04%	Prev close 1.3263 (+0.24% Wed)
USDJPY	158.08	+0.42%	Prev close 157.41 (+0.09% Wed)
XAUUSD (Gold)	4,175.72	+0.45%	Prev close 4,156.82 (-0.59% Wed)
XAGUSD (Silver)	61.15	+1.27%	Prev close 60.38 (-1.75% Wed)
Brent Oil — CFD Cash	100.50	-1.20%	Prev close 101.73 (+2.19% Wed)
WTI Oil — CFD Cash	91.71	-1.44%	Prev close 93.05 (+1.42% Wed)
BTCUSD	83,711.25	+0.08%	Prev close 83,640.65 (+0.05% Wed)

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

Macro /Micro & Geopolitical Headlines

Micron's blowout quarter lights up AI-memory trade, lifts Nikkei.

Micron's fiscal Q4 revenue came in near \$54.2 billion with adjusted EPS around \$33.42, both comfortably above Street estimates and the company's own guidance, as AI-driven demand for high-bandwidth memory kept surging.

The results powered a 2.5% jump in the Nikkei overnight, with chip-linked names leading the advance across Asia.

Source: Futu / Investing Live

Cooler core PCE fails to pin down Treasury yields.

August core PCE rose just 0.2% on the month and 3.0% from a year earlier, both below the 0.3%/3.3% forecast, with headline inflation also undershooting at 0.3% m/m and 3.4% y/y.

Yields dipped on the release but reversed into the close, with the 10-year up roughly 3.6 basis points to 5.29% and the 30-year up about 3.7bps to 5.63% — a steeper curve that keeps long-end borrowing costs elevated even as near-term implied hike odds ease to 34% from 64% earlier for October.

Source: Yahoo Finance / Investing Live

Rubio expels Iran's delegation as US-Iran diplomacy hits a new low

Secretary of State Marco Rubio ordered Iran's UN delegation, led by Foreign Minister Araghchi, to leave the US after Qatari-mediated talks collapsed Monday with neither side willing to compromise.

The delegation departed for Doha overnight — an unusually blunt diplomatic rebuke that Trump followed by saying the standoff "will end very soon one way or the other."

Source: Axios

Dow slips to a June low as tech outruns the rest of the market

The Dow fell 0.86% to its lowest close since June, with only eight of its 30 components higher, while the Nasdaq Composite edged up 0.24% and the S&P 500 and Russell 2000 both slipped. The split underscores how narrowly tech-led the market's resilience has become even as rate and oil pressures weigh on the broader tape.

Source: Investing Live

KEY EVENTS TODAY

- 3:30 PM Beirut / 12:30 GMT — USD Unemployment Claims: forecast 201K, previous 197K
- 4:30 PM Beirut / 1:30 GMT — ECB President Lagarde speaks
- 5:00 PM Beirut / 2:00 GMT — FOMC Member Waller speaks
- 5:00 PM Beirut / 2:00 GMT — US ISM Manufacturing PMI: forecast 54.8, previous 54.6

EARNINGS WATCH

- Tonight (after close): Nike — fiscal Q1 2027 results, a global consumer-health barometer

WEEK AHEAD

- Fri Oct 2, 3:30 PM: Average Hourly Earnings m/m (forecast 0.3%, prev 0.3%), Non-Farm Payrolls (forecast 98K, prev 162K), Unemployment Rate (forecast 4.1%, prev 4.1%).

Market Pulse — What's Driving Markets

Oil: Brent (100.50) and WTI (91.71) pull back from Wednesday's bounce as Rubio's expulsion of Iran's delegation raises escalation risk even as talks stay frozen.

Gold & Silver: Gold (4,175.72) and silver (61.15) push higher as the Iran standoff and a steepening Treasury curve keep haven demand bid.

Equities: NAS100 leads the bounce on Micron's blowout quarter, while DJ30 tries to stabilize after Wednesday's slide to a June low.

FX: Dollar firms broadly; USD/JPY climbs back above 158 as the Tankan and cautious BOJ opinions cap yen demand.

Key Takeaway

- Rubio's expulsion of Iran's delegation is the sharpest signal yet that diplomacy is stalling — any further escalation headline could quickly reverse oil's pullback .
- A cooler core PCE didn't stop long-end yields from rising — a steepening curve with elevated 10-/30-year rates can keep financial conditions tight even if the Fed turns more patient.
- Micron's blowout quarter keeps the AI trade alive into Nike's report tonight and Friday's jobs data — together they'll set the tone for how the market closes out the week.

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