MultiFi

MultiFi Market Map (MMM)

Thursday,October 15, 2026

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Today's Theme

- Hot CPI (3.7%, core 0.3%) makes an October hike a coin flip — Nasdaq -1.9%, silver -6%
- AI rout hits Asia: Kospi plunges 7%+, Kosdaq halted, Nikkei -3.5%
- Overnight Treasury rebound sinks the dollar and lifts gold; oil slides on US sanctions-relief talk despite Aramco HQ strike

Key Numbers

Instrument	Price/Level	Change	Reference Note
DJ30_SPOT	51,548.6	-0.10%	Prev close 51,598.0 (-0.15% Wed)
SP500_SPOT	7,681.35	-0.45%	Prev close 7,715.72 (-1.17% Wed)
NAS100_SPOT	29,610.75	-1.01%	Prev close 29,912.53 (-2.12% Wed)
DXY_SPOT	101.740	-0.55%	Prev close 102.299 (+0.31% Wed)
EURUSD	1.12284	+0.66%	Prev close 1.11549 (-0.38% Wed)
GBPUSD	1.32501	+0.46%	Prev close 1.31895 (-0.49% Wed)
USDJPY	157.618	-0.45%	Prev close 158.326 (+0.01% Wed)
XAUUSD (Gold)	4,145.12	+0.99%	Prev close 4,104.42 (-1.35% Wed)
XAGUSD (Silver)	55.880	+0.47%	Prev close 55.616 (-5.98% Wed)
Brent Oil — CFD Cash	106.370	-1.77%	Prev close 108.286 (-0.38% Wed)
WTI Oil — CFD Cash	94.783	-1.23%	Prev close 95.960 (+0.20% Wed)
BTCUSD	80,732.55	-1.17%	Prev close 81,688.95 (-1.98% 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

CPI runs hot; hike odds jump.

September CPI rose 0.6% m/m and 3.7% y/y (3.6% expected); core rose 0.3% and 2.6% (0.2%/2.5% expected), with gasoline (+9.1%) driving over half the gain.

The 10-year hit 5.28% and October hike odds rose to ~49% from 22%. Chicago Fed's Goolsbee called the data "discouraging"; SF Fed's Daly said more hikes are likely but saw no urgency in October. Treasuries rebounded ~20bp off post-CPI highs overnight.

Source: BLS; TheStreet; TipRanks (CME FedWatch); InvestingLive

AI selloff goes global.

Tech fell 3%, the chip index 4.3% and CoreWeave 15.5% as a Gartner estimate fuelled doubts over AI returns. In Seoul, the Kospi sank over 7% for a seventh straight loss — Samsung -7.7%, SK Hynix -10% — and a Kosdaq plunge triggered a 20-minute trading halt.

Source: Asia Business Daily; Seoul Economic Daily; InvestingLive

Aramco HQ hit; Washington eyes shadow-fleet relief.

Reuters sources reported extensive damage at Aramco's Dhahran headquarters; Saudi state media cited a limited fire with no casualties and no reported output impact.

Separately, the US is weighing easing sanctions on shadow-fleet tankers to cut record freight rates — pulling crude lower overnight.

Source: Reuters via US News; The National; Business Standard

Earnings: ASML sold out, BofA stumbles.

ASML posted record sales of €11.7bn, guided Q4 to €14.2–15.2bn and said 2027–28 supply will not fully meet demand. BlackRock beat; Bank of America slid after a miss and its $1.2bn fine. Defensives led: healthcare +2.4%, staples +2.2%.

Source: ASML; TheStreet

Today's Key Economic Indicators.

- Released — 03:30 (00:30 GMT) AUD Employment Change: Actual -39.3K | Forecast 19.6K | Previous 29.3K
- Released — 03:30 (00:30 GMT) AUD Unemployment Rate: Actual 4.7% | Forecast 4.6% | Previous 4.7%
- 07:30 (04:30 GMT) CHF — SNB Chairman Schlegel Speaks
- 09:00 (06:00 GMT) GBP — GDP m/m: Forecast -0.1% | Previous 0.4%
- 10:30 (07:30 GMT) GBP — BOE Gov Bailey Speaks
- 15:30 (12:30 GMT) USD — Core PPI m/m: Forecast 0.3% | Previous 0.2%
- 15:30 (12:30 GMT) USD — PPI m/m: Forecast 0.6% | Previous 0.4%
- 15:30 (12:30 GMT) USD — Core Retail Sales m/m: Forecast 0.6% | Previous 1.4%
- 15:30 (12:30 GMT) USD — Retail Sales m/m: Forecast 0.3% | Previous 1.2%
- 15:30 (12:30 GMT) USD — Philly Fed Manufacturing Index: Forecast 28.2 | Previous 37.8
- 15:30 (12:30 GMT) USD — Unemployment Claims: Forecast 199K | Previous 197K

Earnings today: TSMC (TSM), PepsiCo (PEP), Alcoa (AA).

Market Pulse — What's Driving Markets

Oil: Brent eases to ~$106 as sanctions-relief talk outweighs the Aramco strike. Freight costs, not lost barrels, are now the swing factor.

Gold & Silver: Silver was CPI's biggest casualty (-6%), pushing the gold/silver ratio out to ~74 from ~70. The overnight bond rally lifts gold ~1% back above $4,140, while silver lags at +0.5%.

Equities: A clean defensive rotation: health care and staples bid, tech dumped. NAS100 sheds another 1% overnight — TSMC's guidance today is the AI litmus test.

FX: The dollar reverses with yields: DXY -0.55%, EURUSD 1.123, USDJPY 157.6. The Aussie bucks the trend after jobs fell 39.3K and unemployment held at a five-year high of 4.7%.

Key Takeaway

- A hot core print turns the Oct 27–28 FOMC into a coin flip — today's PPI and retail sales decide whether markets price the hike in full.
- The AI trade faces two fronts at once — higher discount rates and ROI doubts — even as ASML says it is sold out through 2028. TSMC is the tiebreaker.
- The overnight bond bounce is relief, not reversal: with energy driving inflation and Aramco under fire, yields stay hostage to oil.

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