



MultiFi Market Map_(MMM)

Friday, October 2, 2026

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Today's Theme

- Brent spikes over 4% Thursday as the US reportedly preps a third carrier strike group and 10,000 more troops for the Gulf, with Trump flagging bombing could resume after the midterms.
- Dollar hits its highest since May 2025 into today's payrolls, with the euro and pound hit hardest as French and UK bond yields surge to multi-decade highs.
- US jobs report headlines today's calendar (forecast 89K, prev 162K) after a hawkish-leaning Fed chorus Thursday — Barkin, Waller, Collins and Schmid vs. a more dovish Bowman.
- Gold and silver extend their climb (XAU +0.48%, XAG +0.96% Thursday) as oil-driven inflation fears and Gulf escalation risk keep havens supported.
- Eurozone flash CPI due before Wall Street opens, with French and German inflation prints feeding directly into the ECB's next move.

Key Numbers

Instrument	Price/Level	Change	Reference Note
DJ30	51,058.5	+0.25%	Prev close 50,932.6 (-0.07% Thu)
S&P 500	7,690.00	+0.27%	Prev close 7,669.34 (+0.10% Thu)
NAS100	30,628.70	+0.41%	Prev close 30,504.20 (+0.20% Thu)
DXY	101.71	-0.08%	Prev close 101.79 (+0.58% Thu)
EURUSD	1.1251	+0.08%	Prev close 1.1241 (-0.77% Thu)
GBPUSD	1.3208	+0.11%	Prev close 1.3194 (-0.52% Thu)
USDJPY	157.89	-0.10%	Prev close 158.05 (+0.40% Thu)
XAUUSD (Gold)	4,183.41	+0.16%	Prev close 4,176.79 (+0.48% Thu)
XAGUSD (Silver)	61.17	+0.35%	Prev close 60.96 (+0.96% Thu)
Brent Oil — CFD Cash	105.83	-0.23%	Prev close 106.08 (+4.28% Thu)
WTI Oil — CFD Cash	95.00	-0.55%	Prev close 95.53 (+2.67% Thu)
BTCUSD	85,481.25	+1.02%	Prev close 84,617.95 (+1.17% Thu)

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

Macro /Micro& Geopolitical Headlines

US military build-up sends Brent surging over 4%

The Wall Street Journal reported the Pentagon may deploy a third aircraft-carrier strike group alongside roughly 10,000 additional sailors and Marines to the Gulf, with US Central Command declining to comment on "operational security" grounds.

President Trump separately said further strikes on Iran remain "possible" after the November midterms, and the combination sent Brent up more than 4% and WTI over 2.5% on the day.

Source: CNBC / FXStreet

Dollar at a 17-month high as euro and pound bear the brunt

The dollar index touched its strongest level since May 2025 heading into today's payrolls, lifted by resilient US data and elevated Treasury yields. The euro led G10 losses as France's 10-year yield hit roughly 4.96% — the highest since 2002 — on deepening fiscal strain and political paralysis ahead of a contested €54bn budget vote.

Sterling fell alongside it as UK 30-year gilt yields broke above 6% for the first time since 1998, with surging wholesale energy costs stoking inflation fears and compounding pre-budget borrowing concerns.

Source: Investing Live / Tech Times / Roic.ai

Fed chorus leans hawkish into jobs day, but heavyweight leadership urges patience.

Richmond Fed's Barkin said inflation risks "outweigh" those to employment as the economy firms, Boston's Collins warned of inflation risks running notably above target, and Kansas City's Schmid said the Fed still has "work to do" on inflation.

However, Fed Vice Chair Jefferson and New Board Governor Bowman provided a counterweight Thursday, both signaling no "urgent need" for immediate further rate hikes. This internal divide leaves today's payrolls report as the critical tie-breaker for whether the Fed pauses or tightens again at the October FOMC meeting.

Source: Bloomberg / Newsquawk

Gold and silver extend their advance as bonds flash risk

Bullion pushed further above \$4,170 as the bond-market rout across the US, UK and France reinforced demand for havens. With equities still grinding higher on tech strength, the gold bid looks driven more by the inflation and geopolitical backdrop than by broad risk-off positioning.

Source: Investing Live

KEY EVENTS TODAY

- Overnight (released) — JPY Tokyo Core CPI y/y came in at 2.7% (forecast 2.4%, prev 1.8%)
- 12:00 PM Beirut / 9:00 GMT — EUR Core CPI Flash Estimate y/y: forecast 2.5%, previous 2.4%
- 12:00 PM Beirut / 9:00 GMT — EUR CPI Flash Estimate y/y: forecast 3.7%, previous 3.2%
- 3:30 PM Beirut / 12:30 GMT — USD Average Hourly Earnings m/m: forecast 0.3%, previous 0.3%
- 3:30 PM Beirut / 12:30 GMT — USD Non-Farm Payrolls: forecast 89K, previous 162K
- 3:30 PM Beirut / 12:30 GMT — USD Unemployment Rate: forecast 4.1%, previous 4.1%

EARNINGS RECAP

- Nike (after Thursday's close): EPS beat (\$0.48 vs \$0.44 expected) but revenue missed (\$11.21B vs \$11.35B) on a 4% decline, with Greater China sales down 26% and FY2027 guidance pointing to a further high-single-digit drop — shares fell over 6% after hours

Market Pulse — What's Driving Markets

Oil: Brent (105.83) and WTI (95.00) ease only slightly after Thursday's 4%+ spike, holding most of the gain as the Gulf military build-up keeps a war premium embedded.

Gold & Silver: Gold (4,183.41) and silver (61.17) extend higher as surging global bond yields and Gulf risk keep haven demand well supported.

Equities: DJ30, S&P 500 and NAS100 all firm into payrolls, with tech's resilience continuing to carry the tape.

FX: Dollar eases slightly off its 17-month high; euro and pound both bounce modestly from Thursday's rout as French and UK bond yields stay in focus.

USDJPY is hovering right around 158, but the Yen is showing clear strength on its underlying crosses after Tokyo Core CPI jumped unexpectedly to 2.7%—its fastest pace in 10 months—solidifying the macroeconomic case for another Bank of Japan rate hike.

Key Takeaway

- Today's payrolls (forecast 89K) is the week's real swing factor — a weak print would clash with a largely hawkish Fed chorus and could trigger an outsized dollar and yield reaction.
- The French and UK bond-market stress isn't a one-day story — with a French budget vote and a UK autumn budget both looming, EUR and GBP could stay under pressure well beyond today.
- The Gulf military build-up keeps oil's floor elevated — any confirmation of troop or carrier movements, or an actual resumption of strikes, could push Brent toward fresh highs fast.

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