MultiFi

MultiFi Market Map (MMM)

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Today's Theme

- Friday: payrolls smash forecasts (+165K vs ~60K) — December Fed hike odds jump to ~80%, the dollar posts its best day in five months.
- Weekend: Houthi missile hits an Aramco tower in Riyadh; Nvidia's board opens a probe into CEO Huang.
- Overnight: Asia rebounds (Nikkei +3.3%, Taiex +5.7%) and gold jumps 1.4%; Trump meets Qatar's PM today on Iran.

Key Numbers

Instrument	Price/Level	Change	Reference Note
DJ30_SPOT	51,738.2	+0.81%	Prev close 51,323.2 (+0.09% Fri)
SP500_SPOT	7,429.75	+0.64%	Prev close 7,382.45 (+0.72% Fri)
NAS100_SPOT	27,154.10	+0.54%	Prev close 27,007.30 (+1.82% Fri)
DXY	102.022	-0.13%	Prev close 102.159 (+0.69% Fri)
EURUSD	1.11569	+0.19%	Prev close 1.11362 (-0.71% Fri)
GBPUSD	1.33755	+0.21%	Prev close 1.33469 (-0.75% Fri)
USDJPY	158.290	-0.15%	Prev close 158.524 (+0.52% Fri)
XAUUSD	4,126.83	+1.38%	Prev close 4,070.85 (-0.43% Fri)
XAGUSD	53.188	+2.38%	Prev close 51.950 (+0.30% Fri)
BRENT_SPOT	101.157	+0.17%	Prev close 100.988 (-1.60% Fri)
WTI_SPOT	91.833	+0.86%	Prev close 91.049 (-0.99% Fri)
BTCUSD	74,814.55	-1.20%	Prev close 75,722.50 (+0.05% Fri)

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

Friday: jobs blowout, chips bounce.

US payrolls rose 165K (F ~60K), with +84K in upward revisions; unemployment fell to 4.1% and wages rose 0.4% m/m. The 10y yield climbed to ~4.86%. The Nasdaq rose 1.1% as chips recovered (AMD +11%), but lost 3.4% on the week. UoM sentiment improved to 51.0 (F 47.5).

Source: BLS; StockTitan; CNBC

Weekend: Gulf attacks escalate as talks continue.

On Sunday a Houthi missile damaged an Aramco tower in Riyadh's financial district — Saudi Arabia's Energy Ministry confirmed an attempted strike on an Aramco facility. A drone attack, suspected to be Iranian, halted Iraq's Khor Mor gas field, cutting 2.8 GW of Kurdistan's power. Trump told CNN renewed US strikes are "highly unlikely" if talks progress; Rubio said Tehran's demands are unacceptable, while Qatar denied talks had failed. Trump meets Qatar's PM today (19:00 Beirut).

Source: ANI; CNN; Al Jazeera; investingLive

Weekend: Nvidia board probes CEO.

Nvidia opened an independent investigation after CEO Jensen Huang admitted a relationship with a Megaspeed executive whom US officials reportedly suspect of ties to Chinese intelligence. Nvidia says it has no reason to believe secrets were compromised; Huang remains CEO, and lawmakers from both parties are seeking answers. Today is Nvidia's first session since the news.

Source: CNBC; CNN; TechCrunch

Overnight: China data and tariff truce.

China's PPI jumped 5.7% y/y (F 5.3%), the most since 2022, while CPI eased to 0.7% (F 0.8%).

Beijing extended its suspension of the extra 24% tariff on US goods, keeping a 10% levy, ahead of next week's APEC summit, where Trump expects to meet Xi.

Source: investingLive

TODAY'S KEY ECONOMIC INDICATORS

- 19:25 (17:25 GMT) GBP — BoE Governor Bailey Speaks
- Low-impact today: Fed's Bowman (15:40), Goolsbee (17:00) and Barkin (19:15) speak; US wholesale inventories (17:00); ECOFIN/Eurogroup meetings. Released overnight: China CPI 0.7% y/y (F 0.8%), PPI 5.7% y/y (F 5.3%). Earnings: KKR, Barrick (before the open); Take-Two, Occidental, The Trade Desk, Rocket Lab (after the close).

WEEK AHEAD

- **Tue 10: US October CPI (15:30 Beirut)** — headline seen at 0.3% m/m (prev 0.6%), core 0.2%. US 10y auction; China trade data. Earnings: CoreWeave (after the close).
- **Wed 11: US Veterans Day** — stocks open, bond market closed. Earnings: Franco-Nevada.
- Thu 12: UK Q3 GDP (09:00 Beirut, F 0.7% q/q); US jobless claims; EIA oil inventories; US 30y auction. Earnings: Cisco, Applied Materials (after the close).
- Fri 13: US October PPI (15:30 Beirut, F 0.4% m/m); Eurozone Q3 GDP; MUFG, SMFG and Mizuho results. Fed's Waller, Jefferson and Williams speak during the week.

Market Pulse — What's Driving Markets

Oil: Brent edges up 0.2% overnight to $101.2 and WTI 0.9% to $91.8, after Friday's 1.6% drop — the Aramco and Khor Mor attacks offset diplomatic hopes ahead of Trump's meeting with Qatar.

Gold & Silver: Gold climbs 1.4% overnight to $4,127 and silver 2.4% to $53.19 on haven demand after the weekend attacks and a softer dollar — even as Goldman cut its 2027 gold forecast to $4,800.

Equities: US futures extend Friday's rebound overnight (DJ30 +0.8%, SP500 +0.6%, NAS100 +0.5%), following Asia higher; Nvidia's open is the first test. BTC slips 1.2% to $74,815.

FX: After Friday's jobs-driven rally, the dollar eases overnight (DXY 102.02); EUR/USD rises to 1.1157 and GBP/USD to 1.3376, while USD/JPY dips to 158.29.



Yields: On Friday the 10y rose to ~4.86% from Thursday's two-month low as payrolls revived December hike bets. Tuesday's CPI decides whether the front end reprices higher again.

Key Takeaway

- A hot labor market puts Fed hikes back on the table — Tuesday's CPI is the week's pivot for yields, the dollar and tech valuations.
- The Gulf war is spreading to energy infrastructure (Riyadh, Khor Mor) even as diplomacy continues — oil keep a geopolitical floor.

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- AI stocks face a new test: the Nvidia probe, CoreWeave’s results Tuesday and Cisco/Applied Materials Thursday will show whether last week’s rout has found a floor.

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