Macro Minute Video

July 1, 2026

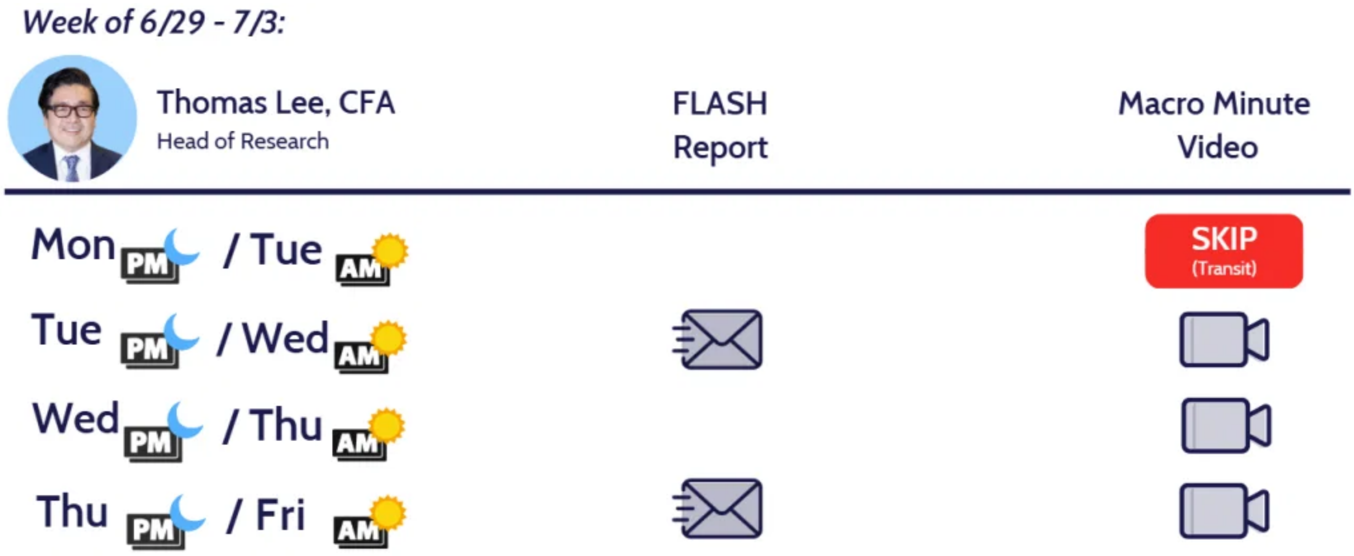
VIDEO FLASH: AS WE LOOK AT 2H2026, 6 FACTORS SUPPORT WHY WE ARE 'BUYING THE DIP'

Thomas Lee, CFA [AC]

HEAD OF RESEARCH

VIDEO: As we look into 2H2026, we discuss the multiple factors that will be important to investors in the second half. The overall picture is one of a stronger economy. And we believe there is downside to inflation and thus, the Fed could be more dovish than the bond market is pricing.

More in today's Macro Minute video linked here (duration: 4:31).


Week of 6/29 - 7/3:
Thomas Lee, CFA
Head of Research
FLASH Report
Macro Minute Video
Mon PM / Tue AM
SKIP (Transit)
Tue PM / Wed AM
Wed PM / Thu AM
Thu PM / Fri AM

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