Macro Minute Video

July 7, 2026

# VIDEO FLASH: CARNAGE IN SEMIS/MEMORY CONTINUE. BUT WE REMAIN NEAR-TERM CONSTRUCTIVE AND ARE BUYING THE DIP.

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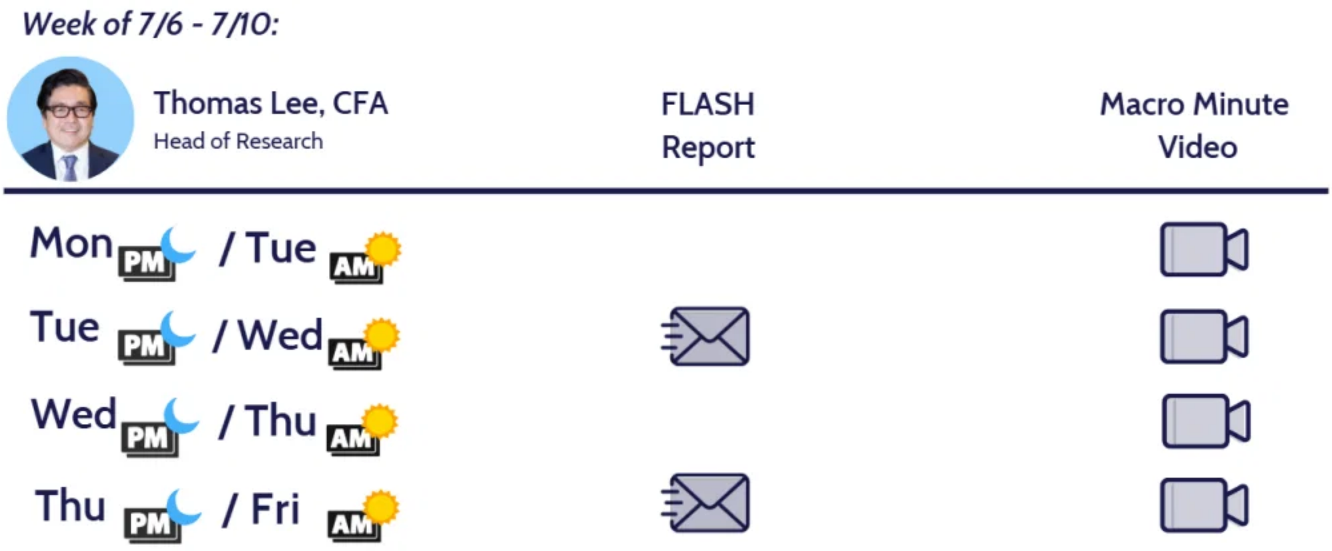
HEAD OF RESEARCH

***VIDEO: In the near-term, we continue to be constructive and expect S&P 500 to reach 7,700 near-term, but the wall of worry continues to grow. The market reaction to Samsung results and the reports Amazon $AMZN will not issue more debt after this recent sale raise concerns about AI visibility. But we see this largely as a 'buy the dip' moment***.

***More in today's Macro Minute video linked here (duration: 5:20)***.


Week of 7/6 - 7/10:
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FLASH Report
Macro Minute Video
Mon PM / Tue AM
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