Macro Minute Video

July 8, 2026

VIDEO FLASH: FOMC MINUTES SHOW DOVISH CLUES, MORE THAN EXPECTED. WE THINK THE SELLOFF IS OVERDONE IN SEMIS, MEMORY, MOMENTUM.

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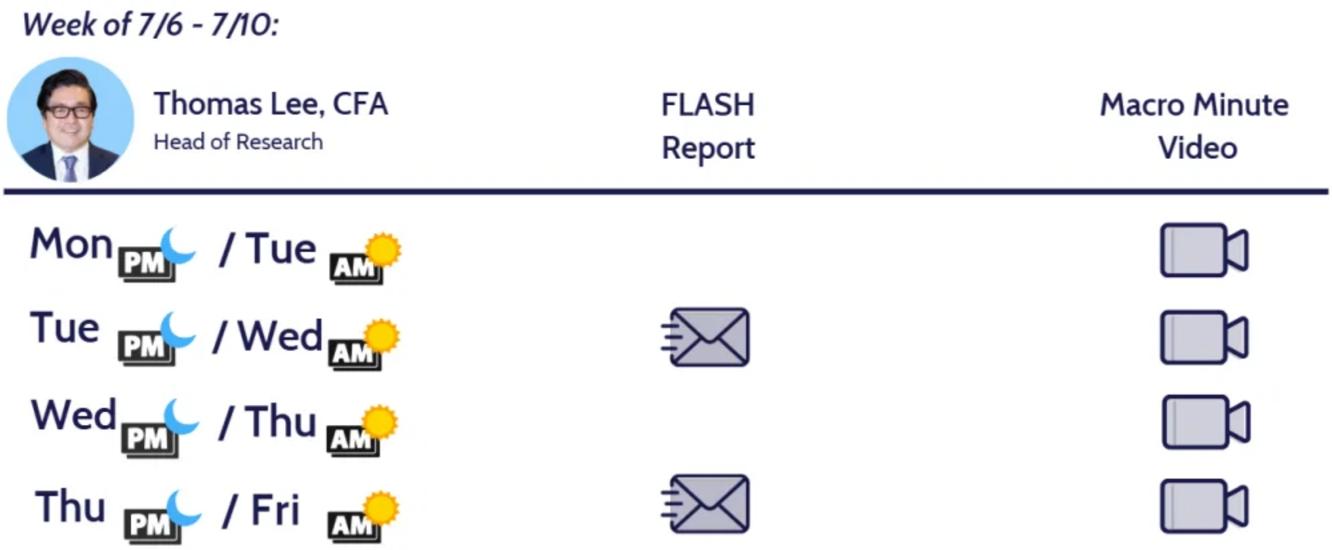
HEAD OF RESEARCH

VIDEO: We discuss how the severe decline in momentum is overdone and points to a likely bottom. The FOMC is surprisingly dovish, at least that is our takeaway, and we discuss some of those clues.

More in today's Macro Minute video linked here (duration: 3:39).


Week of 7/6 - 7/10:
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Mon PM / Tue AM
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