Macro Minute Video

July 30, 2026

VIDEO FLASH: 5 REASONS WE BELIEVE THE STRUCTURAL BOTTOM IS IN FOR THE AI AND 'BOTTLENECK' STOCKS

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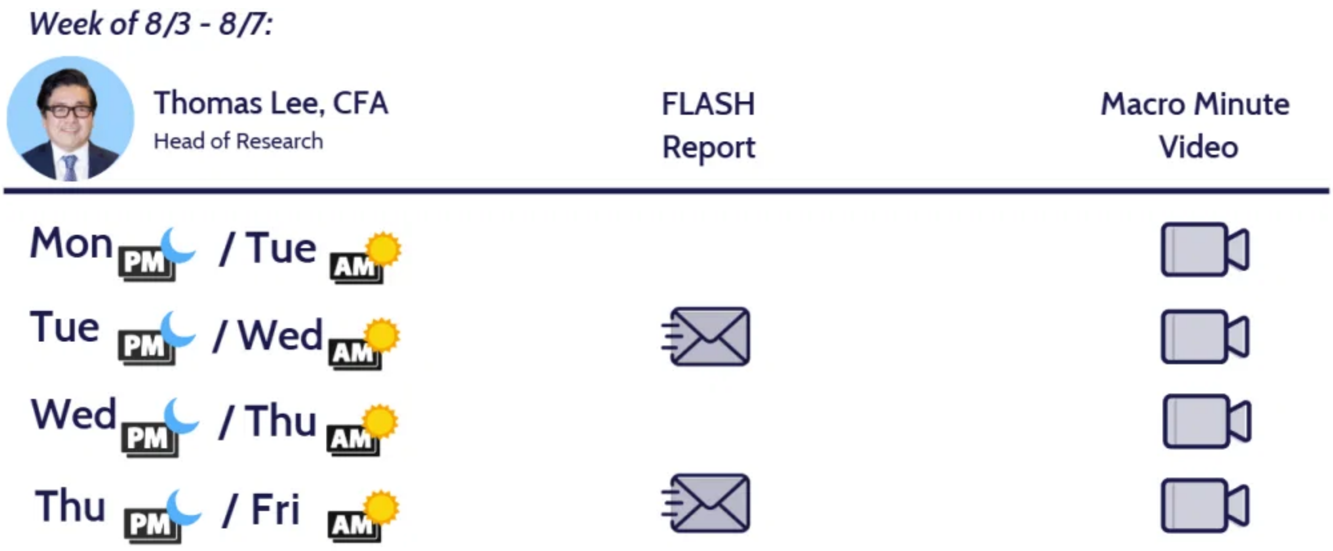
HEAD OF RESEARCH

VIDEO: We discuss the 5 reasons why we believe the structural bottom is in for AI stocks. A large factor is we believe the massive leverage unwind is largely over. This started in Korea and seems to have reached its nadir today.

More in today's Macro Minute video linked here (duration: 5:27).


Week of 8/3 - 8/7:
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