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Macro Minute Video

August 20, 2026

VIDEO FLASH: THE AI DOWNSTREAM TRADE CONTINUES TO STRENGTHEN, PARTICULARLY CRYPTO. WE LOOK AT EQUITIES MOST HIGHLY CORRELATED TO ETH AND BTC. WE ALSO STILL EXPECT S&P 500 7,900-8,000 BY MONTH-END

Thomas Lee, CFA [AC]
HEAD OF RESEARCH

VIDEO: The AI bottleneck story is stalling as data center opposition is now resonating with voters. This probably explains why crypto, particularly Ethereum, has been notably outperforming gaining 46% since June 30th. Ethereum is a low energy network. But the bigger story is that crypto adoption is growing as Wall Street tokenizes and Agentic AI is another downstream story. We look at crypto equities correlated to the rise in #ETH and #BTC.

More in today's Macro Minute video linked here (duration: 6:17).

Week of 8/24 - 8/28:

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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