Macro Minute Video

August 31, 2026

VIDEO FLASH: 5 REASONS WE ARE CONTRARIAN POSITIVE ON EQUITIES IN SEPTEMBER, DESPITE NEGATIVE SEASONALS

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HEAD OF RESEARCH

VIDEO: We discuss the contrarian reasons we are positive on equities in September. We also analyze the distortion to Core PCE coming from 'software accessories' and how this is contributing to 1/3 of the excess inflation. The Fed even acknowledges this issue, yet, we do not hear any economists nor the Street flagging this error.

More in today's Macro Minute video linked here (duration: 6:53).

Week of 8/31 - 9/4:

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