Macro Minute Video

October 22, 2026

VIDEO FLASH: MARKET WARINESS OF AI CONTINUES TO GROW. BUT WE SEE AI FUNDAMENTALS STRENGTHENING, HENCE, WE ARE BUYING THIS DIP

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HEAD OF RESEARCH

VIDEO: Investors are overly bearish on the future growth prospects of AI, and we see the funding concerns and even political risks as overblown. The two dovish developments are that yields are falling and Fed fund futures show declining odds of a Dec hike.

More in today's Macro Minute video linked here (duration: 4:47).

Week of 10/26 - 10/30:

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Head of Research

	FLASH Report	Macro Minute Video
Mon PM / Tue AM		✓
Tue PM / Wed AM	✓	✓
Wed PM / Thu AM		✓
Thu PM / Fri AM	✓	✓

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