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Evidence-based research.
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Macro Minute Video

November 10, 2026

VIDEO FLASH: DESPITE HIGHER OCT CORE CPI, TO US, A FED HIKE IN DEC IS ARGUABLY STILL A MISTAKE, GIVEN HIGHER RATES = MORE HOUSING SHORTAGE = INFLATIONARY.



Thomas Lee, CFA AC

HEAD OF RESEARCH

VIDEO: We discuss how Fed hikes are probably contributing to inflation via higher interest income and by making the housing market tighter. And of the 4 largest contributors to excess CPI inflation, 3 of 4 are due to supply shocks as we analyze in this video.

More in today's Macro Minute video linked here (duration: 5:10).



Week of 11/9 - 11/13:



Thomas Lee, CFA
Head of Research

	FLASH Report	Macro Minute Video
Mon PM / Tue AM		
Tue PM / Wed AM	SKIP (Transit)	
Wed PM / Thu AM		
Thu PM / Fri AM		

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