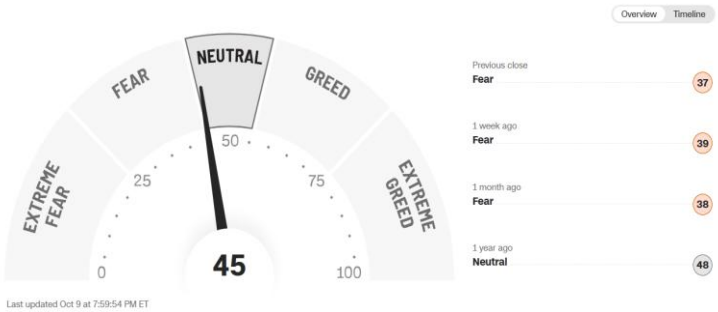
US Weekly Market Insights
Week ending October 9, 2026

MARKET PERFORMANCE

	Last Close	WTD %Δ	Forward P/E (x)*	YTD %Δ
S&P 500	7,811.5	1.2	18.6	14.1
Nasdaq 100	30,883.2	0.2	20.7	22.3
DJIA	51,655.0	0.9	22.6	7.5
MSCI World	4,962.4	0.7	17.3	12.0
FTSE 100	10,552.1	0.9	12.0	6.2
Nikkei 225	69,030.9	1.1	21.7	37.1
Shanghai Composite	3,813.8	-0.7	12.2	-3.9
WTI (USD/bbl)	91.9	0.8	N/A	60.0
Gold (USD/bbl)	4,194.2	1.3	N/A	-2.9
Bitcoin (USD)	82,438.6	-2.4	N/A	-5.9

Source: Bloomberg
** 2026e*

FEAR AND GREED INDEX ^



Source: CNN Business

MARKET COMMENTARY

- A constructive week despite a bond-market scare **(S&P 500 +1.2%, Nasdaq 100 +0.2%, Dow +0.9%)**. Stocks opened firm on Monday even though ISM services eased to **54.9** while prices paid jumped to **74**, the highest since July 2022. On Tuesday the S&P500 set a **record close of 7,818.93**, led by utilities after Google's power deal with Constellation. Midweek, the 10-Y yield briefly topped **5.35%**, a **24-year high**, as Fed minutes showed most officials expect **another hike this year**. On Thursday the Nasdaq fell –1.4% after an FT report put OpenAI's annualized revenue near **$50bn**, about **$20bn below estimates**, which hit chipmakers. Friday rebounded **+0.6%. Utilities, staples and energy led; tech and semis lagged.**
- **Next week:** The week hinges on **CPI**. Headline is expected to accelerate to **3.6% YoY from 3.4%** on gasoline, while **core is seen cooling to +0.2% MoM vs. +0.3%**. Rates stand at **3.75–4.00%**, and futures price roughly **70–80% odds of a December hike.** A soft core print would let markets look through energy and ease pressure on a **10-Y near 5.25%.** Core at 0.3% or higher would harden the hike case and weigh on long-duration tech. That is the swing factor: whether energy feeds into core. **PPI (+0.5% vs. +0.4%)** tests pipeline pressure, and **retail sales (+0.3% vs. +1.2%)** will show whether $90+ oil is denting spending. **Chair Warsh's IMF remarks** will set the tone ahead of the **28 October** decision.
- **Story of the week: AT&T, Verizon and T-Mobile fell 8.8–13.3%** on Friday, with T-Mobile down **–13.3%** and Verizon posting its **worst day since 2002.** The trigger was SpaceX agreeing to buy Grain Management's nationwide **800 MHz** low-band portfolio, reportedly for about **$8bn**. The twist is that T-Mobile itself sold that spectrum to Grain for **$2.9bn** plus 600 MHz licenses, in a deal that only closed on **10 August.** Low-band spectrum carries signals far and through walls. That closes the indoor-coverage gap in Starlink Mobile's pitch.

STOCK PERFORMANCE

S&P 500

TOP GAINERS	Ticker	Last Close	WTD %Δ	YTD %Δ
Ptc	PTC	194.45	35.0	11.6
Crown Castle	CCI	79.64	19.9	-10.4
Moderna	MRNA	225.00	18.4	663.0
Constellation Energy	CEG	298.07	15.8	-15.6
Vistra	VST	161.48	15.3	0.1
TOP LOSERS	**Ticker**	**Last Close**	**WTD %Δ**	**YTD %Δ**
Intel	INTC	104.7	-12.3	183.7
Mosaic	MOS	18.74	-11.1	-22.2
Teradyne	TER	402.68	-10.3	108.0
Skyworks Solutions	SWKS	76.35	-10.2	20.4
C.H. Robinson W.	CHRW	142.31	-9.8	-11.5

NASDAQ 100

TOP GAINERS	Ticker	Last Close	WTD %Δ	YTD %Δ
Constellation Energy	CEG	298.07	15.8	-15.6
Shopify Inc	SHOP	170.85	12.9	6.1
Mercadolibre	MELI	1,889.85	11.4	-6.2
Autodesk	ADSK	235.35	11.0	-20.5
Palantir Technologies	PLTR	209.05	10.8	17.6
TOP LOSERS	**Ticker**	**Last Close**	**WTD %Δ**	**YTD %Δ**
Arm Holdings	ARM	266.28	-13.4	143.6
Intel	INTC	104.70	-12.3	183.7
Teradyne	TER	402.68	-10.3	108.0
T-Mobile Us	TMUS	148.58	-9.2	-26.8
Nebius Group	NBIS	221.07	-9.0	164.1

DJIA

TOP GAINERS	Ticker	Last Close	WTD %Δ	YTD %Δ
Visa	V	385.45	6.9	9.9
Walmart	WMT	111.35	6.8	-0.1
Walt Disney	DIS	108.05	5.7	-5.0
Cisco Systems	CSCO	118.39	5.5	53.7
Procter & Gamble	PG	151.23	4.4	5.5
TOP LOSERS	**Ticker**	**Last Close**	**WTD %Δ**	**YTD %Δ**
Caterpillar	CAT	800.47	-5.3	39.7
Honeywell Inter.	HON	207.73	-2.9	1.6
Salesforce	CRM	229.13	-2.4	-13.5
NVIDIA	NVDA	229.28	-2.0	22.9
Boeing	BA	190.37	-1.6	-12.3

Source: Bloomberg

ECONOMIC CALENDAR

Date	Time*	Event	Prior	Estimation
14-Oct-26	15:30	Core CPI MoM	0.3%	0.2%
14-Oct-26	15:30	CPI YoY	3.4%	3.6%
15-Oct-26	15:30	PPI MoM	0.4%	0.5%
15-Oct-26	15:30	Retail Sales MoM	1.2%	0.3%
16-Oct-26	6:30	Fed Chair Warsh (IMF meetings, Bangkok)	-	-

Source: Bloomberg, Trading Economics, Investing.com
*(GMT +3:00)

COMPANY CALENDAR

Date	Company	Event
13-Oct-26	JPMorgan Chase & Co. (JPM)	Earnings – Before the Open
13-Oct-26	Johnson & Johnson (JNJ)	Earnings – Before the Open
14-Oct-26	ASML Holding N.V. (ASML)	Earnings – Before the Open
14-Oct-26	Bank of America Corporation (BAC)	Earnings – Before the Open
15-Oct-26	Taiwan Semi. Manuf. Co. Ltd. (TSM)	Earnings – Before the Open

Source: Bloomberg, Investing.com, Earnings Whispers

^Fear & Greed Index: The Fear & Greed Index is a way to gauge stock market movements and whether stocks are fairly priced prepared by CNN Business. The theory is based on the logic that excessive fear tends to drive down share prices, and too much greed tends to have the opposite effect. The Fear & Greed Index is a compilation of seven different indicators that measure some aspect of stock market behavior. They are market momentum, stock price strength, stock price breadth, put and call options, junk bond demand, market volatility, and safe haven demand.

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