London Investment Markets – Newsletter

London Investment Markets

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London Investment Markets – News & Markets

LIM keeps you informed with the latest financial news, market analysis, and economic events that move global markets.

Week Commencing: June 15, 2026

Markets are entering arguably the most critical macro trading week of the year. Equity markets managed to claw back early losses last week, fuelled by a late-session surge in risk sentiment as headline rumours of a potential U.S.-Iran peace deal sent oil prices sliding to 8-week lows. However, the temporary relief rally faces an absolute gauntlet this week: a historic central bank bonanza featuring five major rate decisions, including the first policy meeting under the newly minted Fed Chair leadership.

Market Backdrop: The Powell to Warsh Era Officially Begins

The macro narrative shifts completely to monetary policy. On Wednesday, the Federal Reserve will deliver its interest rate decision—marking **Kevin Warsh's first official meeting as Fed Chair**.

While the Fed is widely expected to keep rates steady, the true market driver will be the accompanying statement and press conference. With U.S. headline inflation running hot at a 3-year high of **4.2% YoY**, traders are desperate to know if Chair Warsh will introduce a more hawkish tone or keep the door open for late-2026 easing.

Key Themes for the Week Ahead

1. Global Policy Divergence: 5 Central Bank Decisions

We have a massive "Central Bank Festival" playing out across global currency and bond desks over a 48-hour window.

- **Federal Reserve (Wednesday):** Wide consensus for a hold, but watch the economic projections (Dot Plot) for shifting rate expectations.
- **Bank of Japan (Tuesday):** The big wildcard. Economists are heavily betting on the BoO pulling the trigger on a **25 basis point hike to 1.0%** to salvage the bleeding Japanese Yen, which has hovered near the 160 handle. This would mark the highest BoJ policy rate since 1995.
- **Bank of England (Thursday):** Expected to keep its benchmark rate frozen at **3.75%**, though persistent stagflation signs in the UK keep policy paths highly uncertain.
- **RBA (Tuesday) & SNB (Thursday):** The Reserve Bank of Australia is expected to hold at **4.35%**, potentially marking the end of their tightening loop.

2. Crucial UK Inflation Data (Wednesday)

Right before the Bank of England meets, the UK drops its May CPI data.

- **The Setup:** Given the massive global energy shocks witnessed earlier this quarter, an upside surprise in the cost of living is highly anticipated.
- **The Breakout View:** The **FTSE 100** is coiled just under a major structural resistance barrier at **10,400**. A friendly CPI print could provide the fundamental juice needed to launch a breakout toward 10,700.

3. US Consumer Resiliency (Wednesday)

Alongside the Fed decision, U.S. Retail Sales data hits the tape. Consumers are feeling the pinch, with real wage growth turning negative over the past two months due to recent fuel cost spikes. A retail sales print below the **0.5% forecast** will actively signal that consumer spending is cracking under inflationary weight.

4. Corporate & Sector Spotlight: The AI Funding Paradigm

The corporate landscape is shifting away from tech sector operational earnings and toward massive balance sheet expansion.

- **Mega Debt Issuance:** Amazon and Alphabet successfully tapped the bond markets for record non-USD denominated debt to aggressively fund multi-billion-dollar AI data centre buildouts.
- **Tech Anxiety:** While tech remains the long-term trend, the market's patience for massive capital expenditure spending with delayed profitability is thinning out. Oracle and Adobe both felt severe technical rejections last week despite raising outlooks, proving that any broad-market tech rallies this week must see flawless fundamental execution.

Trader's Note: Friday is the Juneteenth holiday in the U.S., meaning American equity and bond exchanges will be entirely closed. With major global monetary policy decisions wrapping up late Thursday, Thursday afternoon's close will look like an absolute lightning round of capital reallocation. Watch your risk parameters closely.

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