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 29, 2026

Markets are rolling into the final week of June facing a dramatic shakeup in standard holiday schedules. With Wall Street closing its doors this Friday in observance of **Independence Day**, the entire economic data schedule has been aggressively pulled forward. Traders face a jam-packed four-day trading week headlined by an early Non-Farm Payrolls report and an elite monetary gathering in Europe.

Market Backdrop: Tech Drag vs. Energy Relief

Global equity benchmarks finished last week under notable structural pressure, with the S&P 500 falling 2.0% and the tech-heavy Nasdaq sliding 4.5%. A massive surge in artificial intelligence data center demand has sent memory and storage chip costs skyrocketing, forcing mega-caps like Apple and Microsoft to raise consumer product prices.

While tech margins face near-term friction, macro books received a massive sigh of relief from the energy sector. **WTI Crude** tumbled 9% last week to close at **$69.23/barrel** as traffic aggressively rebounded through the Strait of Hormuz, restoring Persian Gulf exports to roughly 75% of pre-war levels and cooling broad systemic inflation expectations.

Key Themes for the Week Ahead

1. The Sintra Forum: Warsh Takes the Global Stage (Monday – Wednesday)

The European Central Bank's annual **Sintra Forum on Central Banking** is underway in Portugal.

- **The Main Event:** On Wednesday, newly confirmed Federal Reserve Chair **Kevin Warsh** will make his highly anticipated first international appearance on a policy panel alongside ECB President Christine Lagarde and BoE Governor Andrew Bailey.
- **What to Watch:** After recent internal Fed projections hinted at the rising prospect of a near-term interest rate hike, algorithmic traders will be scanning every syllable Warsh drops for clues on the autumn policy path.

2. Thursday Showdown: June Non-Farm Payrolls (NFP)

Because Friday is a federal holiday, the coveted **U.S. Jobs Report** lands a day early on Thursday morning.

- **The Stakes:** Following May's robust 172,000 payroll expansion, the market is looking to see if employment dynamics are cooling or remain unsustainably tight. The absolute critical metric to watch is **Average Hourly Earnings**—the primary indicator of whether wage inflation is stabilizing.

3. Eurozone Inflation Check (Wednesday)

Before the U.S. labor data steals the spotlight, the Eurozone drops its preliminary June CPI data. Thanks to the massive drop in global oil and energy prices, headline Euro Area inflation is forecast to ease to **3.0%** (down from 3.2%). However, Core CPI is sticky at **2.6%**, creating a high-stakes balancing act for the ECB's rate path.

Weekly Economic Calendar

Day	Event	Impact	Forecast / Previous
Mon	**Eurozone** EC Economic Sentiment	Medium	**94.1 (Est) / 93.5 (Prev)**
Tue	**Australia** RBA June Meeting Minutes	Medium	Policy Trajectory for the AUD
Tue	**China** NBS Manufacturing PMI (June)	High	**50.1 (Est) / 50.0 (Prev)**
Wed	**Eurozone** Flash CPI Inflation (YoY)	High	**3.0% (Est) / 3.2% (Prev)**
Wed	**U.S.** ADP Private Payrolls & ISM Manufacturing	High	Pre-NFP Labor & Factory Health
Thu	**U.S. Non-Farm Payrolls (NFP) & Unemployment**	**Critical**	**Advanced Holiday Release**
Fri	**U.S. Markets Closed** (Independence Day Obs.)	**None**	Exchange and Bank Holiday

Trading Playbook: Technical Watchlist

- **S&P 500 (SPX):** The index has retreated to **7,354** after a brief tech correction. Structural support rests heavily at **7,280**. If Thursday's payroll numbers print too hot—cementing the narrative of a hawkish Fed rate hike this autumn—expect a fast technical test of that floor.
- **WTI Crude Oil:** Having notched its lowest weekly close since February at **$69.23**, crude is testing major psychological support at $69.00. If shipping corridors remain uninterrupted, a brief consolidation period between **$68.00 and $71.50** is the base-case scenario for the week.
- **EUR/USD:** The Euro is coiling tight ahead of Eurozone CPI and Lagarde's speeches. Keep a close eye on **1.1400**; a structural failure below this zone opens the door for a deeper bearish run toward 1.1280.

Trader's Note: Thursday afternoon will see extreme "get me out" liquidity drains. Because institutions do not want to hold heavy exposure over a long, three-day holiday weekend following massive NFP and ISM releases, the closing cross on Thursday will be exceptionally volatile. Wrap up your size early.

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