

London Investment Markets – Newsletter



London Investment Markets

LIM is the exclusive, institutional-grade trading platform providing a definitive edge for CFD traders in Forex, Crypto, Equities, Indices, and Commodities.



London Investment Markets – News & Markets

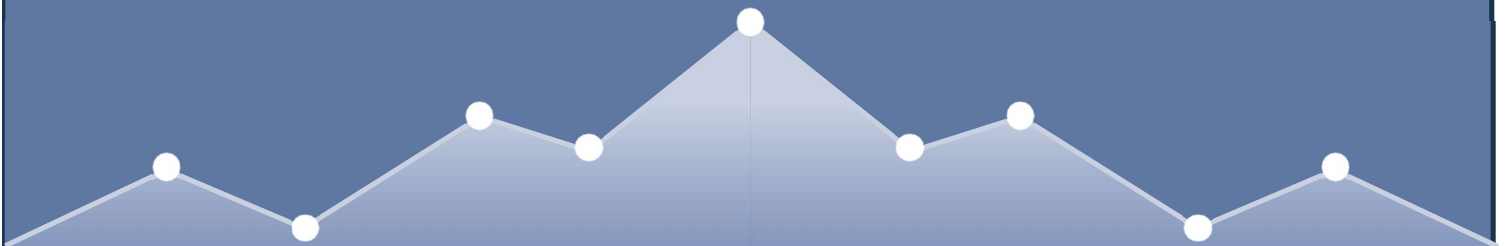
LIM keeps you informed with the latest financial news, market analysis, and economic events that move global markets.

Week Commencing: April 20, 2026

This week, the market shifts from "War Mode" to "Diplomacy Mode." Following historic concessions in Pakistan over the weekend, a potential US-Iran peace agreement is the dominant narrative. As the "geopolitical risk premium" implodes, traders are shifting their focus to a heavy week of inflation data and the first major tech earnings.

Market Backdrop: The Hormuz Reopening?

The absolute catalyst for sentiment is the potential reopening of the **Strait of Hormuz**. After President Trump signalled a finalized deal could be days away, **WTI Crude** collapsed nearly **10%** last Friday, trading back below the **\$90 handle**. If tankers resume flows this week, expect a massive relief rally in global equities and a further slide in energy-linked currencies.



Key Themes for the Week Ahead

Flash PMIs: The "Growth vs. Energy" Test (Thursday)

Thursday brings the **S&P Global Flash PMIs** for the US, UK, Eurozone, and Germany.

- **The Significance:** These are the first major indicators of how private sector growth held up during the peak of the spring energy spike.
- **What to Watch:** Look for a "divergence" between manufacturing and services. While high energy costs hurt factories, service sector resilience will dictate whether central banks stick to their "Higher for Longer" mantra.

Tesla Earnings: The AI5 Milestone (Wednesday)

Tesla (TSLA) kicks off the "Big Tech" earnings cycle on Wednesday.

- **The Numbers:** Consensus expects **\$0.37 EPS** on **\$22.71B** revenue. After missing Q1 delivery estimates (358,000 vs. 368,903), the focus is now on margins.
- **The Catalyst:** Watch for updates on the **AI5 chip**, which Elon Musk recently announced has completed its "tape-out" with 8x more compute power than the previous generation.

The Inflation "Hot Zone" (Mon-Wed)

While the US remains the focus, three other major economies report inflation data:

- **China (Monday):** The **PBoC** is expected to keep the 1-year Loan Prime Rate at **3.0%**, but any hint of further easing to support manufacturing could spark volatility in the Asian markets.
- **Canada & New Zealand (Monday):** Both release CPI figures that will reveal the initial impact of the war on domestic prices.
- **UK (Wednesday):** Headline inflation is expected to cool slightly, but with average earnings still rising, the **GBP** remains sensitive to "sticky" core figures.

Weekly Economic Calendar

Day	Event	Impact	Forecast / Previous
Mon	PBoC Interest Rate Decision	High	3.0% (Hold)
Mon	Canada & New Zealand CPI	High	Canada: +2.7% (YoY)
Tue	UK Unemployment / US Retail Sales	High	US Sales: +1.3% (Est.)
Wed	UK Inflation (CPI)	Critical	3.3% (Prev.)
Wed	Tesla (TSLA) Q1 Earnings	Critical	After Market Close
Thu	Global Flash PMIs (US, UK, EU)	Critical	Focus on Input Costs
Fri	UK Retail Sales / Japan Inflation	High	Japan Core: 1.8% (Est.)

Trading Playbook: Risk & Levels

- **Oil (WTI):** The trend has flipped from "Bullish" to "Neutral-Bearish." Support sits at **\$85.50**. If a formal peace deal is signed, a test of **\$80.00** is likely.
- **Nasdaq / S&P 500:** Both indices hit all-time highs on Friday. If **US Retail Sales** on Tuesday show consumer strength (Expected: +1.3%), the "Soft Landing" trade will be back in full force.
- **USD/JPY:** With Japan's trade surplus widening and inflation seen accelerating toward **1.8%**, watch for a potential "Yen Strength" move if the BoJ signals an end to its easing cycle earlier than expected.

Trader's Note: Fed Chair Nominee **Kevin Warsh** is scheduled to testify before Congress this week. His comments on the "cargo" and US monetary policy will be his first public outing and could trigger significant volatility in the **10-Year Treasury Yield**.

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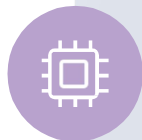
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