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: July 06, 2026

Geopolitics and a massive tech rotation are dominating the macro narrative as we head into the second half of the year. Following recent breakthroughs in the US-Iran peace framework, falling crude prices have eased long-term inflation fears. However, equity markets are showing highly split behaviour: investors are aggressively rotating out of mega-cap technology and into small-caps, financials, and healthcare.

As the "Magnificent 7" takes a breather, macro data will dictate whether this broader market rally has legs. Here is your trading playbook for the upcoming week.

Macro Calendar: The Market Drivers

The upcoming week shifts the spotlight back onto monetary policy and global economic health. Watch these key releases to gauge central bank sentiment and consumer resilience.

Monday, July 6

US ISM Services PMI (Expected: 54.1 vs 54.5 prior): The services sector accounts for roughly 80% of US GDP. Traders will scan the "prices paid" component to check if service-sector inflation is cooling.

Eurozone Retail Sales: A key gauge of European consumer health following the ECB's recent 25-basis-point interest rate hike to 2.25%.

Wednesday, July 8

Reserve Bank of New Zealand: The market widely anticipates a 25-basis-point hike to 2.5%.

FOMC Meeting Minutes (18:00 GMT): This is the premier event of the week. Under new Chair Kevin Warsh, the Fed recently left rates unchanged but adjusted its "dot plot" to project a year-end median rate of 3.8%. Traders will parse the minutes for clues on how uniform the hawkish shift is.

Thursday, July 9

China CPI (Expected: Steady at 1.2% YoY): Crucial indicator for global commodity demand and sentiment in the Asia-Pacific region.

ECB Accounts: Details from the June meeting will reveal how many more rate hikes European policymakers are planning heading into next year.

Friday, July 10

Canadian Unemployment: A major market-mover for CAD crosses, providing the latest snapshot of North American labor tightness.

Corporate Earnings: Keep an eye out for Delta Air Lines, unofficially kicking off the Q2 corporate earnings cycle.

Key Tactical Setups to Watch

1. FX: EUR/USD Pivot Zone

Following cooler US labor indicators, the Euro has staged a modest recovery. EUR/USD is holding support around **$1.1400**.

- **The Play:** Watch the 20-day Simple Moving Average around **$1.1480**. A sustained break above this level could clear a path toward **$1.1600**, while a hot US Services PMI on Monday could quickly drag the pair back to test the $1.1350 floor.

2. Commodities: Crude Oil Rebound or Breakdown?

Easing tensions along global trade routes and the Strait of Hormuz have applied downward pressure on energy markets.

- **The Play:** If OPEC's upcoming communications signal strict adherence to output quotas despite improved trade flows, look for oil to establish a firm bottom. A break below recent support, however, could fuel the broader market rotation into consumer discretionary and retail stocks.

3. Equities: The Tech-to-Value Rotation

The tech-heavy Nasdaq recently retraced roughly 7% from its highs before clawing background. Meanwhile, small-caps, financials, and traditional value sectors are outperforming.

- **The Play:** Keep an eye on Q2 earnings previews. If early reporters like Delta signal strong consumer demand alongside manageable input costs, the rotation out of concentrated AI plays and into broader market sectors is highly likely to accelerate.

Trading Note: Volatility typically spikes around FOMC minutes on Wednesday afternoons. Consider tightening stops or reducing size ahead of the 18:00 GMT release, as the market aligns its expectations for the Fed's terminal rate under the new leadership structure.

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