

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 22, 2026

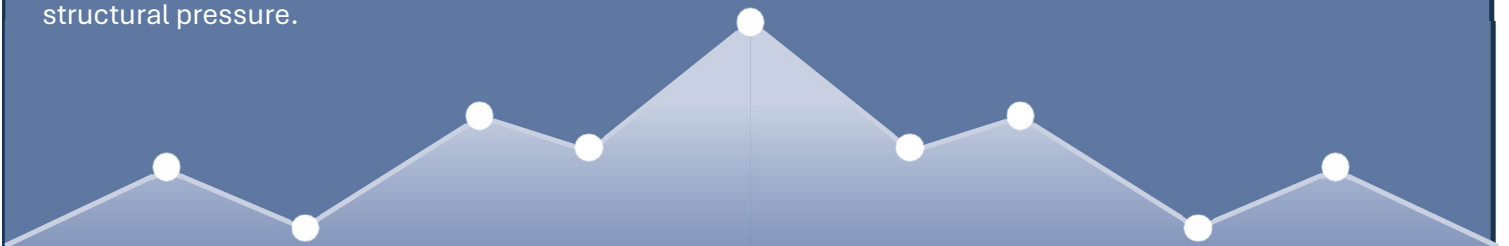
Markets are entering a critical window as the curtain begins to close on the first half of 2026. Global equity benchmarks closed out last week on a highly positive note, capitalizing on massive risk relief after an official **U.S.-Iran ceasefire** sent WTI crude tumbling down over 10% to land near **\$76/barrel**.

However, macro traders cannot afford a victory lap. This week brings the ultimate triple-threat: massive end-of-quarter institutional portfolio rebalancing, a synchronized global flash PMI release, and the ultimate U.S. inflation test under the newly aggressive "Warsh Fed."

Market Backdrop: Volatility in the Tailwinds

While the dissipation of the "Gulf Premium" oil shock has breathed life back into global indices, currency and fixed-income desks are adjusting to a new reality. Last week, newly confirmed Fed Chair Kevin Warsh delivered a surprisingly hawkish tone at his debut policy meeting.

With the U.S. bond market now actively pricing in a potential **interest rate hike as early as October**, the **U.S. Dollar Index (DXY)** has surged past 100.60, keeping precious metals and high-beta assets under strict structural pressure.



Key Themes for the Week Ahead

1. The Main Event: U.S. Core PCE (Thursday)

Thursday brings the release of the **U.S. Personal Consumption Expenditures (PCE) Price Index**, alongside the final revision of Q1 GDP.

- **The Stakes:** This is the absolute cleanest look at whether underlying consumer prices are cooling fast enough to validate the recent equity rally. If Core PCE numbers surprise to the upside, it will solidify the market’s fears of a hawkish Warsh hike in autumn, sparking a massive yield rally.

2. Synchronised Flash PMIs (Tuesday)

S&P Global drops its preliminary June Purchasing Managers' Index (PMI) data across the **Eurozone, UK, and the United States** on Tuesday.

- **What to Watch:** The U.S. Manufacturing PMI has been remarkably resilient, printing at a multi-year high of 55.3 last month. Traders will scan the June sub-indices meticulously to see if corporate input cost pressures are finally easing in response to the recent oil plunge.

3. The End-of-Quarter Liquidity Drain

Because this week wraps up both the month of June and the first half of the trading year, **institutional portfolio rebalancing** will take center stage. Large pension funds, mutual funds, and sovereign wealth managers are legally obligated to realign their asset allocations. Expect jagged, erratic volume spikes into the afternoons, completely independent of the underlying news flow.

Weekly Economic Calendar

Day	Event	Impact	Forecast / Previous
Mon	China PBoC Loan Prime Rate (1Y & 5Y)	Medium	Expected Hold at 3.00%
Mon	Canada Consumer Price Index (CPI)	High	Inflation gauge for the CAD
Tue	Global Flash PMIs (Eurozone, UK, US)	High	Crucial Growth Indicator
Wed	Australia Monthly CPI Indicator	High	Policy direction for the AUD
Thu	U.S. Core PCE Price Index (Inflation)	Critical	Fed's Absolute Favorite Metric
Thu	U.S. Final Q1 GDP Estimate	Medium	Economic Health Check
Thu	Japan Tokyo Core CPI	High	Gauging BoJ Intervention Risks



***Past performance does not reflect future results. The above is for marketing and general informational purposes only and are only projections and should not be taken as investment research, investment advice or a personal recommendation.**



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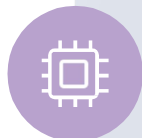
Corporate Governance

The firm is managed by a UK qualified Head of Compliance as well as English qualified lawyers. All procedures at LIM are drafted by market leading professionals.



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