

London Investment Markets – Newsletter



London Investment Markets

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London Investment Markets – News & Markets

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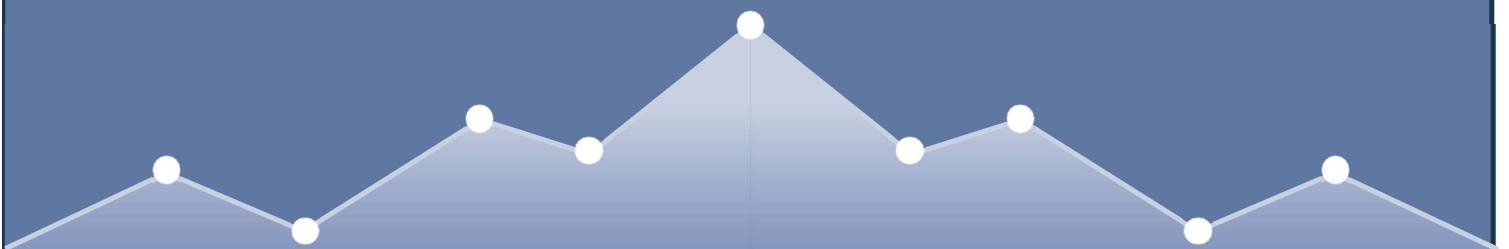
Week Commencing: May 18, 2026

Markets are bracing for an incredibly high-stakes week. We have a perfect storm on the horizon: the official debut of a new Federal Reserve Chair, a critical look at global consumer demand, and a massive artificial intelligence earnings test that could dictate the direction of equity markets for the rest of Q2.

Market Backdrop: The Warsh Regime Begins

All eyes are on Washington. Following last week's confirmation vote, **Kevin Warsh** officially takes the helm as Federal Reserve Chair today, succeeding Jerome Powell.

The market transition is happening under immense pressure. With Brent Crude stubbornly holding above **\$105/barrel** due to ongoing shipping blockades in the Middle East, the "Warsh Doctrine" will be tested immediately. Traders are watching to see if his historical preference for price stability translates into a more aggressive, hawkish stance on interest rates.



Key Themes for the Week Ahead

Global Inflation Check (Wednesday – Friday)

We get a comprehensive, 48-hour look at global pricing pressures.

- **UK CPI (Wednesday):** Analysts expect headline inflation to tick up to **3.4%**, fueled by energy costs. A hot print will complicate the Bank of England's pause strategy and likely push the **GBP** higher.
- **Japan CPI (Friday):** Tokyo's core inflation is expected to hold near **2.1%**. Any upward surprise will pressure the Bank of Japan to accelerate its normalization plans, threatening the popular Yen "carry trade."

NVDA Earnings: The Tech Litmus Test (Wednesday)

NVIDIA (NVDA) reports Q1 earnings on Wednesday after the closing bell.

- **The Stakes:** This is the most crucial corporate hurdle of the quarter. Investors are looking past current revenue and focusing entirely on the production timeline of the new **Blackwell AI architecture**.
- **The Trade:** NVIDIA's guidance will ripple across the entire tech sector. A stellar report could push the **Nasdaq 100** out of its current consolidation zone, while a disappointment risks a deeper market-wide correction.

Flash PMIs: Growth Under Pressure (Thursday)

Thursday brings the preliminary Purchasing Managers' Index (PMI) data for the US, Eurozone, and UK. This serves as a real-time health check on corporate activity. Look closely at the **Input Costs** sub-index to see how severely businesses are being squeezed by recent oil and freight spikes.

Weekly Economic Calendar

Day	Event	Impact	Forecast / Previous
Mon	Fed Chair Kevin Warsh Official First Day	Critical	Policy Transition Focus
Tue	Reserve Bank of Australia (RBA) Meeting Minutes	Medium	Policy Clues for AUD
Wed	UK Inflation (CPI)	High	3.4% (Est.) / 3.2% (Prev.)
Wed	NVIDIA (NVDA) Q1 Earnings	Critical	After Market Close
Thu	Global Flash PMIs (US, UK, EU)	High	Focus on Manufacturing
Thu	U.S. New Home Sales	Medium	620K
Fri	Japan Core CPI (Inflation)	High	2.1% (Est.)

Technical Watchlist: Key Market Levels

- **S&P 500 (SPX):** The index is coiled tightly between the **5,150** support floor and **5,280** resistance. A hawkish tone from the new Fed leadership combined with an Nvidia miss could easily force a test of the **5,080** structural support zone.
- **Gold (XAU/USD):** Gold has found a temporary home near **\$2,320**. It is caught in a tug-of-war: geopolitics are keeping a floor under prices, but rising U.S. Treasury yields are capping the upside.
- **EUR/USD:** The Euro is languishing near **1.0720**. If Eurozone PMIs on Thursday show further economic contraction relative to the US, a slide toward **1.0600** is highly probable.

Trader's Note: Expect a highly sensitive trading environment early in the week. Because Chair Warsh represents a fresh variable for monetary policy, algorithms will be scanning every single headline for keywords regarding "quantitative tightening" or "inflation targets." Keep your position sizes disciplined.

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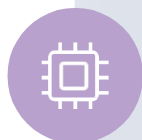
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