

After the AI Rout: Futures Lower as Chips Nurse a 6.7% Drop and Brent Tops \$113

Data as of: 2026-10-23 07:00 ET (Thursday close and overnight data) · compiled on 10/25 from past data

Key takeaways

1. The Nasdaq fell 2.60% on Thursday, its worst day since June, and the Philadelphia Semiconductor Index dropped 6.72% with all 30 members lower after Meta's spending plans revived AI-funding worries.
2. Houthi attacks on Saudi Arabia lifted Brent about 4% to \$113.17, while money rushed into Treasuries and the 10-year yield fell about 19 basis points.
3. American Express raised its 2026 EPS outlook to \$18.30–18.60 and SLB grew revenue 6% year on year; the flash PMI (9:45) and final UMich survey (10:00) are next.

This report was **compiled on October 25 from past data**, after the site launched. It reflects what was known at about 7:00 a.m. ET on Friday, October 23.

Charts are computed directly from raw prices; each shows its own data date. On the web, tap a chart for the detailed table.

The AI trade took its hardest hit in months on Thursday. Meta's results raised fresh questions about how much the industry is spending on AI infrastructure, and how much of it is borrowed, just as oil spiked on new attacks in the Gulf. Futures pointed lower again before Friday's open.

1. Overnight

Market	Move
U.S. stock futures	Lower before the open (Reuters: "Wall St set to open lower after AI-led selloff")
KOSPI (South Korea)	5,550.30, +0.30%, after falling more than 4% intraday
Brent crude (Thursday settle)	\$113.17, about +4%, highest in more than five months
WTI (Thursday settle)	\$99.47, about +2.4%
Dollar vs. yen (Thursday)	¥156.96, yen up 0.75%

- **Oil:** Houthi forces attacked Saudi targets including King Fahd International Airport in Dammam and Aramco facilities. Brent rose about 4% on Thursday.

- Aramco ordered its Dhahran headquarters evacuated, and the U.S. ordered non-essential embassy staff and families to leave Saudi Arabia.

Global markets on Thursday (10/22) and Friday morning in Asia (10/23)

Index	Thu 10/22	Fri 10/23	Note
Nikkei 225		-0.34%	Tokyo Electron -6.9% on Thursday
Hang Seng		+0.69%	Tech index +2% on Friday
Shanghai Composite	—	+0.89%	Recovered from a morning drop of more than 2%
Taiwan TAIEX		Closed	Typhoon
STOXX 600		—	Banks and chipmakers fell
DAX	-1.07%	—	Siemens Energy -8.6%, Infineon -6%
CAC 40	-1.39%	—	French 10-year yield hit its highest since 2002
FTSE 100	-0.26%	—	

U.S. markets at a glance — last 12 months

Computed from raw prices · U.S. close of 2026-10-22

S&P 500 **1Y +13.8%**

7,663 · 1W -0.7%



Nasdaq **1Y +13.1%**

26,009 · 1W -2.6%



Dow **1Y +13.2%**

52,868 · 1W +2.4%



PHLX Semis **1Y +55.9%**

10,732 · 1W -8.2%



VIX **1Y +3.8%**

19.30 · 1W +14.4%



US 10Y **1Y +0.97p**

4.953% · 1W -0.237p



Dollar Idx **1Y +3.1%**

101.63 · 1W -0.9%



Gold **1Y -1.6%**

4,044 · 1W -3.0%



WTI Crude **1Y +71.9%**

99.40 · 1W +1.5%



Name	Last	1D	1W	1M	6M	1Y
S&P 500	7,663	-0.6%	-0.7%	-1.3%	+7.4%	+13.8%
Nasdaq	26,009	-1.6%	-2.6%	-4.5%	+5.5%	+13.1%
Dow	52,868	+0.7%	+2.4%	+1.9%	+6.8%	+13.2%
PHLX Semis	10,732	-4.9%	-8.2%	-15.4%	+8.3%	+55.9%
VIX	19.30	+11.5%	+14.4%	+35.8%	+3.1%	+3.8%
US 10Y	4.953%	-0.164p	-0.237p	-0.015p	+0.659p	+0.967p
Dollar Idx	101.63	-0.1%	-0.9%	+1.0%	+3.1%	+3.1%
Gold	4,044	-2.5%	-3.0%	-6.3%	-14.4%	-1.6%
WTI Crude	99.40	+2.3%	+1.5%	+7.9%	+3.7%	+71.9%

2. Thursday's close (10/22)

Index	Close	Change
Dow Jones Industrial Average	52,867.98	+0.02%
S&P 500	7,663.43	-1.21%
Nasdaq Composite	26,008.86	-2.60% (worst day since June)
Philadelphia Semiconductor Index	10,731.98	-6.72% (all 30 members lower)

Why it fell: Meta beat revenue estimates but reported negative quarterly free cash flow and sharply higher spending plans. That fed a broader worry that companies borrowing to build AI capacity face higher costs while interest rates stay high. Money moved into Treasuries. The Dow held flat thanks to gains in Procter & Gamble (+5.6%) and Lockheed Martin (+7.0%), which both reported before the open.

Stock	Close (\$)	Change
AMD	507.93	-8.10%
Meta (META)	648.85	-6.98%
Micron (MU)	856.49	-6.26%
Amazon (AMZN)	250.38	-4.57%
Nvidia (NVDA)	212.21	-4.40%
Broadcom (AVGO)	323.24	-4.31%
Alphabet (GOOGL)	324.22	-3.15%
Tesla (TSLA)	374.58	-3.08%
Palantir (PLTR)	196.19	-2.74%
Microsoft (MSFT)	521.08	-2.23%
Apple (AAPL)	348.22	+1.23%

Closing prices from Stockanalysis.com daily history.

Big Tech 1D performance

Computed from raw prices · U.S. close of 2026-10-22



Name	Close	1D	1W	1M	6M	1Y	YTD	vs 1Y high	Volume vs 20D avg
Nvidia (NVDA)	\$212.21	-4.4%	-2.3%	-7.3%	+6.5%	+18.0%	+14.1%	-11.3%	1.2x
Tesla (TSLA)	\$374.58	-3.1%	+3.3%	-1.1%	+0.2%	-14.7%	-16.7%	-23.5%	1.4x
Alphabet (GOOGL)	\$324.22	-3.1%	-7.2%	-7.7%	-4.2%	+29.2%	+3.8%	-19.4%	1.1x
Apple (AAPL)	\$348.22	+1.2%	+1.8%	+2.5%	+27.6%	+35.2%	+28.4%	+0.0%	1.2x
Microsoft (MSFT)	\$521.08	-2.2%	-3.4%	+4.6%	+25.8%	+0.9%	+8.4%	-4.1%	1.0x
Amazon (AMZN)	\$250.38	-4.6%	-1.7%	-1.8%	-1.8%	+14.9%	+8.5%	-11.8%	1.4x
Meta (META)	\$648.85	-7.0%	-11.9%	-11.9%	-1.4%	-11.2%	-1.4%	-16.6%	2.1x
Broadcom (AVGO)	\$323.24	-4.3%	-6.1%	-11.3%	-22.8%	-4.3%	-6.1%	-32.6%	1.3x
Palantir (PLTR)	\$196.19	-2.7%	-2.1%	+6.1%	+38.6%	+11.8%	+10.4%	-6.2%	1.0x
Nasdaq-100 ETF (QQQ)	\$704.47	-2.9%	-3.2%	-5.8%	+8.4%	+16.9%	+15.1%	-7.3%	1.7x

Nvidia 1Y +18.0%
212.21 · 1W -2.3%



Tesla 1Y -14.7%
374.58 · 1W +3.3%



Alphabet 1Y +29.2%
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Apple 1Y +35.2%
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Microsoft 1Y +0.9%
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Amazon 1Y +14.9%
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Meta 1Y -11.2%
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Broadcom 1Y -4.3%
323.24 · 1W -6.1%

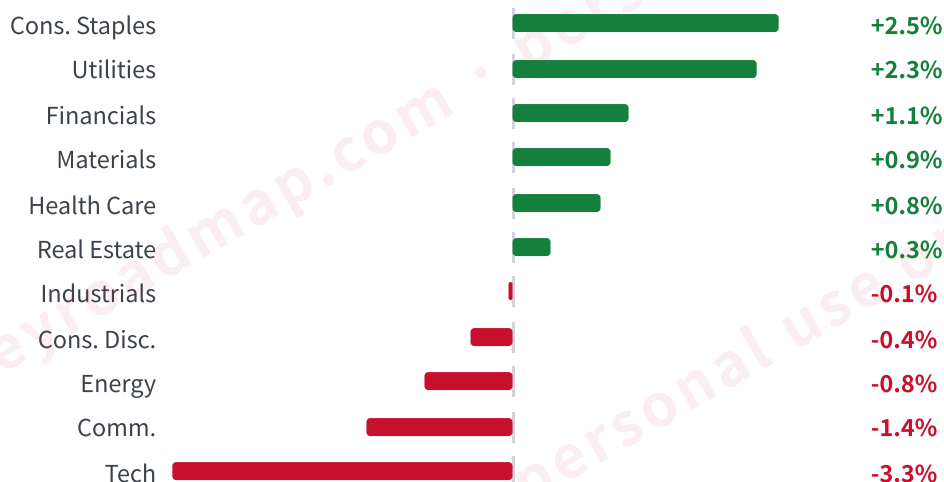


Palantir 1Y +11.8%
196.19 · 1W -2.1%



U.S. sector ETFs 1D performance

Computed from raw prices · U.S. close of 2026-10-22



Name	Last	1D	1W	1M	6M	1Y
Tech (XLK)	182.37	-3.3%	-3.6%	-6.6%	+17.0%	+26.5%
Comm. (XLC)	107.43	-1.4%	-4.5%	-4.6%	-8.5%	-7.9%
Cons. Disc. (XLY)	115.01	-0.4%	+3.1%	+2.4%	-3.3%	-2.6%
Financials (XLF)	56.66	+1.1%	+2.5%	+3.9%	+9.4%	+7.5%
Health Care (XLV)	181.32	+0.8%	+4.2%	+6.7%	+23.9%	+25.2%
Energy (XLE)	67.58	-0.8%	+1.5%	+8.3%	+18.6%	+55.9%
Industrials (XLI)	166.71	-0.1%	-0.2%	-2.1%	-2.5%	+8.6%
Materials (XLB)	51.71	+0.9%	+4.1%	+2.3%	-0.2%	+16.3%
Utilities (XLU)	42.86	+2.3%	+2.7%	+5.8%	-4.5%	-6.4%
Cons. Staples (XLP)	89.98	+2.5%	+4.5%	+8.8%	+9.6%	+13.0%
Real Estate (XLRE)	42.53	+0.3%	+2.5%	+0.1%	-2.1%	+0.1%

Sectors on Thursday (Select Sector SPDR ETFs as a proxy)

Best		Worst	
Consumer Staples (XLP)	+3.31%	Technology (XLK)	-3.29%
Utilities (XLU)	+2.07%	Communication Services (XLC)	-1.42%
Health Care (XLV)	+1.32%	Industrials (XLI)	-0.94%
Financials (XLF)	+1.09%	Energy (XLE)	-0.87%
Real Estate (XLRE)	+1.09%	Consumer Discretionary (XLY)	-0.45%

Money moved from technology into defensive sectors such as staples and utilities; one trader quoted by Reuters called it a classic rotation day.

Biggest movers on Thursday

Stock	Move	Why
Moderna (MRNA)	-17.6%	Detailed late-stage melanoma vaccine data appeared to leak before a medical conference; the trial met its main goal, but shares fell after a big run-up
Lam Research (LRCX)	-11.8%	Warned that supply-chain and clean-room constraints could last into 2027
KLA (KLAC)	-8.9%	
Marvell (MRVL)	-8.7%	Chip selloff after Lam's warning
Spotify (SPOT)	+11.1%	
Blackstone (BX)	+8.4%	Distributable earnings above estimates
CSX	+6.8%	
Union Pacific (UNP)	+3.6%	Record third-quarter results

3. Earnings recap

Company (timing)	Results	Guidance / notes
American Express (Fri, before the open)	Record revenue of \$20.1 billion, up 9% year on year; diluted EPS \$5.42 (adjusted \$4.68, up 13%)	Raised 2026 EPS outlook to \$18.30–18.60 (adjusted \$17.60–17.90); on track for about 10% revenue growth. Reuters reported plans to cut about 5% of its workforce.
SLB (Fri, before the open)	Revenue \$9.45 billion, up 6% year on year and 5% from the prior quarter; EPS excluding charges and credits \$0.64 (GAAP \$0.49)	2026 capital spending still about \$2.5 billion; quarterly dividend \$0.295
Meta (Wed, after the close)	Revenue \$64.6 billion, +26%; diluted EPS \$3.83 (\$7.40 excluding a \$9.89 billion legal charge)	Q4 revenue outlook \$73–76 billion; 2026 capex narrowed to \$135–145 billion; free cash flow -\$2.12 billion . Stock -6.98% Thursday
Tesla (Wed, after the close)	Revenue \$28.05 billion (about flat); adjusted EPS \$0.48 (GAAP \$0.22); 486,532 deliveries	Automotive gross margin 18.5%; free cash flow \$1.53 billion; energy storage 13.7 GWh. Stock -3.08% Thursday
IBM (Wed, after the close)	Revenue \$17.10 billion, +5%; operating EPS \$2.95, +11%	Kept 2026 constant-currency revenue growth at 4–5%
Lam Research (Wed, after the close)	Revenue \$8.22 billion, +54%; non-GAAP EPS \$2.20	December-quarter revenue outlook \$8.6 billion ±\$0.4 billion. Stock -11.8% Thursday on its supply warning

Company (timing)	Results	Guidance / notes
Procter & Gamble (Thu, before the open)	Revenue \$23.3 billion, +4% (organic +4%); core EPS \$2.00, +1%	Kept core EPS growth of 0–3% for fiscal 2027. Stock +5.6%
Lockheed Martin (Thu)	Sales \$20.71 billion, +11%; EPS \$7.97	Raised 2026 sales to \$80–82 billion and EPS to about \$30.35–30.75. Stock +7.0%
Union Pacific (Thu)	Revenue \$7.20 billion, +15%; adjusted EPS \$3.53, +15%	Reaffirmed high-single-digit EPS growth for 2026
Blackstone (Thu)	Distributable earnings \$1.32 per share, -13%	Dividend \$1.12 per share. Stock +8.4%
Western Digital (Thu, after the close)	Revenue \$4.38 billion, +55%; non-GAAP EPS \$4.64	Next-quarter revenue outlook \$5.1 billion ± \$0.1 billion

- Of 111 S&P 500 companies that had reported, 83% beat profit estimates (LSEG data cited by Reuters).
- **Meta also announced a new non-voting Class C stock:** every existing share will receive one Class C share as a dividend (effective January 19, 2027), which works like a 2-for-1 split without changing voting power. The company said the shares could be used to raise capital, pay employees and fund acquisitions.

4. Premarket movers

Watch American Express and SLB at the open after their reports.

5. Today's calendar (ET)

Time	Event	Note
Before the open	American Express, SLB, Infosys, Autoliv, First Citizens earnings	
9:45 a.m.	S&P Global flash U.S. PMI (October)	
10:00 a.m.	University of Michigan consumer sentiment, final October	Preliminary reading was 46.3; watch 1-year inflation expectations

- The Fed is in its quiet period ahead of the October 27–28 FOMC meeting, so no Fed speakers are scheduled.

6. Unusual volume (U.S.)

Our screen looks for stocks whose 20-day average volume is at least double the previous 20 days while the price moved less than 3% over 20 days. As of Thursday's close, **no stocks** in the 523-name universe (S&P 500, Nasdaq-100 and others) met the rule. This is a description of trading activity, not a signal.

Volume surging while price is flat (U.S. large caps)

Computed from raw prices · U.S. close of 2026-10-22

Up 300%+	0
Up 200-300%	0
Up 100-200%	0

Average volume over the last 20 sessions vs. the prior 20, among stocks whose 20-session price change is within $\pm 3\%$. Not a directional signal.

Volume increase	Stocks	Tickers (up to 10)
Up 300%+	0	none
Up 200-300%	0	none
Up 100-200%	0	none

7. Reddit mentions and crypto

Stock	Mentions vs. a day earlier	Thursday move
Western Digital (WDC)	11.4x	-6.43%
Hertz (HTZ)	5.3x	+5.31%
IBM	4.5x	+0.29%
Moderna (MRNA)	4.4x	-17.57%
ServiceNow (NOW)	3.6x	+2.53%

Being talked about is not a reason to buy or sell.

Reddit mention surges (x vs 24h ago)

Computed from raw prices · as of 2026-10-22



Name	Mentions	x	1D	1W
WDC · Western Digital	57	11.4x	-6.4%	-0.6%
HTZ · Hertz	53	5.3x	+5.3%	+19.1%
IBM · IBM	86	4.5x	+0.3%	+7.7%
MRNA · Moderna	128	4.4x	-17.6%	-14.3%
NOW · ServiceNow	29	3.6x	+2.5%	+5.7%

- **Bitcoin spot ETFs:** net outflow of **\$635.6 million** on Thursday, including \$254.1 million from BlackRock's IBIT. That reversed inflows of more than \$500 million on both Monday and Wednesday.
- **Ether spot ETFs:** October outflows have passed \$1 billion; Thursday's outflow was \$110.6 million (Farside).
- **Prices on Thursday afternoon (ET):** Bitcoin about \$81,260 (-3.3% in 24 hours), Ether about \$2,381 (-3.6%), XRP \$1.30 (-6.4%), Solana about \$103 (-3.3%). Bitcoin had touched about \$85,000 the day before.
- **Liquidations:** about \$430–460 million of leveraged positions were wiped out in 24 hours, roughly 90% of them bets on rising prices (CoinGlass data).

Major cryptocurrencies — last 12 months

Computed from raw prices · as of 2026-10-22

Bitcoin

1Y -24.5%

81,313 · 1W -1.0%



Ethereum

1Y -37.4%

2,383 · 1W -2.4%



Solana

1Y -42.6%

103.48 · 1W -1.8%



XRP

1Y -44.9%

1.30 · 1W -2.4%



Name	Last	1D	7D	30D	182D	365D
Bitcoin	81,313	-3.2%	-1.0%	-5.6%	+3.9%	-24.5%
Ethereum	2,383	-3.5%	-2.4%	-13.4%	+2.2%	-37.4%
Solana	103.48	-3.1%	-1.8%	-12.7%	+20.1%	-42.6%
XRP	1.30	-4.5%	-2.4%	-17.2%	-9.5%	-44.9%

Crypto Fear & Greed Index

Computed from raw prices · as of 2026-10-22



0 = extreme fear, 100 = extreme greed. It describes mood, not direction.

Source	Now	Rating	1 week ago	1 month ago
alternative.me Crypto Fear & Greed Index	68	Greed	53	78

8. What strategists said (Thursday)

Who	View
Matthew Maley, Miller Tabak	Investors increasingly doubt the payoff from AI spending; big companies can fund it, but rising financing costs could squeeze smaller AI firms (Reuters)
Robert Pavlik, Dakota Wealth	Meta's heavy spending and negative free cash flow show the investment is not yet earning enough revenue (Reuters)
Joe Saluzzi, Themis Trading	Money moved out of AI stocks into Treasuries and large Dow stocks — a classic rotation day (Reuters)
Tal Liani, Bank of America	Keeps a buy rating on CoreWeave but expects it to need about \$20 billion of new funding (Reuters)

- A Reuters poll published October 20 found 94 of 100 economists expect the Fed to hold rates next week, and all 100 expect a hike in December.

9. Big investors

No new 13F filings from the investors we track this week. Third-quarter 13Fs are due by mid-November. See current holdings and shared moves on the [Big Investors](#) page.

10. Korea Corner

- KOSPI fell more than 4% early, then closed up 0.30% at 5,550.30 after **SK Hynix** said it had stopped reviewing a U.S. listing of its NAND unit Solidigm. SK Hynix rose more than 4%; **Samsung Electronics** gained 0.47% to ₩215,500.
- The Bank of Korea held its base rate at 3.00% on Thursday, its first pause after hikes in July and August.
- USD/KRW was ₩1,324.6 at 3:30 p.m. Seoul time.

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