

Brazil Shock Meets Fed Week: Brazilian ADRs Sink Premarket as Oil Eases From a Six-Month High

Data as of: 2026-10-26 06:30 ET (Friday Oct 23 close and Monday overnight data)

Key takeaways

1. Brazilian ADRs fell 20% to 46% before the bell after President Lula won Sunday's runoff with 51.8%, while U.S. stock futures edged higher.
2. Brent eased about 1.3% to \$115.23 in early Monday trade after Friday's \$116.72 settle, the highest since April, as Qatari mediators traveled to Tehran.
3. The FOMC meets Tuesday and Wednesday with a hold priced at about 88-91%; today brings a \$69 billion 2-year note auction at 1:00 PM and Cadence and Nucor after the close.

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

A heavy week opens with a shock from Latin America. Brazilian stocks listed in New York tumbled before the bell after President Lula's comeback win, while oil pulled back from Friday's six-month high on signs of diplomacy with Iran. The Fed decides Wednesday, and Microsoft, Alphabet, Amazon and Intel report later in the week.

0. Last report check

- **Brent above \$115** (flagged Sunday): Brent settled at \$116.72 on Friday and was trading near \$115 early Monday, still above that line.
- **Fed hold odds of roughly 87-91%** (flagged Sunday): unchanged at about 88-91% in reports from Oct 25-26.
- The FOMC, Big Tech earnings and Thursday's GDP and PCE data are still ahead.

1. Overnight

Market	Level	Move	Note
S&P 500 futures	—	about +0.2% to +0.4%	AP, TipRanks (5:31 AM ET), IC Markets
Dow futures	—	about +0.4% to +0.5%	AP, TipRanks
Nasdaq 100 futures	—	about +0.25% by 5:31 AM ET	Slightly lower in earlier European trade (XTB, FXStreet)

Market	Level	Move	Note
U.S. 10-year Treasury yield	4.974%	down from about 4.99% on Friday	Reuters, Asian hours
U.S. 2-year Treasury yield	4.686% (Friday)	+5 bp on Friday	
Brent crude	\$115.23	-\$1.49 (-1.3%)	Reuters, 07:44 GMT; Friday settle \$116.72
WTI crude	\$101.51	-\$1.76 (-1.7%)	Reuters, 07:44 GMT; Friday settle about \$103.27
Spot gold	\$4,009.87	+0.4%	Reuters; down about 4% last week
Spot silver	\$54.19	+0.6%	Reuters
Dollar index	101.64	slightly lower	Reuters
Dollar vs. yen	about ¥157	little changed	Reuters, AP
Euro	about \$1.122	+0.16%	Reuters

- **Oil:** Prices dipped after Reuters reported, citing an official, that Qatari mediators traveled to Tehran on Sunday in coordination with the U.S. Over the weekend the Houthis claimed strikes on Saudi oil facilities and Riyadh's airport; Saudi Arabia said it intercepted missiles and drones, and no damage to oil infrastructure has been independently confirmed. Brent gained about 6% last week.
- Abu Dhabi's Murban grade rose about 3% to above \$118, a premium for crude that avoids Hormuz.
- Some Brent quotes near \$109-110 this morning appear to reflect a different contract month; we use Reuters' front-month figures.

Asia (Monday close) and Europe (this morning)

Index	Level	Move	Note
Nikkei 225	62,189.65	-0.8%	Third straight decline; chip stocks weak
KOSPI	5,469.47	-1.46%	Caution before SK Hynix and Samsung results
KOSDAQ	727.21	-3.26%	
Hang Seng	about 23,210	about +0.5%	Oil producers higher (PetroChina +4.1%), chips lagged
Shanghai Composite	3,697.52	+0.2%	Onshore yuan at its strongest since June 2022
Taiwan TAIEX	—	Closed	
STOXX 600	636.26	flat	08:09 GMT; energy -0.7%, travel +1%

- In Europe, Galp fell 8.5% despite higher profit, while Computacenter rose 6.8% after raising guidance (Reuters).

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

Computed from raw prices · U.S. close of 2026-10-23

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

7,624 · 1W -0.5%



Nasdaq

1Y +14.1%

25,955 · 1W -0.7%



Dow

1Y +12.1%

52,215 · 1W +0.4%



PHLX Semis

1Y +61.4%

10,779 · 1W -3.2%



VIX

1Y +18.8%

19.45 · 1W -2.7%



US 10Y

1Y +1.03p

4.988% · 1W -0.110p



Dollar Idx

1Y +2.9%

101.81 · 1W -0.0%



Gold

1Y -1.4%

4,008 · 1W -4.1%



WTI Crude

1Y +76.5%

103.27 · 1W +1.8%



Name	Last	1D	1W	1M	6M	1Y
S&P 500	7,624	-0.5%	-0.5%	-1.0%	+6.4%	+13.8%
Nasdaq	25,955	-0.2%	-0.7%	-3.6%	+4.5%	+14.1%
Dow	52,215	-1.2%	+0.4%	+1.7%	+6.1%	+12.1%
PHLX Semis	10,779	+0.4%	-3.2%	-13.7%	+2.5%	+61.4%
VIX	19.45	+2.2%	-2.7%	+24.1%	+9.1%	+18.8%
US 10Y	4.988%	+0.035p	-0.110p	-0.174p	+0.678p	+1.035p
Dollar Idx	101.81	+0.2%	-0.0%	+0.5%	+3.4%	+2.9%
Gold	4,008	-1.3%	-4.1%	-6.8%	-15.5%	-1.4%
WTI Crude	103.27	+3.8%	+1.8%	+9.2%	+9.4%	+76.5%

2. Friday's close (10/23)

Index	Close	Day	Week
Dow Jones Industrial Average	52,215.16	-1.23%	+0.41% (third weekly gain)
S&P 500	7,623.68	-0.52%	-0.47% (second weekly loss)
Nasdaq Composite	25,955.34	-0.21%	-0.71%
Russell 2000	2,775.90	-0.29%	+2.0%
Philadelphia Semiconductor Index	10,779.46	+0.44%	—
VIX	19.45	+2.2%	—

What moved markets: Oil rose for a second day after attacks in Saudi Arabia, lifting the S&P 500 energy sector about 2.5% to a record, while consumer staples, consumer discretionary and financials each fell more than 1%. Chip stocks steadied after Thursday's rout. The Dow lost more than 650

points, partly on drops in American Express and telecom stocks. NYSE decliners outnumbered advancers 1.72 to 1 (Reuters).

Sectors (sector SPDR ETFs, Friday)

Sector	ETF	Day	Week
Energy	XLE	+2.60%	+1.6%
Technology	XLK	+0.49%	-0.1%
Real Estate	XLRE	+0.12%	+1.0%
Utilities	XLU	-0.72%	+0.8%
Materials	XLB	-0.74%	+0.8%
Health Care	XLV	-1.11%	+1.5%
Industrials	XLI	-1.27%	-1.9%
Financials	XLF	-1.32%	+0.7%
Consumer Discretionary	XLY	-1.66%	+0.6%
Communication Services	XLC	-1.8%	-4.4%
Consumer Staples	XLP	-1.92%	+0.7%

Daily figures from Stockanalysis.com.

U.S. sector ETFs 1D performance

Computed from raw prices · U.S. close of 2026-10-23



Name	Last	1D	1W	1M	6M	1Y
Tech (XLK)	183.23	+0.5%	-0.1%	-5.9%	+14.4%	+28.4%
Comm. (XLC)	105.51	-1.8%	-4.4%	-7.4%	-8.7%	-8.8%
Cons. Disc. (XLY)	113.10	-1.7%	+0.6%	+2.5%	-4.7%	-4.7%
Financials (XLF)	55.90	-1.3%	+0.7%	+2.5%	+8.7%	+6.6%
Health Care (XLV)	179.28	-1.1%	+1.4%	+5.5%	+24.3%	+22.8%
Energy (XLE)	69.33	+2.6%	+1.6%	+10.8%	+21.9%	+57.9%
Industrials (XLI)	164.62	-1.3%	-1.9%	-2.5%	-4.5%	+7.7%
Materials (XLB)	51.31	-0.7%	+0.8%	+3.3%	-1.2%	+16.2%
Utilities (XLU)	42.56	-0.7%	+0.8%	+8.1%	-7.8%	-5.8%
Cons. Staples (XLP)	88.26	-1.9%	+0.7%	+8.0%	+6.0%	+10.7%
Real Estate (XLRE)	42.57	+0.1%	+1.0%	+2.2%	-2.9%	+0.1%

Big Tech and chips (Friday close)

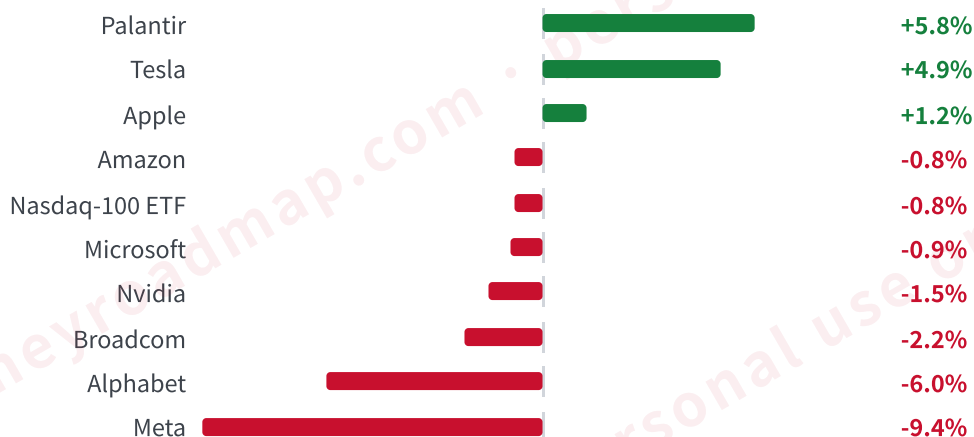
Stock	Close (\$)	Fri	Thu	Week
Micron (MU)	877.55	+2.46%	-6.26%	-0.2%
AMD	516.79	+1.74%	-8.10%	-2.3%
Microsoft (MSFT)	524.51	+0.66%	-2.23%	-0.9%
Palantir (PLTR)	196.75	+0.29%	-2.74%	+5.8%
Apple (AAPL)	347.73	-0.14%	+1.23%	+1.2%
Broadcom (AVGO)	321.68	-0.48%	-4.31%	-2.2%
Nvidia (NVDA)	210.96	-0.59%	-4.40%	-1.5%

Stock	Close (\$)	Fri	Thu	Week
Tesla (TSLA)	372.22	-0.63%	-3.08%	+4.9%
Amazon (AMZN)	248.00	-0.95%	-4.57%	-0.8%
Meta (META)	642.62	-0.96%	-6.98%	-9.4%
Alphabet (GOOGL)	320.21	-1.24%	-3.15%	-6.0%

Closing prices from Stockanalysis.com daily history. Weekly change is from the Oct 16 close.

Big Tech 1W performance

Computed from raw prices · U.S. close of 2026-10-23



Name	Close	1D	1W	1M	6M	1Y	YTD	vs 1Y high	Volume vs 20D avg
Nvidia (NVDA)	\$210.96	-0.6%	-1.5%	-6.5%	+1.5%	+16.1%	+13.4%	-11.8%	0.8x
Tesla (TSLA)	\$372.22	-0.6%	+4.9%	-2.1%	-1.1%	-17.1%	-17.2%	-24.0%	0.9x
Alphabet (GOOGL)	\$320.21	-1.2%	-6.0%	-5.2%	-6.9%	+26.9%	+2.5%	-20.4%	0.7x
Apple (AAPL)	\$347.73	-0.1%	+1.2%	+3.2%	+28.5%	+34.5%	+28.3%	-0.1%	1.0x
Microsoft (MSFT)	\$524.51	+0.7%	-0.9%	+4.8%	+24.0%	+1.6%	+9.1%	-3.5%	0.6x
Amazon (AMZN)	\$248.00	-1.0%	-0.8%	-0.5%	-6.1%	+12.2%	+7.4%	-12.7%	0.7x
Meta (META)	\$642.62	-1.0%	-9.4%	-13.6%	-4.6%	-12.2%	-2.4%	-17.4%	0.7x
Broadcom (AVGO)	\$321.68	-0.5%	-2.2%	-9.4%	-23.7%	-5.9%	-6.5%	-33.0%	0.7x
Palantir (PLTR)	\$196.75	+0.3%	+5.8%	+2.6%	+37.5%	+9.0%	+10.7%	-5.9%	0.8x
Nasdaq-100 ETF (QQQ)	\$704.40	-0.0%	-0.8%	-5.0%	+6.3%	+15.9%	+15.1%	-7.3%	0.8x

Nvidia 1Y +16.1%
210.96 · 1W -1.5%



Tesla 1Y -17.1%
372.22 · 1W +4.9%



Alphabet 1Y +26.9%
320.21 · 1W -6.0%



Apple 1Y +34.5%
347.73 · 1W +1.2%



Microsoft 1Y +1.6%
524.51 · 1W -0.9%



Amazon 1Y +12.2%
248.00 · 1W -0.8%



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642.62 · 1W -9.4%



Broadcom 1Y -5.9%
321.68 · 1W -2.2%



Palantir 1Y +9.0%
196.75 · 1W +5.8%

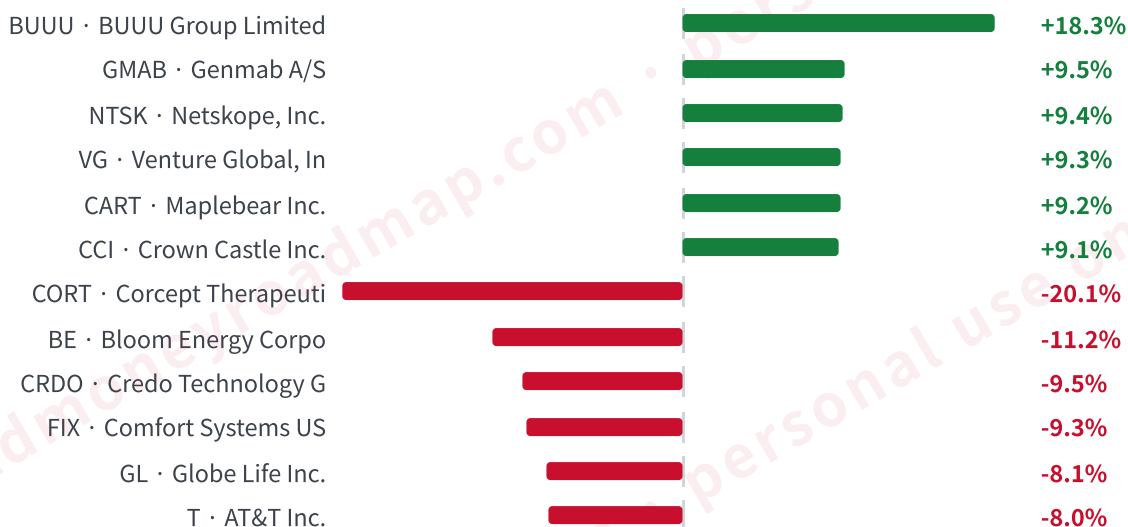


Biggest movers on Friday

Stock	Move	Why
Crown Castle (CCI)	+9.1%	Reports that SpaceX is seeking to lease U.S. cell sites for a mobile service; American Tower rose about 4%
CrowdStrike (CRWD)	+8.3%	Cybersecurity stocks rallied
SLB	+7.1%	Q3 results and higher oil (see Section 3)
Palo Alto Networks (PANW)	+7.2%	Cybersecurity rally
Bloom Energy (BE)	-11.2%	Fell after its quarterly report despite raised guidance
Comfort Systems (FIX)	-9.3%	Results gave no clear outlook; CFO retiring
AT&T (T) / T-Mobile (TMUS)	about -8% each	Worry about competition from a SpaceX mobile service
Deckers (DECK)	-4.9%	Mixed fiscal Q2 results

Biggest U.S. movers (market cap \$5B+)

Computed from raw prices · U.S. close of 2026-10-23



Name	1D	Close	Mkt cap	Volume vs 20D avg
BUUU · BUUU Group Limited	+18.3%	\$53.90	\$10.2B	0.2x
GMAB · Genmab A/S	+9.5%	\$43.79	\$26.9B	4.1x
NTSK · Netskope, Inc.	+9.4%	\$24.28	\$9.9B	1.5x
VG · Venture Global, Inc.	+9.3%	\$14.00	\$35.0B	1.6x
CART · Maplebear Inc.	+9.2%	\$56.44	\$13.4B	4.0x
CCI · Crown Castle Inc.	+9.1%	\$85.97	\$37.6B	4.2x
CORT · Corcept Therapeutics Inc.	-20.1%	\$85.86	\$9.3B	2.5x
BE · Bloom Energy Corporation	-11.2%	\$193.30	\$57.1B	2.2x
CRDO · Credo Technology Group Holdings Ltd.	-9.5%	\$147.29	\$27.7B	1.7x
FIX · Comfort Systems USA, Inc.	-9.3%	\$1,161	\$40.9B	3.3x
GL · Globe Life Inc.	-8.1%	\$154.79	\$11.9B	3.2x
T · AT&T Intellectual Property Inc.	-8.0%	\$20.93	\$141.0B	2.3x

3. Earnings recap

Company	Reported	Results (company release)	Guidance	Stock on Friday
American Express (AXP)	Fri, before the open	Record revenue net of interest expense of \$20.1B (+9%); EPS \$5.42, or \$4.68 excluding a \$982M pre-tax gain on its GBTG stake sale net of restructuring	Raised 2026 EPS outlook to \$18.30-18.60	About -3.7% to -4%; plans to cut about 5% of its workforce (AP)

Company	Reported	Results (company release)	Guidance	Stock on Friday
SLB	Fri, before the open	Revenue \$9.45B (+6% y/y); EPS \$0.49, or \$0.64 excluding charges and credits	Kept 2026 capital investment at about \$2.5B	About +7%

- **This morning:** Verizon reports before the open, with its call at 8:30 AM ET. Cemex is also scheduled.

4. Premarket movers (Monday)

Stock	Premarket move	Why
XP Inc. (XP)	-46%	
Inter & Co (INTR)	-35%	
StoneCo (STNE)	-34%	
PagSeguro (PAGS)	-29%	
Bradesco (BBD)	-28%	
Itau Unibanco (ITUB)	-26% to -28%	Lula's re-election
Nu Holdings (NU)	-24%	
Sabesp (SBS)	-21%	
Xencor (XNCR)	+27%	
Surgery Partners (SGRY)	+21%	
Micron (MU)	+1.4%	

- **Brazil background:** Lula took 51.79% to Flavio Bolsonaro's 48.21% with all votes counted, the first time since 1985 that a second-place first-round finisher won (AP, Rio Times). Bolsonaro's camp is seeking to have the result annulled over extended voting hours. A Tokyo-listed Brazil ETF fell as much as about 15-16% in Asian trading (Bloomberg, investingLive, XTB). Brazil's markets open later this morning.
- Premarket figures above are snapshots from about 5:00-5:50 AM ET and can change sharply before the open.

5. Today's calendar (ET)

Time	Event	Note
Before the open	Verizon earnings (call 8:30 AM), Cemex	
8:30 AM	Chicago Fed National Activity Index (Sep)	No consensus reported

Time	Event	Note
10:30 AM	Dallas Fed manufacturing survey (Oct)	
11:30 AM	13- and 26-week bill auctions	Usual slot
1:00 PM	2-year note auction, \$69 billion	Demand test with yields near 4.7%
After the close	Cadence (EPS est. \$2.05), Nucor (\$5.71-5.84), Welltower (\$1.64), Public Storage, Hartford, Celestica, Amkor, Rambus, Brown & Brown, Principal Financial	
Fed speakers	None	Pre-meeting quiet period; FOMC meets Oct 27-28

Rest of the week (key items): Tuesday — Coca-Cola, Boeing, UPS, PayPal before the open; NXP and Visa after; \$70B 5-year auction. Wednesday 2:00 PM — **FOMC decision** (press conference 2:30 PM); Microsoft and Alphabet after the close. Thursday 8:30 AM — Q3 GDP and September PCE; ECB at 9:15 AM; Amazon and Intel after the close.

- **Fed pricing:** CME FedWatch showed about 88-91% odds of a hold at 3.75-4.00% (Schwab Network, FXEmpire, FXStreet). Odds of a December hike were reported between 68% and 80%, with most reports at 76-80%.

6. Unusual volume screen (U.S.)

No U.S. large-cap stock met our screen as of Friday's close (20-day average volume up 100% or more versus the prior 20 days, with the price within $\pm 3\%$ over 20 days). Crown Castle, Genmab and Maplebear traded about 4 times their 20-day average volume on Friday, but with large price moves.

Volume surging while price is flat (U.S. large caps)		Computed from raw prices · U.S. close of 2026-10-23	
	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. Crypto

Coin	Price (Mon morning)	Note
Bitcoin (BTC)	about \$80,200-80,400	Briefly fell below \$80,000 on Saturday (lows near \$79,100-79,200)
Ether (ETH)	about \$2,320-2,330	About -0.9% in early Asian trade (Investing.com)
XRP	about \$1.28-1.29	
Solana (SOL)	about \$101.4	

- **Weekend:** Long positions worth about \$440-550 million were liquidated in 24 hours as bitcoin dipped below \$80,000 (CoinGlass data). Risk appetite was weighed by oil, high yields and Fed-week caution.
- **Spot ETF flows (Farside, \$ millions):** Bitcoin ETFs -137.9 on Friday and +401.2 for the week; ether ETFs +4.4 on Friday and -220.7 for the week.

Altcoins with the largest 24-hour trading volume (excluding BTC, ETH, XRP, SOL and stablecoins)

Coin	Price	24h volume	Reason
BNB	\$738.40	\$1.20B	
Zcash (ZEC)	\$1,232.01	\$748M	NU7 network upgrade planned for November
Hyperliquid (HYPE)	\$77.01	\$667M	
Dogecoin (DOGE)	\$0.0771	\$455M	
Tron (TRX)	\$0.331	\$349M	
Chainlink (LINK)	\$11.45	\$209M	

Volumes from CoinMarketCap at the time of writing.

Major cryptocurrencies — last 12 months

Computed from raw prices · as of 2026-10-23

Bitcoin

1Y -27.9%

80,456 · 1W -1.9%



Ethereum

1Y -40.6%

2,347 · 1W -2.6%



Solana

1Y -47.6%

101.60 · 1W -2.3%



XRP

1Y -50.0%

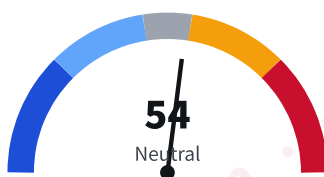
1.30 · 1W -0.5%



Name	Last	1D	7D	30D	182D	365D
Bitcoin	80,456	-0.4%	-1.9%	-4.3%	+2.3%	-27.9%
Ethereum	2,347	-0.4%	-2.6%	-12.8%	-1.0%	-40.6%
Solana	101.60	-0.7%	-2.3%	-16.7%	+16.8%	-47.6%
XRP	1.30	-0.0%	-0.5%	-17.2%	-9.3%	-50.0%

Crypto Fear & Greed Index

Computed from raw prices · as of 2026-10-23



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	54	Neutral	53	71

8. Big investors (13F)

Third-quarter 13F filings are due by Nov 16, so the first wave of filings from the investors we track will arrive in the coming weeks. Current holdings and quarter-over-quarter changes are on the [Big Investors page](#). 13F data are up to 45 days old and exclude short positions, bonds and most non-U.S. stocks.

9. Top news

What happened	Market reaction
Lula wins Brazil's runoff with 51.8%; Bolsonaro camp seeks annulment	Brazil ETF in Tokyo fell about 15%; Brazilian ADRs down 20-46% premarket

What happened	Market reaction
Houthi claim weekend strikes on Saudi oil sites and Riyadh airport; Saudi Arabia reports intercepts	Brent settled at \$116.72 Friday, then eased Monday
Qatari mediators travel to Tehran, coordinated with the U.S. (Reuters, citing an official)	Oil fell 1-2% in Asian and early European trade
Reports that SpaceX is seeking to lease up to 80,000 U.S. cell sites (Friday)	Crown Castle +9%, AT&T and T-Mobile about -8%
Moody's kept France at Aa3 with a negative outlook (late Friday)	French bonds rallied Monday
Fed week: hold widely expected, December hike in focus	Treasury yields eased slightly; dollar index 101.64

10. What strategists are saying

Who	View
King Lip, Baker Avenue Wealth Management	This week's earnings will show whether the tech selloff is a chance to buy or the start of a deeper pullback: "What we need is just another round of really strong earnings." (Reuters)
Nick Giorgi, Alpine Macro	Markets are growing wary of AI spending; he sees that discipline as healthy but expects some near-term pain (Reuters)
Lance Roberts, RIA Advisors	A hawkish tone from Chair Warsh could push the 10-year back above 5%, but credible AI returns from Microsoft and Alphabet could spark a short-covering rally
Mohamed El-Erian	Expects a hold this week and hikes from December, and argues fiscal restraint would be a better tool than rate increases (Benzinga)

11. Korea Corner

- The **KOSPI** fell 1.46% to 5,469.47 and the **KOSDAQ** about 3.3%; foreigners sold a net 695.5 billion won (Yonhap, JoongAng Daily). The won closed at 1,323.1 per dollar.
- **Samsung Electronics** fell 1.16% to 213,000 won and **SK Hynix** slipped 0.16% ahead of SK Hynix's Q3 results on Oct 28 and Samsung's final Q3 figures on Oct 29 (Korea time).
- Korea's advance Q3 GDP is due Tuesday; a Reuters poll's median is +0.7% q/q, after +0.6% in Q2.

This report summarizes confirmed data and published reports. It is not a recommendation to buy or sell any security.

Sources

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