

Microsoft Rises and Alphabet Slides After Hours as AI Spending Splits the Verdict

Data as of: 2026-10-28 16:45 ET (regular-session close; after-hours moves as noted)

Key takeaways

1. Microsoft rose about 4% after hours on 48% Azure growth, while Alphabet fell more than 6% as quarterly capex more than doubled.
2. The Fed held at 3.75%-4.00% in a 10-2 vote; the S&P 500 rose 0.3% and the 10-year yield climbed to 5.02%.
3. Next: Thursday's 8:30 AM GDP and PCE data, the ECB decision, then Amazon and Intel after the close.

Today's key news

The Fed did what everyone expected and left rates alone, so the real verdict of the day came after 4:00 PM, from two of the biggest AI spenders.

Microsoft rose about 4% in extended trading after Azure grew 48% and its backlog of contracted cloud revenue reached \$677 billion. Alphabet went the other way, falling more than 6%, after its quarterly capital spending more than doubled to \$51.4 billion and free cash flow turned negative.

During the session, stocks barely reacted to the Fed's 10-2 hold, but bonds did: the 10-year yield rose to 5.02%. What matters now is whether investors keep paying up for AI spending that shows a return and punish spending that does not, a test that moves to Amazon on Thursday.

+48%**Microsoft Azure revenue growth**

Stock about +4% after hours

\$51.4B**Alphabet Q3 capital spending**

From \$24.0B a year ago; stock down more than 6% after hours

10-2**Fed vote to hold at 3.75%-4.00%**

Cook and Hammack wanted a hike

What matters today

The Fed paused, and two officials wanted to keep going

The Federal Reserve kept its target range at 3.75%-4.00% after September's quarter-point hike. Governor Lisa Cook and Cleveland Fed President Beth Hammack dissented in favor of another increase, and the statement upgraded the economy's pace from "solid" to "strong" (Fed statement). It added that more information will guide the next step, and dropped September's language about a timelier return to 2% inflation (Fortune).

Chair Kevin Warsh declined to prejudge December. He also said the Fed will keep eight meetings a year but turn one of them in 2027 into a strategy session with no rate decision (Kiplinger). Stocks swung during the press conference and closed slightly higher. The bigger move was in bonds: the 2-year yield slipped to 4.71% while the 10-year rose to 5.02%, a steeper curve (Kiplinger, AP). CME FedWatch still priced an 86% chance of a December hike, up from 78% a day earlier (CoinDesk).

WMR data: going into today the 10-year yield was 4.99%, up about a full percentage point over a year; track it with the dollar and the VIX on </en/markets/pulse/>. Canada moved the other way on the same day: the Bank of Canada raised its rate by a quarter point to 2.50%.

Microsoft and Alphabet: same AI boom, opposite reactions

Microsoft's fiscal first-quarter revenue rose 19% to \$92.3 billion, and non-GAAP EPS of \$4.89 rose 18% (GAAP \$4.92 includes a small gain on its OpenAI stake). Azure grew 48%, Microsoft Cloud revenue reached \$63.9 billion, and commercial remaining performance obligation, contracted revenue not yet booked, jumped 73% to \$677 billion. Reuters said Azure revenue of \$33.17 billion beat the \$32.84 billion Visible Alpha estimate. Cash spent on property and equipment doubled to \$39.4 billion; including finance leases, capex was \$45.2 billion (Reuters).

Alphabet's revenue rose 25% to \$127.6 billion and Google Cloud revenue more than doubled to \$30.7 billion, above the \$29.6 billion analysts expected (Reuters). But GAAP EPS fell to \$2.12 from \$2.87, cut by \$0.55 from an \$8.66 billion loss on equity holdings, and capex of \$51.4 billion pushed free cash flow to minus \$9.1 billion, against LSEG's estimate of roughly break-even (Reuters). Alphabet also bought back no stock and instead sold \$12.4 billion of shares through its at-the-market program.

Why it matters: both companies are spending heavily, but Microsoft showed the contracted demand behind the spending while Alphabet showed the cash drain. **WMR data:** Alphabet entered the report down 5.8% in a week and 19.5% below its three-month high; Microsoft sat just 1.5% below its high. See </en/topics/microsoft/> and </en/earnings/>.

Earnings decided the session's biggest moves

Vertiv jumped 16.5% after organic orders more than doubled and it raised its outlook, and Micron gained 5.9% to \$983.23 as SK Hynix's record quarter kept the memory trade alive. Wendy's rose about 15% on Trian's \$7.35-a-share cash proposal. On the losing side, F5 and Enphase dropped sharply on weak outlooks, and Boston Scientific fell after cutting its fourth-quarter sales view, which Bloomberg tied to an August cyberattack.

Nvidia slipped 1.2% and Apple 0.9%, so the day's gains were not led by the largest names. **WMR data:** Micron ended Tuesday 11.9% lower over one month, so today's jump is a rebound inside a pullback; see </en/markets/semis/>.

After-hours earnings

Company	Results	Outlook	Stock
Microsoft (MSFT) FQ1	Revenue \$92.3B (+19%); non-GAAP EPS \$4.89 (GAAP \$4.92); Azure +48%	No numeric outlook in the release; guidance comes on the call	about +4% after hours
Alphabet (GOOGL) Q3	Revenue \$127.6B (+25%); GAAP EPS \$2.12; Cloud \$30.7B (+103%)	No full-year capex figure in the release	down more than 6% after hours (Reuters)
KLA (KLAC) FQ1	Revenue \$4.14B (about +29%); non-GAAP EPS \$1.22 (GAAP \$1.18)	FQ2 revenue \$4.7B $\pm$ \$0.2B; non-GAAP EPS \$1.44 $\pm$ \$0.11	After-hours and next-day reaction in the morning report
Fortinet (FTNT) Q3	Revenue \$2.08B (+20%); billings \$2.34B (+29%); non-GAAP EPS \$0.91 (GAAP \$0.86)	2026 revenue \$8.125B-8.215B; buyback authorization raised by \$1.2B	After-hours and next-day reaction in the morning report
eBay (EBAY) Q3	Revenue \$3.21B (+14%); GMV \$23.2B (+15%); non-GAAP EPS \$1.51 (GAAP \$1.11)	Q4 revenue \$3.19B-3.24B	After-hours and next-day reaction in the morning report
Chipotle (CMG) Q3	Revenue \$3.3B (+9.6%); comparable sales +2.1%; EPS \$0.27 (GAAP and adjusted)	2026 comparable sales growth in the low single digits	After-hours and next-day reaction in the morning report

Results come from the companies' releases and SEC filings. KLA beat the estimates Investing.com compiled for both the quarter and its December-quarter guidance. Chipotle's restaurant-level margin narrowed to 23.3% from 24.5% as labor costs rose. Also reporting after the bell: ServiceNow and Ford; full numbers in the morning report.

Last call vs. what happened

What we flagged this morning	What happened	Market reaction
Fed decision at 2:00 PM	Held at 3.75%-4.00% in a 10-2 vote, with two dissents for a hike	S&P 500 +0.3%; 10-year yield 5.02%
Whether the memory-chip rally would hold	Micron closed up 5.86%	Nvidia -1.17%, so the gain stayed concentrated in memory
Microsoft and Alphabet after the close	Microsoft beat on Azure; Alphabet beat on Cloud but burned cash	MSFT about +4%, GOOGL down more than 6% after hours
Bank of Canada	Raised its rate 25 bp to 2.50%	Signaled it may need to raise again

The morning's base case of a Fed hold, which futures priced at more than 90%, came true and is logged on the [track record](#).

What to watch

Time (ET)	Event
Thu 8:30 AM	Q3 GDP (advance), WSJ survey 3.1%; September PCE inflation, survey 3.7% headline and 3.1% core
Thu 8:30 AM	Weekly jobless claims, survey 200,000
Thu morning	ECB decision; 70 of 73 economists in a Reuters poll expected a hold at 2.50%
Thu before the open	Caterpillar, Mastercard, Merck, Eli Lilly
Thu after the close	Amazon (call 5:00 PM), Intel, Starbucks, Sandisk, Gilead, Reddit

If-then scenarios

- **If** Microsoft's call guidance lifts capital spending without hurting margins → check: Nvidia, Broadcom and Micron in Thursday trading
- **If** GDP and PCE both come in above the survey → check: the 2-year yield and December hike odds, now 86%
- **If** Amazon's AWS growth speeds up while capex rises → check: whether the market treats it like Microsoft or like Alphabet

Not a forecast — what to check depending on the outcome.

Our calls for Thursday (logged on the track record before the results): Q3 GDP growth at or above 2.5% annualized; the ECB holding its deposit rate at 2.50%; Microsoft closing Thursday above Wednesday's \$531.01.

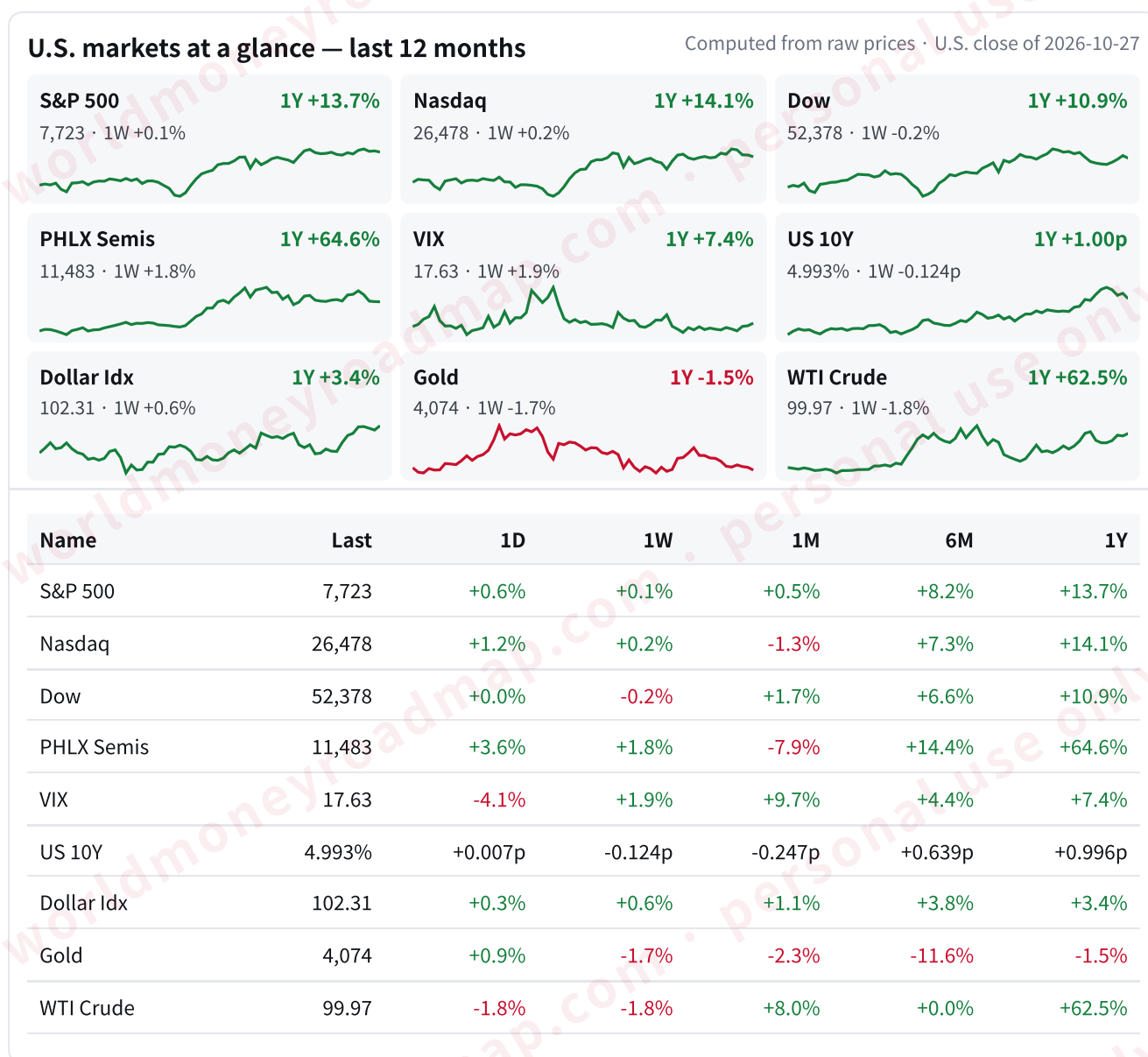
Market data

Close (10/28)

Index	Close	Day
S&P 500	7,743.98	+21.38 (+0.3%)
Dow Jones Industrial Average	52,475.10	+97.53 (+0.2%)
Nasdaq Composite	26,549.85	+72.04 (+0.3%)
Rates and commodities	Level	Change
10-year Treasury yield	5.02%	from 4.99%
2-year Treasury yield	4.71%	-3 bp

Rates and commodities	Level	Change
30-year Treasury yield	5.35%	+5 bp
Brent crude	\$111.64	+2%

Index closes and the 10-year yield from AP; 2-year and 30-year from Kiplinger. Breadth was even: NYSE advancers edged decliners 1.05 to 1, while the Nasdaq had 1.48 gainers for every loser (Reuters). The S&P 500 rose for a third day and is about 1% below its October record.



Big Tech and chips

Stock	Close (10/28)	Day
Micron (MU)	\$983.23	+5.86%
Alphabet (GOOGL)	\$324.89	+1.34%
Microsoft (MSFT)	\$531.01	-0.06%

Stock	Close (10/28)	Day
Apple (AAPL)	\$343.83	-0.94%
Nvidia (NVDA)	\$215.38	-1.17%

Closing prices from Stock Analysis. Apple held a product event today and introduced its first touchscreen MacBook Pro (9to5Mac).

Big Tech 1D performance

Computed from raw prices · U.S. close of 2026-10-27



Name	Close	1D	1W	1M	6M	1Y	YTD	vs 1Y high	Volume vs 20D avg
Nvidia (NVDA)	\$217.94	+0.9%	+0.7%	-3.2%	+2.5%	+14.1%	+17.1%	-8.9%	0.8x
Tesla (TSLA)	\$407.46	+4.0%	+9.0%	+9.5%	+8.4%	-9.9%	-9.4%	-16.8%	1.2x
Alphabet (GOOGL)	\$320.58	+1.2%	-5.8%	-6.8%	-8.2%	+19.4%	+2.6%	-20.3%	1.2x
Apple (AAPL)	\$347.10	+0.9%	+2.2%	+1.8%	+28.4%	+29.6%	+28.0%	-0.3%	1.0x
Microsoft (MSFT)	\$531.33	-0.2%	-0.1%	+2.9%	+24.3%	+0.8%	+10.6%	-2.2%	0.9x
Amazon (AMZN)	\$253.10	+1.6%	-3.6%	+1.4%	-2.5%	+11.5%	+9.7%	-10.9%	0.9x
Meta (META)	\$620.19	-1.6%	-10.7%	-17.5%	-7.5%	-17.1%	-5.8%	-20.2%	2.6x
Broadcom (AVGO)	\$342.33	+4.0%	+2.4%	-3.0%	-14.1%	-4.7%	-0.5%	-28.7%	1.2x
Palantir (PLTR)	\$198.73	-0.1%	+3.2%	+4.8%	+40.8%	+5.0%	+11.8%	-4.9%	0.9x
Nasdaq-100 ETF (QQQ)	\$721.25	+1.3%	+0.5%	-3.1%	+9.9%	+15.4%	+17.8%	-5.1%	0.8x

Nvidia 1Y +14.1%
217.94 · 1W +0.7%



Tesla 1Y -9.9%
407.46 · 1W +9.0%



Alphabet 1Y +19.4%
320.58 · 1W -5.8%



Apple 1Y +29.6%
347.10 · 1W +2.2%



Microsoft 1Y +0.8%
531.33 · 1W -0.1%



Amazon 1Y +11.5%
253.10 · 1W -3.6%



Meta 1Y -17.1%
620.19 · 1W -10.7%



Broadcom 1Y -4.7%
342.33 · 1W +2.4%



Palantir 1Y +5.0%
198.73 · 1W +3.2%



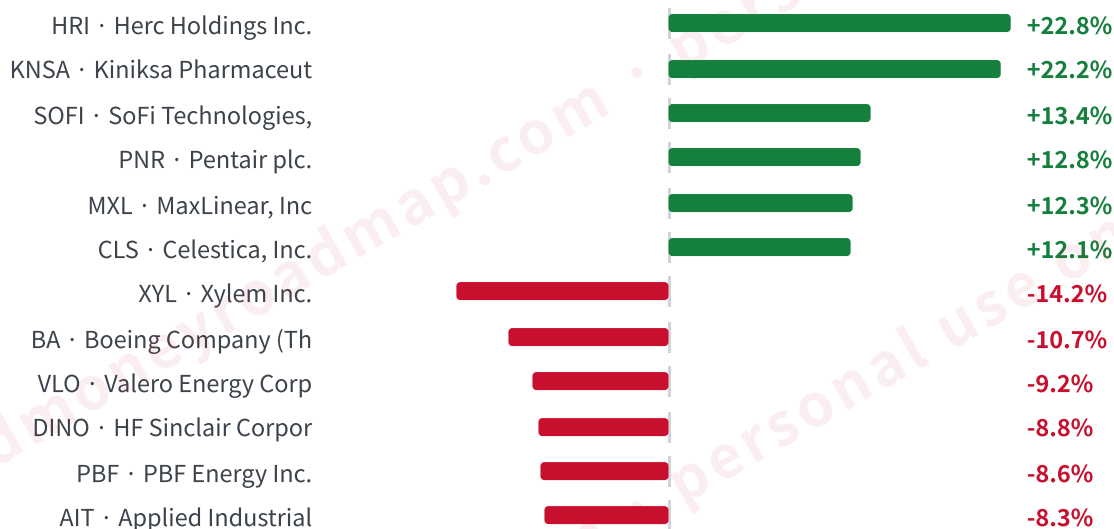
Biggest movers

Company	Move	Reason
Vertiv (VRT)	+16.48% (close)	Q3 sales +61%, organic orders more than doubled, outlook raised
Wendy's (WEN)	+14.6% (2:05 PM)	Truist proposed taking it private at \$7.35 a share in cash
GE HealthCare (GEHC)	+8.1% (2:05 PM)	Beat on profit and revenue; raised full-year guidance
Etsy (ETSY)	+5.9% (2:05 PM)	Profit well above forecasts; active buyers grew for the first time in two years
Micron (MU)	+5.86% (close)	Memory demand after SK Hynix's record quarter
Robinhood (HOOD)	-4.1% (2:05 PM)	Q3 profit and revenue missed; crypto revenue -55%
Boston Scientific (BSX)	-3.6% (2:05 PM)	Q4 sales outlook cut, tied to an August cyberattack
Enphase (ENPH)	-17.1% (3:01 PM)	Weak Q4 revenue guide of \$225M-255M
F5 (FFIV)	-19.8% (3:01 PM)	Guided fiscal 2027 revenue growth to 8-9%

Times show when the move was reported (AP at 2:05 PM, StockTitan at 3:01 PM); closing figures from Stock Analysis. GE Vernova also agreed to buy grid-equipment maker Trench Group for about \$9.0 billion and doubled its buyback authorization to \$20 billion (company 8-K).

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

Computed from raw prices · U.S. close of 2026-10-27



Name	1D	Close	Mkt cap	Volume vs 20D avg
HRI · Herc Holdings Inc.	+22.8%	\$156.06	\$5.2B	3.1x
KNSA · Kiniksa Pharmaceuticals Inte	+22.2%	\$89.20	\$7.0B	3.8x
SOFI · SoFi Technologies, Inc.	+13.4%	\$16.40	\$21.2B	3.2x
PNR · Pentair plc.	+12.8%	\$62.29	\$9.9B	2.5x
MXL · MaxLinear, Inc	+12.3%	\$74.67	\$6.8B	1.4x
CLS · Celestica, Inc.	+12.1%	\$276.54	\$34.9B	3.1x
XYL · Xylem Inc.	-14.2%	\$92.86	\$21.7B	4.6x
BA · Boeing Company (The)	-10.7%	\$168.18	\$132.9B	6.9x
VLO · Valero Energy Corporation	-9.2%	\$387.34	\$111.5B	1.7x
DINO · HF Sinclair Corporation	-8.8%	\$114.21	\$20.3B	1.3x
PBF · PBF Energy Inc.	-8.6%	\$73.63	\$8.7B	0.9x
AIT · Applied Industrial Technolog	-8.3%	\$297.58	\$10.9B	2.5x

Global markets

Market	Close	Day
STOXX 600	644.14	+0.07%
FTSE 100	10,694.50	+0.07%
KOSPI	6,012.44	+6.63%

In Europe, Stellantis gained more than 15% and Deutsche Bank about 4% on results, while Thyssenkrupp fell 17% and Adyen more than 13% after cutting its margin target (Reuters). Britain's

budget raised the bank surcharge to 6% from 3% for 15 months, less than feared; UK banks rose 1.1% while housebuilders fell more than 6.5%.

Crypto

Coin	Price (about 4:40 PM ET)	24h
Bitcoin	\$80,518.72	+0.10%
Ether	\$2,373.62	+1.3%
Solana	\$103.13	+2.00%
XRP	\$1.34	+1.30%

Most-traded altcoin	24h volume (USD)	24h
BNB	\$999M	+2.8%
Zcash (ZEC)	\$794M	+2.8%
Hyperliquid (HYPE)	\$762M	+3.4%
Pepe (PEPE)	\$634M	+14.7%
Ethena (ENA)	\$560M	+0.2%
Dogecoin (DOGE)	\$526M	+3.8%
NEAR Protocol (NEAR)	\$515M	+3.9%

Prices and volumes from CoinGecko, excluding stablecoins and wrapped tokens. Bitcoin edged up to about \$81,000 right after the Fed decision before giving it back (CoinDesk). Strategy shareholders approved moving its preferred shares to daily dividends with 99.3% of votes cast. More on </en/markets/crypto/>.

Major cryptocurrencies — last 12 months

Computed from raw prices · as of 2026-10-27

Bitcoin

1Y -29.3%

80,656 · 1W -2.8%



Ethereum

1Y -43.1%

2,344 · 1W -4.2%



Solana

1Y -49.2%

101.04 · 1W -5.1%



XRP

1Y -49.8%

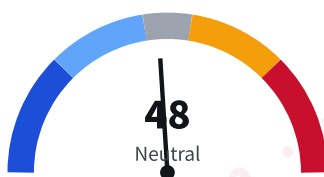
1.32 · 1W -0.9%



Name	Last	1D	7D	30D	182D	365D
Bitcoin	80,656	+0.8%	-2.8%	-4.5%	+5.6%	-29.3%
Ethereum	2,344	+1.0%	-4.2%	-12.8%	+2.4%	-43.1%
Solana	101.04	+0.3%	-5.1%	-17.2%	+20.2%	-49.2%
XRP	1.32	+1.2%	-0.9%	-12.9%	-4.2%	-49.8%

Crypto Fear & Greed Index

Computed from raw prices · as of 2026-10-27



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	48	Neutral	55	70

Company & Tech News Roundup

- **GE Vernova (GEV):** raised 2026 revenue guidance to \$46.5B-47.5B and settled all Vineyard Wind litigation alongside the Trench deal (company 8-K).
- **Wendy's (WEN):** Trian, which owns about 16.3%, says its offer has no financing condition; a special committee of independent directors would review it (SEC filing).
- **Apple (AAPL):** unveiled a redesigned MacBook Pro with a touchscreen, its biggest Mac design change in years (9to5Mac; CNBC).
- **Anthropic:** its S-1 still shows no price range; the company plans to list on Nasdaq as ANT (company).
- **Microsoft (MSFT):** commercial bookings fell 12% and Windows OEM and devices revenue fell 22% in the quarter (company metrics).
- **Alphabet (GOOGL):** the Gemini app has 1 billion users, and YouTube Music and Premium have more than 150 million subscribers including trials (company release).

What strategists said

Who	View
Ryan Detrick, Carson Group	The hold surprised no one; the market's focus is whether AI spending continues (neutral)
Brandon Zureick, Johnson Investment Counsel	Futures traders see a December hike as likely (cautious on rates)

Comments as reported by Reuters and Kiplinger.

Calendar

When (ET)	Event	Survey
Thu 8:30 AM	Q3 GDP, advance	3.1% (Q2: 2.2%)
Thu 8:30 AM	September PCE prices, year over year	3.7% (core 3.1%)
Thu 8:30 AM	Initial jobless claims	200,000
Thu morning	ECB decision	Hold at 2.50%
Thu after close	Amazon, Intel, Starbucks, Sandisk, Gilead, Reddit	Amazon call at 5:00 PM
Fri	Bank of Japan decision	Hold expected
Fri 8:30 AM	Q3 employment cost index	0.8%
Fri 9:45 AM	Chicago PMI (Oct)	56.0
Mon 11/2	Apple fiscal Q4 results	After the close
Tue 11/3	U.S. midterm elections	Election Day

Economic surveys from the WSJ via Dow Jones Newswires; ECB expectation from a Reuters poll.

Korea Corner

Seoul's KOSPI jumped 6.63% to 6,012.44 on Wednesday, with SK Hynix up 10.89% and Samsung Electronics up 9.01%, and the won ended at 1,337.7 per dollar (Korea JoongAng Daily). Samsung Electronics' results are next, a check on whether memory pricing can carry the U.S. chip names further.

Charts are computed directly from raw prices; each shows its own data date. In this evening edition the charts use Tuesday's (Oct 27) regular-session close, so they do not include today's moves quoted in the text. On the web, tap a chart for the detailed table.

After-hours moves are early readings shortly after the releases (Reuters, Yahoo Finance) and can change through the evening and Thursday's open. Microsoft and Alphabet consensus figures for total EPS and revenue were not confirmed by two major outlets by publication, so only the segment estimates Reuters cited are shown. Reddit buzz and the unusual-volume screen are on </en/markets/reddit/> and </en/markets/local/>.

This report is for information only and is not investment advice.

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