

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: January 26, 2026

As the global markets move into the final stretch of January, traders are bracing for a high-velocity week characterized by a "triple threat" of catalysts: a highly anticipated **Federal Reserve** decision, a wave of **Big Tech earnings**, and continued volatility in the **precious metals** markets.

Central Banks: The Fed at a Crossroads

The **Federal Open Market Committee (FOMC)** will conclude its first two-day meeting of 2026 on **Wednesday, January 28**.

- **The Consensus:** Markets widely expect the Fed to keep the federal funds rate steady at **3.5%–3.75%**. After a 25-basis-point cut in December, policymakers are signaling a "wait-and-see" approach as inflation remains sticky around 2.8%.
- **The Powell Factor:** Traders will be parsing Chair Jerome Powell's press conference for hints regarding the impact of the newly proposed "One Big Beautiful Bill Act" fiscal stimulus. Any hawkish tilt could push the **10-year Treasury yield** back toward the **4.5%** resistance level.



- **Global Shifts:** Elsewhere, the **Bank of Canada** and the **Sveriges Riksbank** (Sweden) are also expected to announce rate decisions, with Canada potentially delivering a surprise 25-bp cut to support a cooling housing market.

Big Tech Earnings: The AI Reality Check

- This week marks the busiest stretch of the Q4 2025 earnings season, specifically for the "Magnificent Seven."

Date	Company	Key Watchpoint
Jan 28	Microsoft (MSFT)	Growth in Azure AI and the monetization of Copilot.
Jan 28	Meta (META)	Ad revenue resilience and "Reality Labs" burn rate.
Jan 28	Tesla (TSLA)	2026 delivery guidance and FSD (Full Self-Driving) adoption.
Jan 29	Apple (AAPL)	Initial impact of the Google-Gemini integration for Siri.

The Stakes: Since the beginning of the year, the S&P 500's gains have been heavily concentrated in these four names. A collective "beat and raise" could propel the index past **7,000**, while any weakness in AI guidance could trigger a rotation into small-caps (Russell 2000).

Commodities: Gold and Silver's Historic Rally

Precious metals have decoupled from traditional yield relationships this week, driven by geopolitical headlines and central bank diversifying.

- **Gold:** Currently trading near an all-time high of **\$4,930/oz**. Bulls are eying the psychological **\$5,000** mark as safe-haven demand spikes amid tensions regarding North Atlantic trade tariffs.
- **Silver:** Smashed records last week to hit **\$101/oz**. Beyond its role as a hedge, silver is benefiting from massive industrial demand in the EV and solar sectors as the 2026 "Green Transition" subsidies begin to roll out.

Economic Data Calendar: The Pulse of the Consumer

Traders should keep a close eye on these high-impact releases:

- **Monday:** US Durable Goods Orders (Expected: +0.5%).
- **Tuesday:** US Conference Board Consumer Confidence (Expected: 104.5).
- **Wednesday:** **Fed Rate Decision** and Australian CPI (Expected: 3.6% YoY).
- **Friday:** US Producer Price Index (PPI) and Tokyo Core CPI.



Trading Strategy: The "Bifurcated" Market

The current environment favours a **barbell strategy**. On one side, hold exposure to the "AI Winners" reporting this week; on the other, maintain a position in **hard assets** (Gold/Silver) to hedge against a potential hawkish surprise from the Fed or an escalation in trade rhetoric.

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