US Macro Daily (Beta Mode)

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US Daily Economics

Asset	Prior Close	Change
S&P 500	6737.49	▼ -1.66%
FTSE 100	9807.68	▼ -1.05%
UK Natural Gas	4.60	▲ +1.48%
2 Year Gilt	N/A	− N/A%
10 Year Gilt	N/A	− N/A%
GBP/USD	1.3161	▲ +0.25%
GBP/EUR	1.1308	▼ -0.14%
EUR/GBP	0.8840	▲ +0.12%
Brent Oil	63.28	▲ +0.91%
Gold	4188.20	▼ -0.39%
Bitcoin	N/A	− N/A%

Prior Economic Events

Data	Prior	Cons	Actual
Halifax House Price Index Month-over-Month	-0.30	0.10	**0.60**
Halifax House Price Index Year-over-Year	1.30	1.45	**1.90**

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Today's Economic Events

Data	Prior	Cons	Time
No events available			

- **Halifax house prices rose 0.6% m/m, surpassing expectations and signaling UK housing market recovery.**
- **BoE interviews emphasized data dependence, maintaining neutral stance on rates.**
- **Global trade tensions ease as US-China truce advances, supporting UK export prospects.**

Yesterday's Recap

UK house prices surged 0.6% month-on-month per Halifax, beating consensus of 0.1% and previous -0.3%, with year-on-year at 1.9% versus expected 1.45%.
Markets traded calmly, with FTSE 100 holding steady amid limited volatility.
BoE speeches from Elderson and de Guindos highlighted data dependence without policy shifts, reinforcing stability.

The Day Ahead

Investors eye potential UK data releases, though no major events scheduled for immediate impact.
BoE officials may reiterate cautious views on inflation convergence in speeches.
Global trade updates could influence sentiment if US-China talks progress.

Other Economic Notes

UK housing supply constraints persist, exacerbating price pressures amid demand from buyers and renters. *(cont...)*

Chart 1

Chart 2

Chart 3

Chart 4

Other Economic Notes (continued)

Brexit-related trade barriers continue to hinder export growth in manufacturing sectors.
Energy costs remain elevated, weighing on consumer spending despite renewables push.

Global Macro News

European economies show stagnation despite past convergence on the US, with internal market fragmentation equivalent to 44% tariffs hindering growth.
China's EV market implodes under state intervention, with inflated sales and losses threatening global supply chains.
Japan's offshore wind ambitions falter, risking energy security as Asia races ahead in renewables.
US-China cold war intensifies over technology and tariffs, pressuring global trade and UK imports.
These tensions elevate geopolitical risks, potentially slowing UK economic recovery through higher costs and uncertainty.

BoE Watch

In a neutral phase, BoE maintains steady base rates amid data-dependent approach, with inflation converging toward 2%.
Recent house price strength supports measured cuts if wage and services data align.
MPC voting patterns suggest caution, pricing fewer 2025 reductions to monitor global uncertainties.
Elderson's interview reinforces this stance, avoiding shifts despite euro appreciation risks.