

MARKET TREND

INDEX	30/03/2026	YTD	COMMO	30/03/2026	1Y	CURRENCIES	30/03/2026	YTD	BONDS	30/03/2026	1Y	▲
S&P500	6,368.85	-6.96%	GOLD	4,534.02	128.95%	EUR-USD	1.149	-2.13%	US 10 Y	4.43%		15
NASDAQ	20,948.36	-9.87%	SILVER	70.87	196.40%	GBP-USD	1.323	-1.73%	UK 10 Y	5.04%		30
DOW JONES	45,166.64	-6.03%	WTI	101.81	56.56%	USD-CAD	1.390	1.57%	AUS 10 Y	5.10%		64
EURO STOXX	5,509.17	-5.83%	NAT. GAS	2.94	-26.12%	CHF-USD	1.251	-0.94%	SW 10 Y	0.43%		-19
HANG SENG	24,750.79	-3.43%	CORN	462.75	-13.03%	USD-CNY	6.909	-1.23%	NOR 10 Y	4.37%		34
TA-125	4,021.34	10.02%	COFFEE	301.05	-13.03%	USD-ILS	3.164	-0.36%	ISR 10 Y	4.16%		-40

Overview:

Over the past week, global equity markets declined across all major regions as rising geopolitical tensions in the Middle East pushed oil prices higher, reigniting inflation concerns and reducing expectations for near-term interest rate cuts. In the U.S., major indices extended their losses with the Dow entering correction territory and technology stocks under pressure; in Europe, markets showed slight resilience but remained volatile amid inflation and growth concerns; in Asia, equities broadly declined as higher energy costs weighed on sentiment and economic outlook; and in Israel, the TA-125 fell sharply by around 4.8%, reflecting regional risk aversion and geopolitical uncertainty.

WORLDWIDE TOP NEWS

- The Iran-Israel conflict escalated further with strikes on Tehran and drone attacks, raising fears of a broader regional war
- Oil prices surged above \$115 per barrel amid concerns over supply disruptions linked to the Middle East conflict
- G7 and EU leaders held urgent discussions on energy security, inflation risks, and global economic stability.
- Fighting intensified in Ukraine as Russia launched a new spring offensive while peace talks remained stalled
- Denmark's election weakened Prime Minister Mette Frederiksen's position, triggering coalition negotiations
- Argentina marked 50 years since the 1976 military coup with large nationwide remembrance demonstrations

REAL ESTATE

- U.S. housing demand stayed under pressure as mortgage rates rose to their highest level since October, worsening affordability and slowing activity
- U.S. residential real estate faced legal pressure as major brokerages were required to face lawsuits over alleged commission price-fixing
- In commercial real estate, CoStar faced antitrust claims from a rival platform, highlighting increased regulatory scrutiny in the sector
- New Zealand's property market remained weak, with oversupply, limited buyers, and stalled developments slowing recovery
- In Japan, KKR continued expanding its real estate investments, signaling ongoing institutional interest despite rising costs
- Global real estate sentiment remained cautious as higher energy prices and tighter financial conditions weighed on both residential and commercial markets

BANKING & FINANCE

- U.S. regulators unveiled a softer rewrite of major bank capital rules, expected to reduce required capital for large banks and support lending, dividends, and buybacks
- The European Central Bank announced faster approvals for banks' internal risk model changes to reduce delays and administrative burdens
- The European Union moved to ease the impact of Basel trading-book rules through temporary measures supporting bank capital flexibility
- Bank of America agreed to pay \$72.5 million to settle a lawsuit linked to Jeffrey Epstein accusers
- The World Bank signaled financial support for countries impacted by the Middle East conflict, especially those facing rising energy costs
- Israel's Finance Ministry maintained a positive 2026 growth outlook but warned it depends on the duration of regional conflict
- Standard Bank outlined expansion plans across Africa focused on trade and infrastructure financing
- Global financial markets remained fragile as higher oil prices pushed bond yields up and increased inflation concerns

TECHNOLOGY

- Arm unveiled a new AI data-center chip, marking a major strategic push into infrastructure for autonomous AI systems
- Nvidia remained central to the AI market, but its valuation declined amid market stress and concerns over sustainability of AI spending
- EU antitrust authorities increased scrutiny on big tech, meeting leaders from Google, Meta, OpenAI, and Amazon to address competition in AI
- The European Commission reported a cyberattack on its web platform, with some data extracted from cloud systems
- Broadcom warned that TSMC capacity constraints are becoming a key bottleneck in the global semiconductor supply chain
- Rising AI-driven electricity demand boosted interest in long-duration energy storage solutions for data centers
- Investment in AI infrastructure remained very strong despite growing concerns over long-term returns
- The AI sector expanded into space technology, with Starcloud reaching a \$1.1 billion valuation focused on satellite-based computing

Key Economic Indicators:

- In the U.S., consumer sentiment fell to a three-month low as higher oil prices and market volatility weakened confidence and delayed expectations for rate cuts
- In Europe, inflation picked up notably in Germany, with energy costs driving expectations of higher eurozone inflation
- Eurozone consumer confidence declined as the energy shock raised concerns about prolonged high interest rates
- In Asia, India's private-sector growth slowed to a three-year low due to rising input costs and weaker demand
- The Asian outlook weakened as rising energy prices increased inflation risks across developing economies
- In Israel, inflation edged up to around 2.0%, supporting expectations that interest rates will remain on hold
- Israel approved its 2026 budget with a deficit target near 5% of GDP, reflecting increased fiscal pressure from the war
- Israel's 2026 GDP growth is expected between 3.3% and 3.8%, depending on the duration of the conflict

Outlook:

The upcoming week will be driven primarily by geopolitical developments and energy prices, with markets closely watching whether tensions in the Middle East escalate further, as this could sustain high oil prices and inflation pressures. Key economic data will also be in focus, including U.S. employment figures, eurozone inflation, and Asian trade data, all of which could influence central bank expectations. Overall, the outlook remains cautious, with continued volatility expected in equities, upward pressure on inflation, and relative support for energy and defensive assets.

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