GS TMT TODAY 9.10.26 GS TMT 今日 9.10.26

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Good Morning. Futures mixed in the pre (Nasd -40bps vs. S&P flat) ahead of PPI this morning and CPI tomorrow with overnight news centered on more US/Iran headlines (WSJ reported that advisers have told President Trump that the conflict with Iran could last through his entire presidency/senior Iranian officials said they are prepared to escalate/the Houthis seized a port city). Higher yields (have a $22bn 30 year auction today) and the recent outperformance of the AI trade (Jensen speaking at our Tech conference at 11:50am est/ORCL eps post-close) are also top of mind.

早上好。盘前期货涨跌互现（Nasd 下跌 40bps，S&P 持平），今日上午将公布 PPI，明日公布 CPI；隔夜新闻主要聚焦更多有关美国/伊朗的消息（WSJ 报道称，顾问已告知特朗普总统，与伊朗的冲突可能持续其整个总统任期/伊朗高级官员表示已准备升级局势/胡塞武装占领了一座港口城市）。收益率走高（今日将进行$22bn 的 30 年期国债拍卖）以及近期 AI 交易的出色表现（Jensen 将于美东时间上午 11:50 在我们的科技会议上发言/ORCL 将在收盘后公布 eps）同样是市场关注重点。

In TMT, overnight news was fairly quiet, with META +1% extending its Muse-driven gains on a JPM upgrade to overweight (stock +6.5% yesterday), and early price action pointing towards Internet (META, GOOGL, AMZN all green) over Semis/AI-infra (Semis -1%, with higher beta pockets of the group -2 to -4%).

在 TMT 领域，隔夜消息相对平静。META 在 Muse 推动的涨势基础上进一步上涨 1%，原因是 JPM 将其评级上调至增持（该股昨日上涨 6.5%）；早盘价格走势显示，市场更偏好互联网板块（META、GOOGL、AMZN 均上涨），而非半导体/AI 基础设施板块（半导体下跌 1%，其中高 beta 板块下跌 2 至 4%）。

Today is Day 3 of our Conference. Big focus on Jensen at 11:50am ET, UBER at 1:10PM, and SPCX at 3:25PM (full agenda below).

今天是我们会议的第 3 天。重点关注美东时间上午 11:50 的 Jensen、下午 1:10 的 UBER，以及下午 3:25 的 SPCX（完整议程如下）。

Pre Market Gainers		
Ticker	% move	Volume
SNPS	1.7%	12,984
META	1.4%	388,365
RPD	1.3%	672
NOW	1.3%	105,664
RBRK	1.2%	3,674
AAPL	1.1%	564,615
Z	1.1%	2,385
MDB	1.0%	598
FOUR	0.9%	5,158
KVYO	0.8%	1,882

Pre Market Decliners		
Ticker	% move	Volume
TENB	-7.7%	13,097
CRWV	-3.9%	367,089
NBIS	-3.0%	170,563
SMTC	-2.6%	5,199
OPEN	-2.3%	751,477
KLAC	-2.0%	26,961
WDC	-2.0%	30,115
LRCX	-1.9%	17,750
MU	-1.9%	364,704
MRVL	-1.9%	180,151

Macro Monitor				
Futures	% move		Asia	% move
Nasdaq	-0.41%		Shanghai	-0.43%
S&P	-0.01%		Hong Kong	-1.27%
Russell	0.00%		HK Tech	-2.04%
Bonds	Yield	bp move	Japan	0.20%
US 10yr	4.87%	0.024	Korea	-0.25%
Cmdty / Crncy		% move	Europe	% move
Bitcoin		-0.6%	Europe 600	-0.04%
Oil		1.7%	Euro Tech	-0.67%
Gold		-0.5%		
Dollar		0.1%		

GS COMMUNACOPIA + TECHNOLOGY CONFERENCE:

Conference Website (+ Agenda and Webcast links):
https://marquee.gs.com/content/themes/communacopia-technology-conference.html

会议网站（包括议程和网络直播链接）：https://marquee.gs.com/content/themes/communacopia-technology-conference.html

Day 3 Agenda (times in EST)

第 3 天议程（时间为 EST）

11:10 AM: GS, Q, OMC, NAVN, PTRN, FOUR

上午 11:10：GS、Q、OMC、NAVN、PTRN、FOUR

11:50 AM: **NVDA**

12:30 PM: TMUS, DDOG, LRCX, U, HPE, RBRK, FLYW

下午 12:30：TMUS、DDOG、LRCX、U、HPE、RBRK、FLYW

1:10 PM: UBER, STX, MDB, INTU, SMCI, ADT, CAP.FP

下午 1:10：UBER、STX、MDB、INTU、SMCI、ADT、CAP.FP

1:50 PM: Yahoo, CRDO, ZG, 6098 JT, ULS, S

下午 1:50：Yahoo、CRDO、ZG、6098 JT、ULS、S

3:25 PM: **SPCX**

4:45 PM: CRWD, WTC.AU, RNG, LYFT, NXST, EPAM, PAR

下午 4:45：CRWD、WTC.AU、RNG、LYFT、NXST、EPAM、PAR

5:25 PM: SHOP, FISV, SWKS, AUR, PENG, IBTA, VIA

下午 5:25：SHOP、FISV、SWKS、AUR、PENG、IBTA、VIA

6:05 PM: Data Centers & Power (Brian Singer), 6920 JT, BILL, SAIL, GRND, FIGR

下午 6:05：数据中心与电力（Brian Singer），6920 JT、BILL、SAIL、GRND、FIGR

6:45 PM: PANW, LIF, DLO, PRCH, ZIP, PAY

下午 6:45：PANW、LIF、DLO、PRCH、ZIP、PAY

7:25 PM: MA, MBGL, PCOR, LUMN, WBTN, CRCT

下午 7:25：MA、MBGL、PCOR、LUMN、WB CRCT

