The US’s new tariffs have shaken up the global economy – but the AI boom is helping to hold things together

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“Scepticism often spikes at the top — but it also tends to keep investors from participating in ongoing structural shifts.”

“Inflation is easing, equities remain resilient despite short-term volatility, and rate cuts are now firmly on the table.”

We’re seeing a subtle shift in tone from key Fed officials, yet Fed Chair Jerome Powell may be gone soon.

Stocks have rebounded since Trump’s tariff backpaddling and concessions. But there are still signs of strain in the bond market.

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