

Weekend desk · Sat 15 + Sun 16 · last cash is Friday · NFA

Session box

Item	Print	Note
S&P; / Nasdaq (Fri)	7,785.76 / 26,729	-0.17% / -0.28%. Still the last cash.
Tesla / SpaceX (Fri)	\$342.27 / \$140.00	+0.68% / -0.91%. \$135 held.
WTI / 10y (Fri)	~\$82.30 / ~4.69%	Weekend oil story got louder, not quieter.
Retail / UMich (Fri)	-0.6% / 51.0	Shoppers stalled. Sentiment slipped.

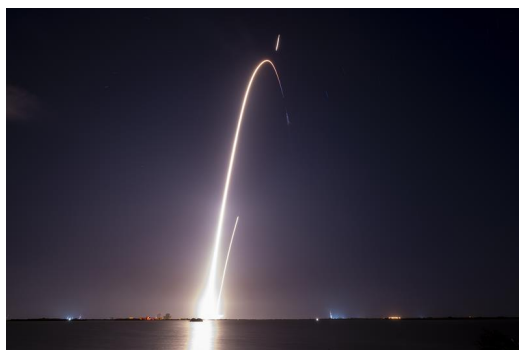
Weekend objects

When	Object	One line
Sat	Harvard 13F	\$2.2B SpaceX. 50% of 13F sleeve, not the \$57B endowment.
Sat	Nvidia 13F	SpaceX entered as xAI conversion. Not a cash buy.
Sat	SB Energy	\$3B / \$100B credit talk. Reuters unverified.
Sat	Hormuz	Still shut. Third ADNOC hit recap.
Sun	Dual Falcon	Florida + California. 38 minutes. Globalstar deployed.
Sun	Goldman \$500B	Still shopping. Nvidia cap 25%.
Sun	SPR	Below 300 million barrels. First time since 1980s recap.
Sun	Micron MS card	~\$400B two-year operating income sketch.

Watchlist one-liners

Name	Line
Nvidia	Financing + power rumor. Flat Friday.
Apple / Amazon / Meta	Quiet.
Microsoft	Ohio campus sits behind SB Energy talk.
Alphabet	SpaceX 13F still the card.
Tesla	Invesco add. Still 90-100 unsupervised cars.
SpaceX	Factory flew. Do not chase the filing.
Palantir	Burry clip. No product number.
Micron / Sandisk	Memory still the Friday industrial lead.
AppLovin	Quiet.

Day call: oil tax, SpaceX hold-the-line, 13F is not a Monday order. Falsifier: crude quiet and SpaceX loses \$135 on size. NFA.



Sunday factory. Monday still has to open.