

Monday night desk · after the cash close · NFA

Session box

Item	Print	Note
S&P; / Nasdaq / Dow	7749 / 26642 / 53483	-0.47 / -0.33 / -0.46. Semis +1.6%.
SpaceX	\$146.23 (+4.45%)	High \$149.80. Vol 117M. \$135 held.
Tesla	\$339.30 (-0.87%)	Quiet.
Micron / Sandisk	\$1,011.75 / \$1,786.85	+4.1% / +8.9%.
MSFT / META	\$480.35 / \$568.97	-3.0% / -3.5%. Duration.
Brent / 30y	~\$91 / 5.29%	Oil tax + 2007-high thirties.

Call: oil taxed the index, not the factory or the memory book. \$210 / \$75 both lost. Watch \$150 / \$140 SpaceX and \$1,000 Micron Tuesday. NFA.