

Thu 27 Aug 2026 · PREMARKET ~07:35 ET · Nvidia print done · Marvell AMC · Warsh Friday · pay the print

Kit bid, not a Mag 7 bid. NQ +1.02%, ES +0.46%, YM -0.05%. NVDA \$222.25 +6.00% vs \$209.66 cash. MU +4.2%, SNDK +4.7%, CRM +10%, CRWD +9%, OKTA +18%. AAPL/MSFT/GOOGL/AMZN/META red. SPCX \$140.40 +0.55%. TSLA flat. Warsh still Friday.

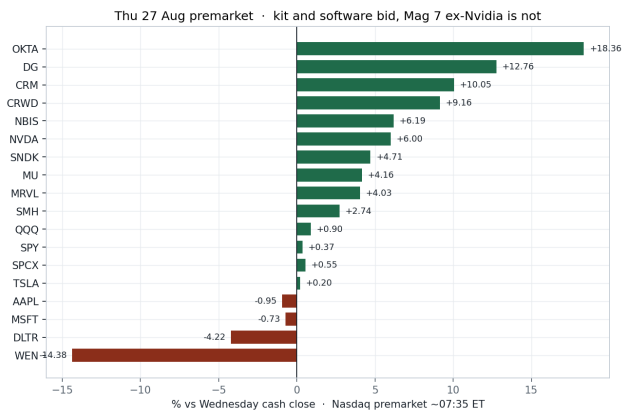
	Last	Today
NQ / ES / YM	+1.02% / +0.46% / -0.05%	Futures. Cash still Wednesday.
Nvidia	\$222.25 +6.00%	Q2 \$96.2B. Q3 \$108B. Call: ~70% FY28, supply-constrained. AWS +2m GPUs 2027-28.
Micron / Sandisk	\$977 / \$1,570	+4.2% / +4.7%. Dummy worked.
Marvell	\$255 +4.0%	AMC. Guide \$2.70B +/-5%. Exam = Q3 vs ~\$3.03B.
CRM / CRWD / OKTA	+10% / +9% / +18%	Software bid. CRWD is the clean raise. OKTA is the chase.
SpaceX / Tesla	\$140.40 / \$346.53	Digestion. Not the event.
10y / 30y / WTI	4.664% / 5.186% / ~\$82.45	Not the story. Hormuz diplomacy.

Watchlist one-liners

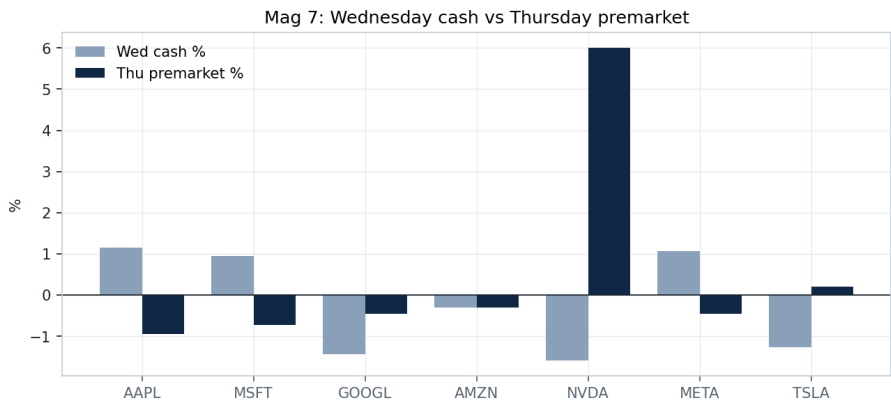
Name	PM	Line
Nvidia	+6.00%	Hold \$218-\$222 = cash event. \$210 = squeeze.
Apple	-0.95%	Duration. Not kit.
Microsoft	-0.73%	Same.
Alphabet	-0.45%	Marvell-Google tonight.
Amazon	-0.30%	AWS is the buyer. Stock is not the expression.
Meta	-0.45%	Settlement already faded.
Tesla	+0.20%	Skip.
SpaceX	+0.55%	\$135-\$140 box. Unlock ~9 Sep.
Palantir	-0.48%	Wed bid, no product.
Micron	+4.16%	Dummy yes.
Sandisk	+4.71%	Dummy yes.
AppLovin	+0.73%	Quiet.

Call: pay the print, do not spend Warsh. Fade Okta. Watch Marvell Q3. NFA.

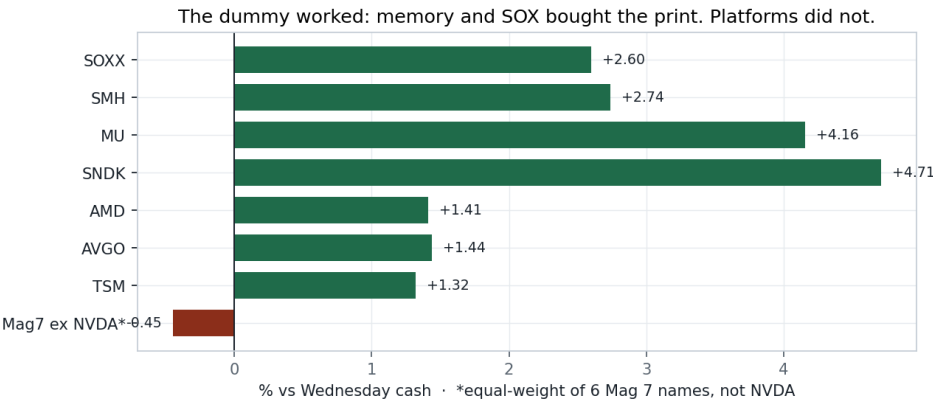
- 09:30 NVDA \$218-\$222 vs \$210.
- Marvell AMC: Q3 vs ~\$3.03B.
- Claims 08:30. DG +13% / DLTR -4% tape only until 8-Ks.
- Hugging Face \$12.9B = rumor until they file.
- Warsh Friday 10:00 ET.



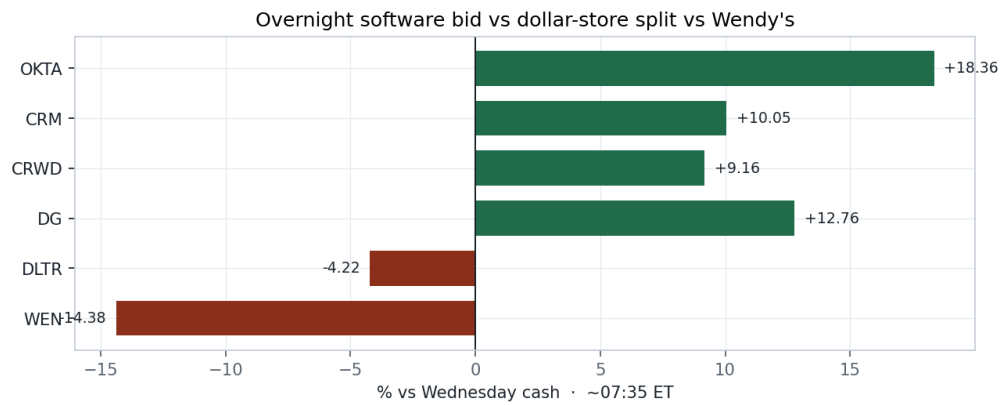
Premarket sketch ~07:35 ET. Illustrative.



Only Nvidia flipped from unique red into the print to unique green.



Memory and SOX vs Mag 7 except Nvidia. The dummy worked.



Software bid vs dollar-store split vs Wendy's. Three mechanisms, same clock.

Nvidia official: Q2 \$96.221B, DC \$89.0B, Q3 \$108B +/-2%, GM guide 74.0% +/-50bp. Call color: ~70% FY28, supply-constrained vs customer doubling. AWS PR: 2 million additional GPUs in 2027-2028. Hugging Face \$12.9B = The Information, unverified.

Not financial advice. Premarket. Cash has not traded Thursday. X credits empty. Audio on hold.