

Wed 2 Sep 2026 · CASH CLOSE · DELL +16% · NVDA reclaimed \$220 · PANW -9% after a beat · AVGO 5:00 ET

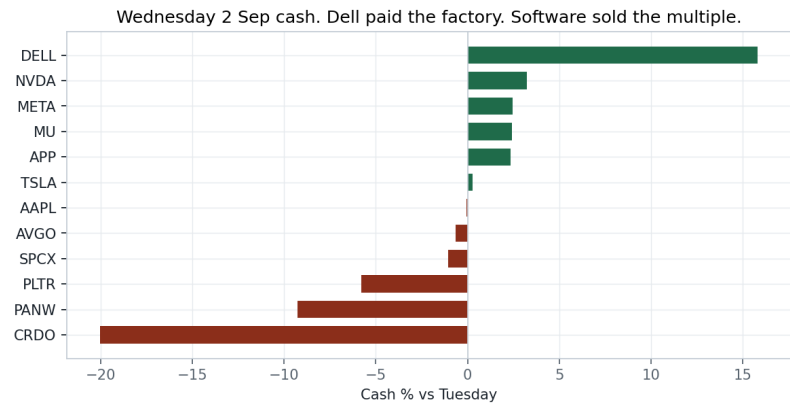
S&P 7,666.60 +0.46%. Nasdaq 26,217.83 +0.45%. SOX +0.45%. DELL \$492.20 +15.81% (low \$432). NVDA \$224.41 +3.21% (high \$227.95, vol 153m). PANW \$328 -9.3%. PLTR \$169 -5.8%. CRDO \$165 -20%. TSLA \$357 +0.3% (low \$349.92). SPCX \$141 -1.1% (low \$138.17). WTI settle \$91.01 (H \$92.29 / L \$88.97). 10y 4.80%. ADP +38k vs ~48k. AVGO AMC, AI semi vs \$16B.

	Close	Day
S&P / Nasdaq / Dow	7,667 / 26,218 / 53,062	+0.46 / +0.45 / +0.56
WTI / 10y / 30y / ADP	\$91.01 / 4.80% / 5.27% / +38k	tagged \$92, held \$89 · Jobs Fri
Dell	\$492.20	+15.81% · \$95B backlog · year \$192B
Nvidia	\$224.41	+3.21% · through Mon \$220.78 · vol 153m
Palo Alto / Palantir	\$328 / \$169	-9.3 / -5.8 · beat-and-sell
Tesla / SpaceX	\$357 / \$141	held \$350s (low \$349.92) / leaked to \$138
Broadcom	\$367.24	-0.66% · call 5:00 · AI \$16B
Name	Close	One line
Nvidia	\$224.41 +3.21%	Reclaimed \$220. Vol 153m.
Apple	\$324.96 -0.05%	Ternus day two sat. Event 9 Sep.
Microsoft	\$496.82 -0.84%	Duration leaked a little.
Alphabet	\$337.12 +0.63%	Quiet. No unique industrial wire.
Amazon	\$254.98 +0.02%	Sat. Oil leak did not extend.
Meta	\$592.85 +2.47%	Bid with kit.
Tesla	\$357.01 +0.26%	Low \$349.92. Cybercab Thu.
SpaceX	\$140.71 -1.07%	Low \$138.17. Unlock 9 Sep ~319m.
Palantir	\$169.46 -5.81%	Software duration. No HIT.
Micron	\$956.08 +2.43%	Memory followed Dell.
Sandisk	\$1,553.40 +1.08%	Same dummy as Micron.
AppLovin	\$319.05 +2.34%	Bid with kit. No unique wire.

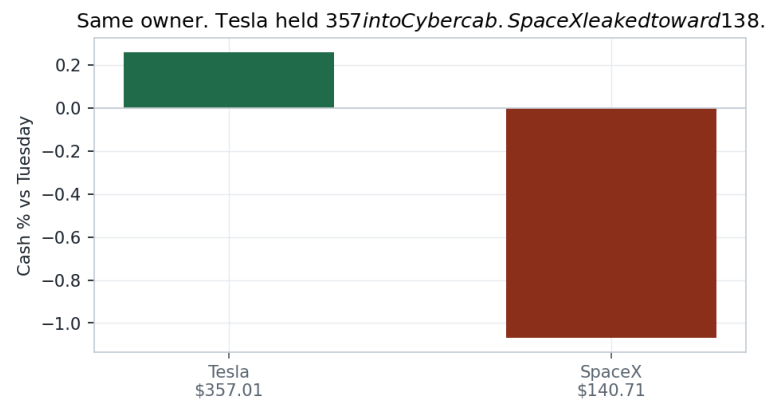
Call: pay Dell's backlog. Cramer blessed it, they chopped it, cash still paid it. Fade PANW/CRDO multiple. Do not pre-trade AVGO \$16B. Tesla \$350s into Thursday 5:45 ET. SpaceX \$138-\$143 into 9 Sep. Oil still \$91. Jobs Friday. NFA.

- AVGO tonight: AI semi vs \$16B.
- DELL \$450s hold vs \$432 lose.
- NVDA \$220 hold vs \$217 hole.
- TSLA \$350s through Cybercab Thu.
- SPCX \$138-\$143 into 9 Sep ~319m. Lose \$135 = smash talk.

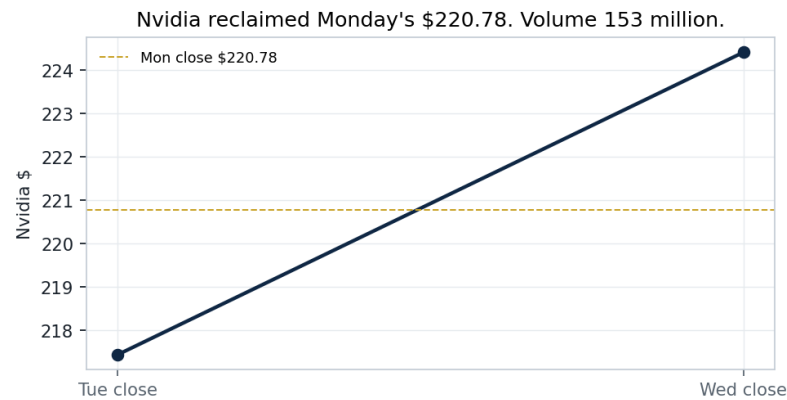
- Jobs Friday ~58k. 10y vs 4.82%.



Dell versus Palo Alto. Factory versus multiple.



Tesla held. SpaceX leaked.



Nvidia through \$220.

Not financial advice. Cash close. Broadcom still AMC. Audio on hold.