

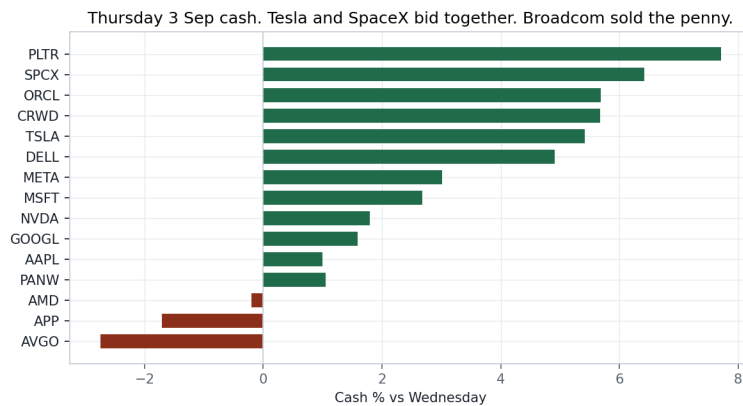
Thu 3 Sep 2026 · CASH CLOSE · WALLER HOLD · TSLA +5.4% / SPCX +6.4% · AVGO -2.7% after \$16.7B · CYBERCAB 5:45 ET

S&P 7,747.71 +1.06%. Nasdaq 26,584 +1.40%. 10y 4.76%. 30y 5.24%. Hike odds ~48% from ~63%. TSLA \$376 +5.4% (H \$384, L \$366). SPCX \$150 +6.4% (H \$152, vol 121m). AVGO \$357 -2.7% (L \$342) after \$16.7B AI / Q4 \$34.8B vs ~\$35B / FY27 AI \$115B. DELL \$516 +4.9%. WTI \$91.66. Claims 206k. Cybercab 5:45 ET, not in this close. Jobs Fri ~58k.

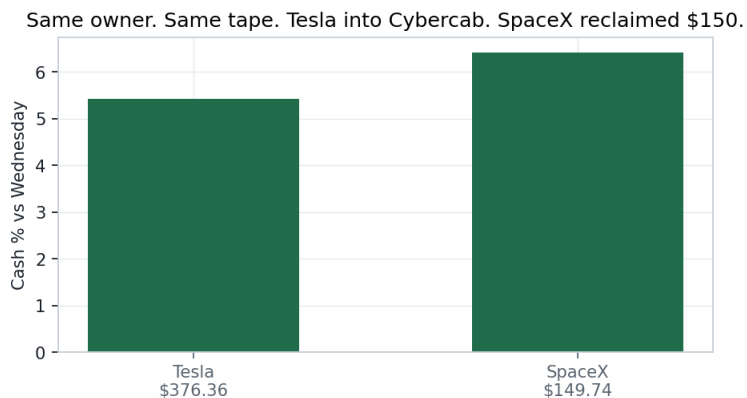
	Close	Day
S&P / Nasdaq / Dow	7,748 / 26,584 / 53,686	+1.06 / +1.40 / +1.18
WTI / 10y / 30y / claims	\$91.66 / 4.76% / 5.24% / 206k	tagged \$93, held \$89 · Jobs Fri
Tesla / SpaceX	\$376 / \$150	event bid / \$150 reclaim, unlock 9 Sep
Broadcom	\$357.16	-2.74% · AI \$16.7B · Q4 \$34.8B vs ~\$35B
Dell / Nvidia	\$516 / \$228	+4.9% paid again · held \$220s
Palantir / CrowdStrike	\$183 / \$215	+7.7 / +5.7 · duration bounce
Name	Close	One line
Nvidia	\$228.45 +1.80%	Held \$220s. Vol 131m.
Apple	\$328.21 +1.00%	Event 9 Sep. Quiet.
Microsoft	\$510.12 +2.68%	Duration bounce.
Alphabet	\$342.48 +1.59%	Quiet.
Amazon	\$258.90 +1.54%	Oil leak did not extend.
Meta	\$610.68 +3.01%	Bid with duration. H \$619.
Tesla	\$376.36 +5.42%	H \$384. Cybercab 5:45 ET.
SpaceX	\$149.74 +6.42%	H \$152. Vol 121m. Unlock 9 Sep ~319m.
Palantir	\$182.53 +7.71%	Duration bounce after -5.8%.
Micron	\$958.16 +0.22%	Sat. L \$919.
Sandisk	\$1,554.99 +0.10%	Same dummy as Micron.
AppLovin	\$313.58 -1.71%	Quiet leak. No unique wire.
AMD	\$456.16 -0.20%	SOX lag. L \$440.50.
Broadcom	\$357.16 -2.74%	L \$342. Sold \$34.8B vs ~\$35B.
Marvell	\$208.83 +1.14%	Did not sell with Broadcom.
Palo Alto	\$331.94 +1.05%	Bounce. Has not seen \$350.
Dell	\$516.39 +4.91%	H \$531. Paid the \$95B again.
CrowdStrike	\$214.97 +5.68%	Software duration bounce.
Oracle	\$154.04 +5.69%	Kit-adjacent bid.
Credo	\$164.17 -0.64%	Held \$161s after Wed -20%.
MongoDB	\$384.45 +2.41%	Bounce after Wed -13.5%.

Call: take Waller's meeting. Pay Tesla into 5:45. Treat AVGO red as the \$34.8B penny, not AI-over. SpaceX \$150 is Tesla beta until 9 Sep. Dell held the backlog. Jobs Friday. NFA.

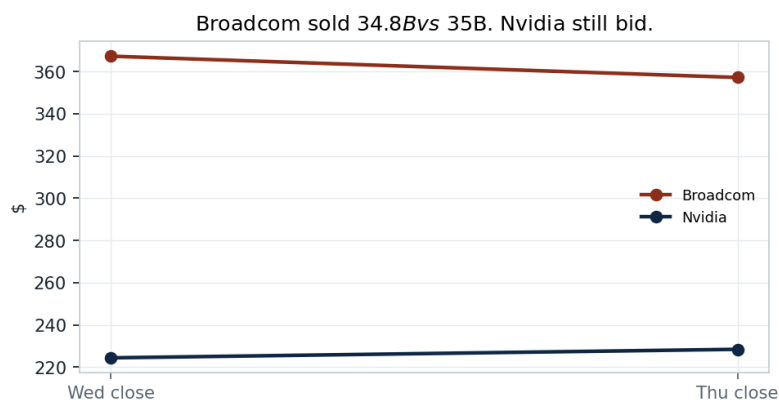
- Cybercab tonight / Fri: hold \$365s vs lose \$350.
- Jobs ~58k: 10y vs 4.80%.
- AVGO \$367 reclaim vs \$342 lose.
- SPCX \$145-\$152 into 9 Sep ~\$319m.
- DELL \$490s hold.
- NVDA \$224 hold.



Tesla/SpaceX together. Broadcom the other way.



Same owner. Same tape.



Broadcom sold the penny. Nvidia bid.

Not financial advice. Cash close. Cybercab 5:45 ET not in this print. Audio on hold.