

Market Briefing · Monday, September 21, 2026

Prices as of the New York cash close, about 4:00 p.m. Eastern. Session closed. Live X via the Panke plugin. Not investment advice.

This was a Muse-and-CPU-kit day, and a Grok-4.7-and-Flight-14-clock day, not a SpaceX Nasdaq-100 squeeze and not an 8% oil smash.

Meta (META) \$741.24, +11.34%, high \$753, volume 48.5 million, 2.32 times the 10-day. Wells Fargo lifted the target to \$796 from \$640 on Muse traction into Connect, Wednesday 23 September and Thursday 24 September. ARM +17.16%. Intel +12.14% on 189 million shares. AMD +9.95% and a \$1 trillion tag. SOX +4.29%. Grok 4.7 shipped. Elon: in 7 days the first Starship to orbit carries Starlink V3 for operational use. SpaceX moved Booster 21 to the pad.

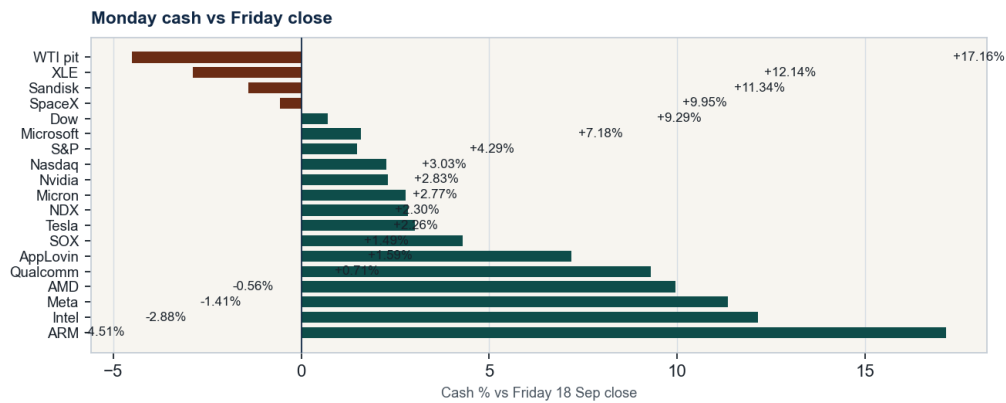
The exception is SpaceX (SPCX) \$151.85, -0.56%, high \$158.13, low \$151.64, Yahoo volume 81 million, 0.73 times the 10-day, first cash session of the new Nasdaq-100 weight. Sandisk (SNDK) \$1,766.64, -1.41%, first S&P 100 day. Pit WTI lost the \$100s and settled \$95.78.

One-line take: CPU kit paid Muse. SpaceX tagged \$158s and leaked the first day of the new weight into Thursday's float. Grok 4.7 and the factory clock sit on SpaceX anyway.

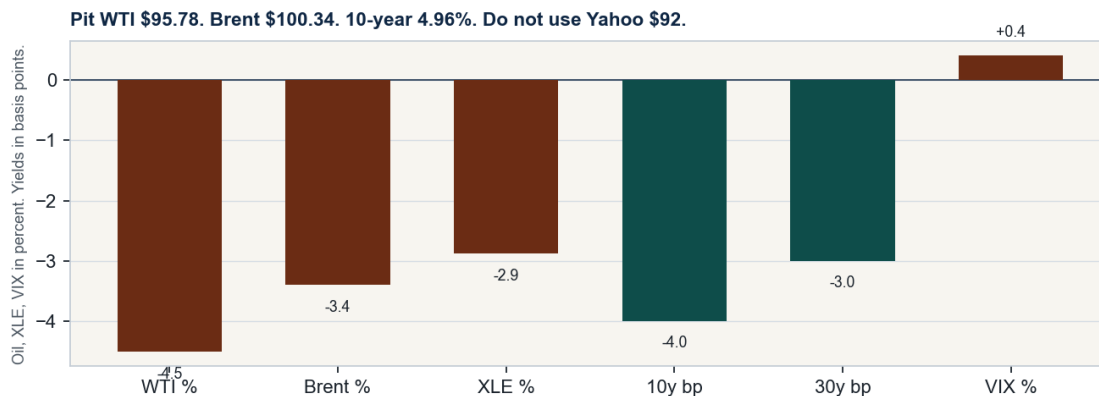
1. Market snapshot

Index	Close	Day	Note
S&P 500	7,764.70	+1.49%	Prev 7,650.50. Range 7,691-7,779. Kit paid the average.
Nasdaq Comp	27,122.09	+2.26%	Low 26,707. High 27,184. FirstSquawk wrap +1.5% / NDX +2.8%.
NDX	30,482.35	+2.83%	QQQ \$741.47, +2.77%. SpaceX new weight, first session.
Dow	52,048.83	+0.71%	Low 51,748. High 52,129. Trailed kit.
SOX	12,433.17	+4.29%	Open 12,146. High 12,492. Low 12,059. Fifth green day.
QQQ / SPY	\$741.47 / \$773.50	+2.77% / +1.55%	Nasdaq led. SPY paid more than Friday's leak.
Russell 2000	IWM \$285.58	+0.52%	High \$286.45. Quiet versus kit.
VIX	14.87	+0.41%	Yahoo prior 14.81. High 15.13. Low 14.60. Barely up on a rip.
10y / 30y	4.96% / 5.30%	10y -4 bp	Yahoo 10y 4.963% from 4.998%. 30y 5.296% from 5.331%.
WTI / Brent	\$95.78 / \$100.34	-4.51% / -3.4%	FirstSquawk pit. Do not use Yahoo CL=F \$91.97.
XLE / USO	\$62.46 / \$148.16	-2.88% / -3.68%	Crude lost \$100. Energy stocks followed, did not smash the average.
TLT	\$81.80	+0.68%	Duration bid as the 5% 10-year handle leaked.

Name	Close	Day	Tape note
ARM (ARM)	\$322.90	+17.16%	H \$324, L \$293. Vol 13m, 2.77x. CPU lead.
Intel (INTC)	\$121.78	+12.14%	H \$125, L \$115. Vol 189m, 1.65x.
Meta (META)	\$741.24	+11.34%	H \$753, L \$680. Vol 48.5m, 2.32x. Muse / Connect.
AMD (AMD)	\$615.52	+9.95%	H \$617, L \$582. Vol 44m, 1.92x. \$1T tag.
Strategy (MSTR)	\$168.50	+9.47%	H \$169.50. BTC ~\$86.8k, +6.9% vs Friday. Color.
Qualcomm (QCOM)	\$194.23	+9.29%	H \$195, L \$179. Friday unwind bounced.
AppLovin (APP)	\$330.17	+7.18%	H \$337, L \$307. Duration bid. Friday leak reversed.
SMCI	\$41.20	+5.40%	H \$41.72, L \$40.00. Friday leak reversed.
Marvell (MRVL)	\$257.38	+5.38%	H \$261, L \$245. Kit follow.
CoreWeave (CRWV)	\$85.43	+5.00%	H \$87.25, L \$80.92. Vol 40m, 1.14x. Convert leftover bid.
CrowdStrike (CRWD)	\$249.35	+4.92%	H \$250, L \$231. Software follow.
Nebius (NBIS)	\$232.80	+4.14%	H \$238, L \$221. Wide follow.
Palantir (PLTR)	\$183.09	+3.07%	H \$183, L \$177. Quiet kit.
Tesla (TSLA)	\$375.21	+3.00%	Nasdaq. H \$378.36, L \$371.10. Vol 36.3m, 0.92x.
Arista (ANET)	\$205.42	+3.02%	S&P 100 leftover. Paid.
Micron (MU)	\$1,043.96	+2.77%	H \$1,064, L \$1,031. Held \$1,000.
TSMC (TSM)	\$445.14	+2.41%	H \$446. Kit follow.
Nvidia (NVDA)	\$227.38	+2.30%	H \$228.50, L \$221.56. Vol 109m, 0.96x.
Palo Alto (PANW)	\$371.76	+2.25%	S&P 100 leftover. Paid.
Netflix (NFLX)	\$73.36	+2.19%	Friday software leak bounced.
Amazon (AMZN)	\$258.45	+1.87%	H \$259. Quiet bid.
Microsoft (MSFT)	\$501.61	+1.59%	H \$502, L \$491. Reclaimed \$500s.
Alphabet (GOOGL)	\$354.97	+1.55%	H \$358, L \$349. Quiet versus Meta.
Western Digital (WDC)	\$448.17	+1.54%	Memory follow, not the lead.
Broadcom (AVGO)	\$362.66	+1.41%	H \$364. Kit, not the scream.
Dell (DELL)	\$575.31	+1.28%	H \$592, L \$567. S&P 100 leftover. Bid.
IREN	\$47.23	+1.18%	Crypto-adjacent leftover. Quiet.
Apple (AAPL)	\$338.98	+0.85%	H \$340, L \$333. Quiet.
SK Hynix (SKHY)	\$188.86	+0.73%	DRAM leftover. Quiet versus CPU.
Oracle (ORCL)	\$148.56	+0.64%	H \$150, L \$146.17. Held \$145s.
SpaceX (SPCX)	\$151.85	-0.56%	Nasdaq. H \$158.13, L \$151.64. Vol 81m, 0.73x.
Sandisk (SNDK)	\$1,766.64	-1.41%	H \$1,834, L \$1,737. S&P 100 day-one leak.



Monday cash versus Friday. ARM, Intel, Meta, and AMD paid. SpaceX leaked. Pit WTI lost \$100. Illustrative.



FirstSquawk pit WTI \$95.78, Brent \$100.34. 10-year 4.96%. Yahoo CL=F \$91.97 is a bad roll, not the pit.

Friday in one paragraph was memory through \$1,000 and SpaceX volume into the Nasdaq-100 reweight: SOX +2.78%, Micron \$1,015.80 through \$1,000, Sandisk +11.0% into Monday's S&P 100 add, SpaceX \$152.71 on 336 million Nasdaq shares into a weight that more than doubled, Tesla nicking \$360.75, pit WTI holding \$100.30, the 10-year back on 5.00%. Monday is the exam of those tests on the first session of the new SpaceX weight. SOX ripped again. Micron held \$1,000. Tesla stayed in the \$370s. SpaceX tagged \$158.13 and closed \$151.85. Sandisk leaked the add. Pit WTI failed \$100 and settled \$95.78. The 10-year eased to 4.96%. Grok 4.7 shipped during cash. Elon put Flight 14 on a 7-day clock with Starlink V3 for operational use. The cash leaked SpaceX. The news did not.

2. What actually drove the tape

There was no overnight collapse in AI demand. SOX closed +4.29%, the fifth green session after last Monday's -5.86%. ARM +17.16%. Intel +12.14%. AMD +9.95%. Meta +11.34%. Nvidia +2.30%. Micron held \$1,000 and printed \$1,043.96. SpaceX leaked 56 basis points on the first day of a Nasdaq-100 weight that Friday's flow had already paid, and still closed through \$150 after tagging \$158.13. What marked Monday cash was a CPU and Muse bid that the average could not ignore, a SpaceX leak into Thursday's float that the new weight did not squeeze, and an oil fade that lost the \$100s on the pit without an 8% Yahoo smash.

The \$15.5 to \$22 billion number from Friday sounded like a guaranteed squeeze into Monday. The more immediate issue is that the first cash session of the new weight printed SpaceX \$151.85, -0.56%, high \$158.13, low \$151.64, on 81 million Yahoo shares versus Friday's 336 million Nasdaq shares. Relative volume 0.73 times the 10-day. After-hours about \$152.50, +0.43% from cash, nothing that rewrites the

close. Friday was the mechanical flow. Monday was the first day the weight is live, and the tape treated it as a float exam, not as a melt-up. Eligibility is still not a forced sale. A first-day leak that holds \$151.64 is still a hold of Friday's \$150s test. It is not a cancelled rocket, and it is not Tesla leftover.

Kit did the work the average could not, and it was CPU and Muse, not another memory squeeze through \$1,000. SOX 12,433.17, +4.29%, high 12,491.61. ARM opened \$294.22, tagged \$293.08, ran \$324.16, closed \$322.90, +17.16%, volume 12.9 million, 2.77 times the 10-day. Intel opened \$116.59, tagged \$114.93, ran \$124.73, closed \$121.78, +12.14%, volume 189 million, 1.65 times. AMD \$615.52, +9.95%, high \$616.68, volume 44 million, 1.92 times. First Squawk (@FirstSquawk), 21 Sep: US stocks jumped as AI optimism drove a technology rally, with the S&P 500 rising 1.5% and Nasdaq 100 2.8%, while AMD surpassed a \$1 trillion valuation and Meta surged 11% (16 likes, 18k views). Qualcomm \$194.23, +9.29%, the Friday unwind bouncing. AppLovin \$330.17, +7.18%, Friday's duration leak reversing. Nvidia \$227.38, +2.30%, high \$228.50, low \$221.56, volume 109 million, 0.96 times. Broadcom +1.41%. TSMC +2.41%. Micron \$1,043.96, +2.77%, high \$1,064.49, low \$1,030.68. Friday's leftover test was hold \$1,000. They passed it. Sandisk \$1,766.64, -1.41%, high \$1,834, low \$1,737, first day of the S&P 100 add. They failed the hold-the-add test. That is memory versus the add, not a kit-break. Dell +1.28%. Palo Alto +2.25%. Arista +3.02%. The three other Monday adds paid. Sandisk leaked.

Meta was the software scream inside the same kit. Open \$680.38, low \$679.60, high \$753.00, close \$741.24, +11.34%, volume 48.5 million, 2.32 times the 10-day. Walter Bloomberg (@Deltaone), 21 Sep: \$META - META shares extend gains, last up 10.4% (821 likes, 158k views). Wells Fargo lifted the price target to \$796 from \$640 and kept Overweight, citing Muse downloads and daily users into Meta Connect on 23-24 September. SensorTower numbers in that note: 264,000 US downloads on 19 September and 448,000 daily active users on 18 September. The tempting \$796 is a target into an event, not a print Connect already delivered. Microsoft \$501.61, +1.59%, reclaimed the \$500s after Friday lost them. Alphabet \$354.97, +1.55%, high \$357.58, quiet versus Meta. Amazon +1.87%. Apple +0.85%. Palantir +3.07%. CoreWeave \$85.43, +5.00%, holding the \$80s after Thursday's convert. Oracle \$148.56, +0.64%, low \$146.17. Friday's leftover test was hold \$145s. They passed it.

Yields did the opposite of Friday. Yahoo 10-year 4.963% from 4.998%, about 4 basis points easier, high 4.976%. 30-year 5.296% from 5.331%. TLT \$81.80, +0.68%. VIX 14.87, +0.41% from 14.81, a nothing print on a 2% Nasdaq day. Cash matches the direction. Yahoo S&P 7,764.70, +1.49%. Nasdaq 27,122.09, +2.26%. Dow 52,048.83, +0.71%. Duration bid as oil lost \$100. Kit bid anyway. That is the split inside the average, not a smash, and not a rates panic.

Oil leaked a fourth session and lost the \$100s on the pit. First Squawk pit: US crude \$95.78, down \$4.52, 4.51%. Brent \$100.34, down \$3.53, 3.4%. Brent tagged below \$100 for the first time since 9 September and settled back through the handle. Yahoo CL=F last \$91.97 is a continuation and roll mess. Do not ship it as the pit. USO \$148.16, -3.68%. XLE \$62.46, -2.88%. First Squawk, 21 Sep: US crude oil futures settle 4.51% lower at \$95.78/bbl, down \$4.52 (10 likes, 18k views). First Squawk: Brent crude futures settle 3.4% lower at \$100.34/bbl, down \$3.53 (7 likes, 19k views). First Squawk: Brent crude futures drop below \$100/bbl for the first time since September 9 (33 likes, 25k views). Walter Bloomberg: oil slides as Saudi flows defy disruption. Saudi shipments through Hormuz have averaged 2.9 million barrels a day versus 700,000 in August (609 likes, 152k views). Same desk: Saudi Aramco loaded 14 million barrels of crude on seven VLCCs from Gulf terminals on Sunday (821 likes, 158k views). DOE data Monday: the Strategic Petroleum Reserve fell to 284.6 million barrels last week, the lowest since October 1982. Diesel is the other side of the

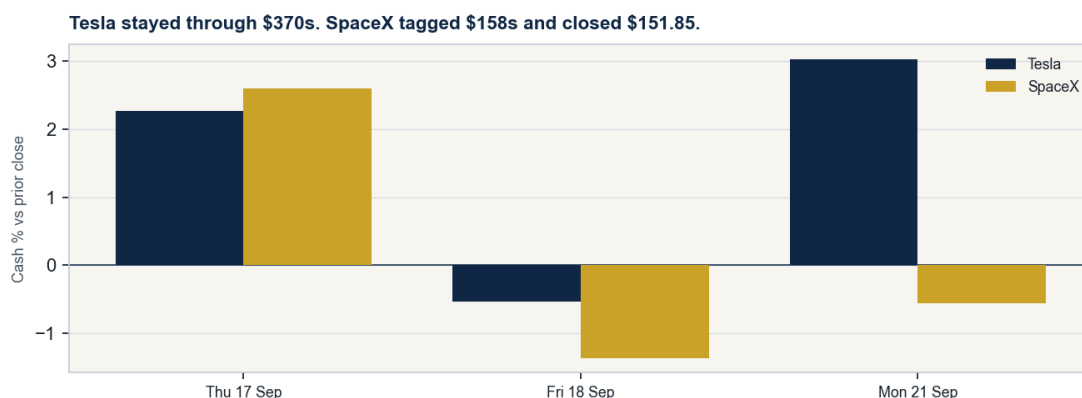
same fade. First Squawk: US diesel prices have risen above \$6.50 a gallon for the first time, even as WTI falls below \$100 (40 likes, 23k views). Walter Bloomberg: US diesel hits record \$6.51 a gallon (739 likes, 152k views). Crude lost the squeeze. The product crack did not. Do not write Monday as peace in the Gulf, and do not import Yahoo \$92.

SpaceX cash was the leak, not the squeeze. Open \$154.77, high \$158.13, low \$151.64, close \$151.85, -0.56% or -\$0.86, Nasdaq cash \$151.85 at 4:00 p.m. Eastern, Yahoo volume 81 million versus Friday 336 million, 0.73 times the 10-day. After-hours about \$152.50, +0.43% from cash, nothing. Friday's leftover test was hold \$150s after the new weight. They tagged \$158.13, lost the rip, and closed \$151.85. That is a hold of \$150s and a fail of the squeeze story. Tesla opened \$371.64, tagged \$378.36, printed \$371.10, closed Nasdaq \$375.21, +3.00% or +\$10.94. Yahoo \$375.30, +3.03%. Volume 36.3 million, 0.92 times. After-hours about \$374.95, -0.07%, nothing. Friday's leftover test was hold \$360s and stay \$370s. They stayed in the \$370s. That is Tesla paying the session. It is still not permission to call SpaceX leftover. SpaceX is the lead. The news on SpaceX today is Grok 4.7, Booster 21, and a 7-day factory clock. The cash leaked. The news did not.

So what? CPU and Muse paid the average. The new SpaceX weight showed up as Friday's volume and not as Monday's close. Oil wrote the \$100 fail on the pit. Do not mash Monday as AI is over, and do not write \$22 billion as a squeeze the first live-weight session refused.

3. The split that mattered: CPU and Muse versus SpaceX into Thursday's float

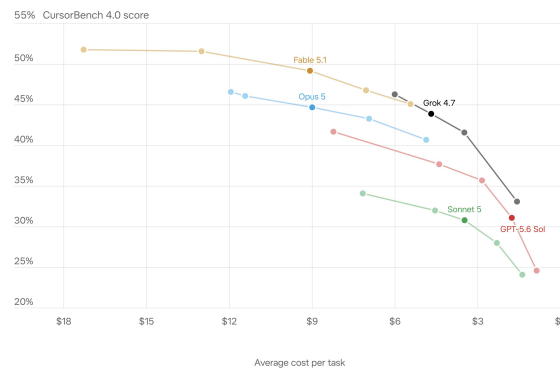
SpaceX is the lead name. Sentiment cycle: unlock anxiety never left after 9 September's 319 million eligibility, and Friday's 336 million shares into the reweight did not wash it out. Monday that tell had to survive the first session of the new weight with the 24 September float sitting three sessions out. Cash opened \$154.77, tagged \$158.13, printed \$151.64, and closed \$151.85 on 81 million shares. Crowding: the tempting story was that a doubled Nasdaq-100 weight would lift the name through Monday. Owners: whoever needed a squeeze did not get the print. Whoever needed a forced-sale smash on day one of the new weight did not get that either. Fundamentals today flipped better on Grok 4.7, on Booster 21 at the pad, on Elon's 7-day orbital clock with Starlink V3 for operational use, and on the weekend Falcon 9 that flew 27 Starlink satellites and the first 40th flight of a fairing half. NASA's \$946 million for Crew-15, Crew-16, and Crew-17 is still leftover from Friday. A SpaceX leak on the first day of the new weight is SpaceX. A model ship and a factory clock are SpaceX. Neither is Tesla leftover.



Tesla \$375.21, +3.00%, stayed \$370s. SpaceX \$151.85, tagged \$158.13, leaked. Same session. Not the same leftover.

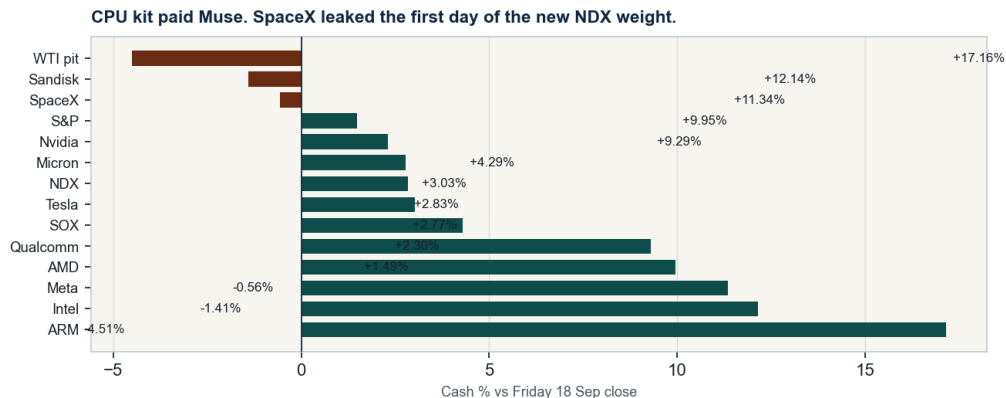


SpaceX · 21 Sep · Booster 21 moved to the pad at Starbase. 10,190 likes, 2.34 million views.



SpaceXAI · 21 Sep · Grok 4.7 is here. Same price and speed as 4.6. Product-now on the SpaceX side.

CPU and Muse are the other side of the same Monday, and they paid. Cycle: ARM, Intel, and AMD were not washed out. Friday they followed memory. Monday they led. Crowding: Meta into Connect is the crowded software exam. Cash opened \$680, tagged \$753, and closed \$741. Owners: whoever needed Muse as a nothing-burger did not get the print. Whoever needed \$796 as already delivered did not get Connect. Fundamentals today did not print a new Meta quarter. They printed a Wells target and a usage note into Wednesday. ARM +17.16% and Intel +12.14% on 189 million shares is the CPU side of that same kit bid. AMD's \$1 trillion tag is the First Squawk wrap, not a new foundry print. That is why this is the split and not 'AI is over.' Sandisk -1.41% on S&P 100 day one is the name leak inside the same SOX. Kit and SpaceX do not need Sandisk to be a good industrial day. Kit had one. SpaceX had the model and the factory clock anyway.



ARM +17.16%. Intel +12.14%. Meta +11.34%. AMD +9.95%. SOX +4.29%. SpaceX -0.56%. Sandisk -1.41%. Pit WTI -4.51%.



Sawyer Merritt · 21 Sep · Energy to intelligence. Close the Megapack and the factory clock on Grok compute, not on Tesla leftover.

4. Earnings and company news

xAI / Grok, SpaceX side: SpaceXAI, 21 Sep: Grok 4.7 is here. It's a notable improvement over Grok 4.6 at the same price and speed (22,300 likes, 7.57 million views). Thread: works longer on difficult tasks, checks its work more carefully, strongest safeguards to date. Available now in Cursor and Grok Build, and the Grok API. Elon: Grok 4.7 is a strong combination of intelligence, speed and low cost (15,896 likes, 15.1 million views). Elon: Grok 4.7 places SpaceXAI as third, after Anthropic and OpenAI, for agentic coding. When factoring in that Grok is significantly faster and lower cost, it's a great choice for your everyday workhorse (10,077 likes, 7.40 million views). Elon: Grok 4.7 works extremely well with our Build harness. Sawyer Merritt (@SawyerMerritt), 21 Sep: Grok 4.7 has officially launched. SpaceXAI: the model is better at verifying its own work and managing longer context, trained to natively understand the Grok Bot harness (989 likes, 65k views). Friday's Grok Voice Transcribe 2.0 still shipped. Keep Transcribe 2.0 and 4.7 as two facts, not duplicates. Close it on Grok compute sitting on the SpaceX stack, not on Tesla.

	Grok 4.7 xHigh	Grok 4.6 High	GPT-5.6 Sol Max	Fable 5.1 Max
Input token price \$ per million	\$2	\$2	\$4	\$10
Output token price \$ per million	\$6	\$6	\$20	\$50
Software engineering CursorBench 4.0	46.3%	40.4%	41.7%	51.8%
Software engineering DeepSWE v1.1	71.0%*	65.2%	72.7%	70.0%
Electrical engineering EEBench	64.0%	53.0%	39.4%	56.4%
Multi-Hour office work AA-Briefcase v1.1	1657	1546	1487	1678
Multi-Hour terminal work Terminal-Bench 4.0	38.0%	20.3%	37.3%	57.9%
Legal work Harvey Legal Agent	19.6%	15.8%	2.5%	6.7%
Clinical reasoning HealthBench Pro	56.7%	48.5%	60.5%	62.1%

*High Effort

SpaceXAI · 21 Sep · Grok 4.7 card. Keep Friday's Transcribe 2.0 as a separate ship.

SpaceX factory and Starlink: Elon, 21 Sep: In 7 days, the first Starship launch to orbit will be carrying Starlink V3 satellites intended for operational use (22,443 likes, 2.32 million views). That is Flight 14 still as early as Monday 28 September, 8:15 a.m. Eastern, pending regulatory approval, now said as a 7-day clock during Monday cash. SpaceX: Booster 21 moved to the pad at Starbase (10,190 likes, 2.34 million views). Weekend: Falcon 9 launches 27 Starlink satellites from California (8,526 likes, 970k views). Fairing separation confirmed. Today's mission marks our first 40th flight of a fairing half (10,858 likes, 1.36 million views). Friday after-hours leftover: SpaceX, 18 Sep: We're excited for Falcon 9 and Dragon to launch NASA's Crew-15, 16, and 17 missions to the Space Station from Florida (7,724 likes, 4.33 million views).

Treat 24 September, up to 328.4 million shares, as the next dated float. Treat 28 September as the factory test. The calendar order is still float, then factory. The cash leaked. The clock did not.



SpaceX · 21 Sep · Booster 21 at the pad. Factory clock, not a cancelled Starship.



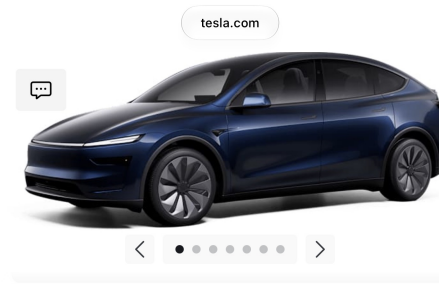
SpaceX · 20 Sep · Falcon 9, 27 Starlink from California. First 40th flight of a fairing half.



SpaceX · 18 Sep after the close · Crew-15, Crew-16, Crew-17 leftover. NASA cash through 2030.

Tesla: company quoted a rider. Tesla, 21 Sep: I've used FSD for like 90%+ of my miles since Saturday morning. Literally feels like magic. A demo drive might change your life (2,203 likes, 497k views). Sawyer: the Model Y L Launch Series is now officially sold out in the US for 2026, with new-order dates showing January-February 2027 for all configurations (2,124 likes, 106k views). Sawyer: Tesla FSD (Supervised) has officially been approved in Czechia, joining Belgium, the Netherlands, Denmark, Lithuania, Estonia, and Slovenia (2,517 likes, 99k views). Sawyer, overnight: Tesla released a new video of people in China sitting in the Cybercab for the first time. Even with my legs stretched out all the way, there's still plenty of room. It

feels more like a lounge (3,632 likes, 134k views). After cash, about 4:30 p.m. Eastern: Sawyer: Nvidia has announced that Tesla's Megapacks have officially been qualified for use in its DSX AI factory ecosystem. Nvidia launched DSX Ready for power and cooling products that meet AI-factory requirements (606 likes, 29k views, still printing). Weekend leftover: the last three fully new Tesla vehicles do not use a liquid paint shop, Semi powder coated, Cybercab RIM, Cybertruck stainless (6,614 likes, 218k views). FSD V14.3.10 started rolling Saturday. Cash stayed \$370s and closed \$375.21. After-hours nothing. Close all of it on the SpaceX stack: the robotaxi, the lounges, the Megapacks at the AI factory, and the Y L backlog still need launch, Starlink, and Grok compute.



Est. Delivery: Jan 2027 – Feb 2027

Delivery Arvada, CO, 80001

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Sawyer Merritt · 21 Sep · Model Y L Launch Series sold out in the US for 2026. New orders January-February 2027.



Sawyer Merritt · 21 Sep · FSD Supervised approved in Czechia. Close it on Grok inference.



Sawyer Merritt · 21 Sep after cash · Nvidia DSX Ready qualifies Tesla Megapacks for AI factories. Close on Grok compute.



Sawyer Merritt · 21 Sep · Sunrun / Tesla virtual power plant leftover. Energy to intelligence sits next to the factory clock.

No Monday earnings beat of the Home Depot / Klarna type. Meta is an event into Connect, not a quarter. Wells \$796 is a target, not a deliverable Connect already printed. CoreWeave is leftover: they held \$85.43, +5.00%, after Thursday's convert. Oracle held \$145s. Sandisk leaked the S&P 100 add. Dell, Palo Alto, and Arista paid it. That is the add split, not a kit-break.

5. Other noteworthy items

- Pit WTI \$95.78, -4.51%. Brent \$100.34, -3.4%. Brent tagged below \$100 and settled back through the handle. Yahoo \$91.97 is a bad roll. SPR 284.6 million barrels last week, lowest since October 1982 (DOE / EIA Monday). Aramco loaded 14 million barrels on seven VLCCs Sunday. Saudi Hormuz flows 2.9 million barrels a day versus 700,000 in August. Diesel above \$6.50, AAA \$6.51 record. Crude lost the squeeze. The product crack did not.
- Nasdaq-100 weight is live: SpaceX about 2.82% versus about 1.28% before Friday's close. Monday was the first session, not the squeeze. S&P 100 add Monday: Sandisk leaked. Dell, Palo Alto, and Arista paid.
- SpaceX Flight 14 still as early as Monday 28 September, 8:15 a.m. Eastern, pending approval. Elon said it as a 7-day clock with Starlink V3 for operational use. Next dated float Thursday 24 September, up to 328.4 million. Grok 4.7 shipped. Transcribe 2.0 still a Friday fact.
- Meta Connect Wednesday 23 September and Thursday 24 September. Wells \$796 from \$640 is the target into that event. Muse usage is the exam.
- Bitcoin about \$86,800, +6.9% versus Friday's ~\$81,200. Strategy +9.47%. Color, not the day name.
- No confirmed SMH-put print of the August \$129 million size in a wire we will stand on. Skip.
- Politics stays off the day name. Hormuz flows, SPR, and diesel are the oil odds.

6. What's buzzing on X

Live posts from Friday close through Monday cash, pulled on the Panke X plugin. Four camps. Quotes are the tell. Do not quote the house handle as a camp.

Camp 1 - Grok 4.7 shipped, and it is a workhorse, not a teaser. Mood: product-now on the SpaceX side. Transcribe 2.0 still counts.

"Grok 4.7 is here. It's a notable improvement over Grok 4.6 at the same price and speed."

@SpaceXAI · 21 Sep · 22,300 likes, 7.57m views

"Grok 4.7 is a strong combination of intelligence, speed & low cost"

@elonmusk · 21 Sep · 15,896 likes, 15.1m views

"Grok 4.7 places @SpaceXAI as third, after Anthropic & OpenAI, for agentic coding. When factoring in that Grok is significantly faster & lower cost, it's a great choice for your everyday workhorse."

@elonmusk · 21 Sep · 10,077 likes, 7.40m views

"Grok 4.7 has officially launched! SpaceXAI: The model is better at verifying its own work and managing longer context. We also trained Grok 4.7 to natively understand the Grok Bot harness."

@SawyerMerritt · 21 Sep · 989 likes, 65k views

What they are really saying: 4.7 is a ship today, not a countdown leftover. Keep Friday's Transcribe 2.0 as a second ship. Close Tesla's FSD quote on the same stack: the model sits here. Do not write SpaceX \$151.85 as the story of the model.

Camp 2 - Flight 14 in 7 days, Booster 21 at the pad, Starlink V3 for operational use. Mood: factory clock is live. Cash still leaked.

"In 7 days, the first Starship launch to orbit will be carrying Starlink V3 satellites intended for operational use"

@elonmusk · 21 Sep · 22,443 likes, 2.32m views

"Booster 21 moved to the pad at Starbase"

@SpaceX · 21 Sep · 10,190 likes, 2.34m views

"Falcon 9 launches 27 @Starlink satellites from California"

@SpaceX · 20 Sep · 8,526 likes, 970k views

"Fairing separation confirmed. Today's mission marks our first 40th flight of a fairing half!"

@SpaceX · 20 Sep · 10,858 likes, 1.36m views

What they are really saying: the factory is dated, not cancelled. V3 for operational use is the payload line. Weekend cadence is product-now. Thursday's 328.4 million is still the next dated float. Tesla stayed \$370s. Do not write SpaceX as leftover.

Camp 3 - Muse and the CPU kit paid the average. Mood: Meta is the event. ARM and Intel are the industrial tape.

"\$META - META SHARES EXTEND GAINS, LAST UP 10.4%"

@Deltaone · 21 Sep · 821 likes, 158k views

"US STOCKS JUMPED AS AI OPTIMISM DROVE A TECHNOLOGY RALLY, WITH THE S&P 500 RISING 1.5% AND NASDAQ 100 2.8%, WHILE AMD SURPASSED A \$1 TRILLION VALUATION AND META SURGED 11%. OIL PRICES FELL ON HOPES FOR DIPLOMATIC PROGRESS IN THE IRAN CONFLICT, WITH WTI DOWN 4.7% TO \$95.63 AND"

@FirstSquawk · 21 Sep · 16 likes, 18k views

What they are really saying: the average paid CPU and Muse. Wells \$796 is a target into Connect, not a quarter. AMD's \$1 trillion is a wrap tag. SpaceX leaking 56 basis points on the first day of the new weight is the exception, not proof the kit broke.

Camp 4 - Oil lost the \$100s on the pit. Diesel did not. Mood: barrels moved. The product crack did not.

"US CRUDE OIL FUTURES SETTLE 4.51% LOWER AT \$95.78/BBL, DOWN \$4.52"

@FirstSquawk · 21 Sep · 10 likes, 18k views

"BRENT CRUDE FUTURES SETTLE 3.4% LOWER AT \$100.34/BBL, DOWN \$3.53"

@FirstSquawk · 21 Sep · 7 likes, 19k views

"SAUDI ARAMCO LOADED 14 MILLION BARRELS OF CRUDE ON SEVEN VLCCS FROM GULF TERMINALS ON SUNDAY AS IT RAMPS UP EXPORTS THROUGH STRAIT OF HORMUZ, SHIPPING DATA SHOWS"

@Deltaone · 21 Sep · 821 likes, 158k views

"OIL SLIDES AS SAUDI FLOWS DEFY DISRUPTION. Saudi shipments through Hormuz have averaged 2.9 million bpd, versus 700,000 in August."

@Deltaone · 21 Sep · 609 likes, 152k views

"U.S. DIESEL PRICES HAVE RISEN ABOVE \$6.50 A GALLON FOR THE FIRST TIME, WITH WIDENING REFINING MARGINS AND TIGHT PRODUCT SUPPLIES DRIVING INFLATION PRESSURES EVEN AS WTI FALLS BELOW \$100 A BARREL."

@FirstSquawk · 21 Sep · 40 likes, 23k views

What they are really saying: Sunday's seven VLCCs and the 2.9 million barrel Hormuz average are the fade of the squeeze. \$95.78 is the pit, not Yahoo \$92. SPR at 284.6 million is the buffer running down. Diesel at \$6.51 is why this is not a clean peace tape. Do not import the roll.

What the camps are really saying, together: take Monday as CPU and Muse paying the average, take Grok 4.7 and the 7-day Flight 14 clock as SpaceX-side product-now, take SpaceX \$151.85 as an honest first-day leak into Thursday's float and not as a cancelled rocket, and take \$95.78 WTI as a lost \$100s floor next to a diesel crack that did not fade.

8. What to watch next

- SpaceX after tagging \$158.13 and closing \$151.85 on 0.73x volume: hold \$150s through Thursday 24 September = today's \$151.64 was a tag and the new weight did not smash the name. Lose \$150 on volume that cannot stop = Friday's \$149.93 reclaim is a memory. Hold \$150s through the float = eligibility is still not a forced sale. Float Thursday 24 September, up to 328.4 million, is the next dated exam. Flight 14 as early as Monday 28 September, 8:15 a.m. Eastern, pending approval, is the factory test. Elon's 7-day clock is that test said during cash.
- Tesla after staying \$370s and closing \$375.21: hold \$370s = Monday's \$371.10 was a tag. Lose \$360 on volume = they gave the stay back. Reclaim and stay \$380s = they paid more than a quiet follow. Close the FSD quote, the Y L sellout, and the Megapack DSX note on the SpaceX stack.
- Meta / Connect: hold \$700s into Wednesday = Monday's \$753 was a paid event bid. Give the 11% back before Connect talks = Wells \$796 was the crowd, not the print. Connect 23-24 September is the usage exam.
- Micron / memory: hold \$1,000 / \$1,030 = Monday's \$1,064 was a paid hold. A Tuesday that dies back under \$1,000 is still a lower high. Sandisk: reclaim the S&P 100 add without another day-one leak. Intel: hold \$115s / \$110 = the CPU rip was a bid.
- 10-year after closing 4.96%: stays under 5.00% with oil leaking = duration bid the oil fade. Back through 5.00% = Monday was a one-day fade of Friday, not a new 4.90s regime. Under 4.95% and stays = Friday's 5% handle is the memory.

- Brent / WTI: WTI holds \$95s after settling \$95.78 = the \$100 fail is a floor, not a crash. Fail \$94 and settle back = the fade is still running. Brent loses a \$100 settle = the squeeze premium is gone. SPR 284.6 million and diesel \$6.51 are the split tests. Do not use Yahoo \$92.
- Oracle: hold \$145s = Friday's reclaim stayed. Die \$140 on volume = last week's after-hours is still a memory. CoreWeave: hold \$80s after the convert bid. ARM / AMD: a bounce that dies under Monday's open is still a one-day CPU scream. Grok 4.7 is shipped. Transcribe 2.0 still counts. Cybercab leftover 30 September.

Method: Yahoo v8 daily bars 21 Sep versus Friday 18 Sep for cash names and indexes. Tesla Nasdaq info close \$375.21 at 4:00 p.m. ET, after-hours about \$374.95. SpaceX Nasdaq info close \$151.85 at 4:00 p.m. ET, after-hours about \$152.50, Yahoo volume 81 million, 0.73 times the 10-day. Oil from First Squawk pit settle WTI \$95.78 / Brent \$100.34. Yahoo CL=F \$91.97 rejected as a roll. Unlock counts from the 424B4 schedule (24 Sep up to 328.4 million). SPR 284.6 million from DOE / EIA Monday. Wells Meta \$796 from \$640 from the 21 Sep note. Live X: Panke plugin (plugin-x-x), get_users_me @spcxGOD, get_usage_credits, get_users_posts
 Elon/Tesla/SpaceX/SpaceXAI/Sawyer, search_posts_all FirstSquawk/Deltaone/Sawyer, start_time 18 Sep 20:00 UTC. Do not quote the house handle as a camp. Audio on hold. No email. NFA.

7. Independent view

1. Believe the CPU and Muse tape, not AI is over. ARM +17.16%, Intel +12.14% on 189 million shares, AMD +9.95% with a \$1 trillion tag, and Meta +11.34% into Connect is the fifth SOX bounce after last Monday's -5.86%. Sandisk -1.41% is a day-one add leak, not the chip index. Flip: SOX through Monday's 12,059 low on volume, with ARM giving the open back and Nvidia losing \$221.

2. SpaceX \$151.85, -0.56%, high \$158.13, low \$151.64 on 81 million shares is an honest leak on the first day of a Nasdaq-100 weight that Friday already paid with 336 million shares. That print is not a cancelled Starship and it is not Tesla leftover. Grok 4.7, Booster 21 at the pad, Elon's 7-day orbital clock with Starlink V3 for operational use, the weekend 27-satellite Falcon 9, and Friday's NASA crew leftover are the SpaceX-side facts. Unlock Thursday 24 September, up to 328.4 million, is still in front of Flight 14. Tesla stayed \$370s and closed \$375.21 because Tesla paid the session. Do not write SpaceX as leftover. Flip: lose \$150 on volume that cannot stop Tuesday, or a 24 September float that cannot hold \$145.

3. Oil is the \$100 fail, not an 8% smash. Pit WTI \$95.78. Brent \$100.34. Aramco loaded Sunday. Hormuz flows 2.9 million barrels a day. SPR 284.6 million, lowest since 1982. Diesel \$6.51 is the other tape. If you believe the barrels, this is the fourth session of that tell. If you believe the product crack, crude can leak and inflation odds stay live. Flip: WTI through \$94 on a confirmed restart that sticks, or WTI back through \$100 if Sunday's VLCCs were a one-day print. Do not use Yahoo \$92.

4. The 10-year leaked to 4.96%. Friday's 5.00% handle did not stay. Believe the oil-bid duration print today. Do not retire a 5% regime after one session, and do not declare a new 4.90s regime until 4.95% stays. Flip: 10-year back through 5.00% with oil leaking, or 10-year under 4.95% that holds.

5. Meta \$741 into Connect is an event bid. Wells \$796 is a target, not a usage print. CoreWeave held \$80s. Oracle held \$145s. Those are leftover financing and a held reclaim. Do not import them into SOX as an AI-demand miss, and do not write Connect as already delivered. Flip: META gives the \$700s back before Wednesday talks = the crowd was the target. META holds \$700s through Connect = Monday paid an event that showed up.

Bottom line: CPU and Muse paid. SpaceX leaked the first day of the new weight and still held \$150s. Grok 4.7, Booster 21, and the 7-day clock sit on SpaceX. The float is Thursday. The factory is Monday. NFA.