



CONCLUSION



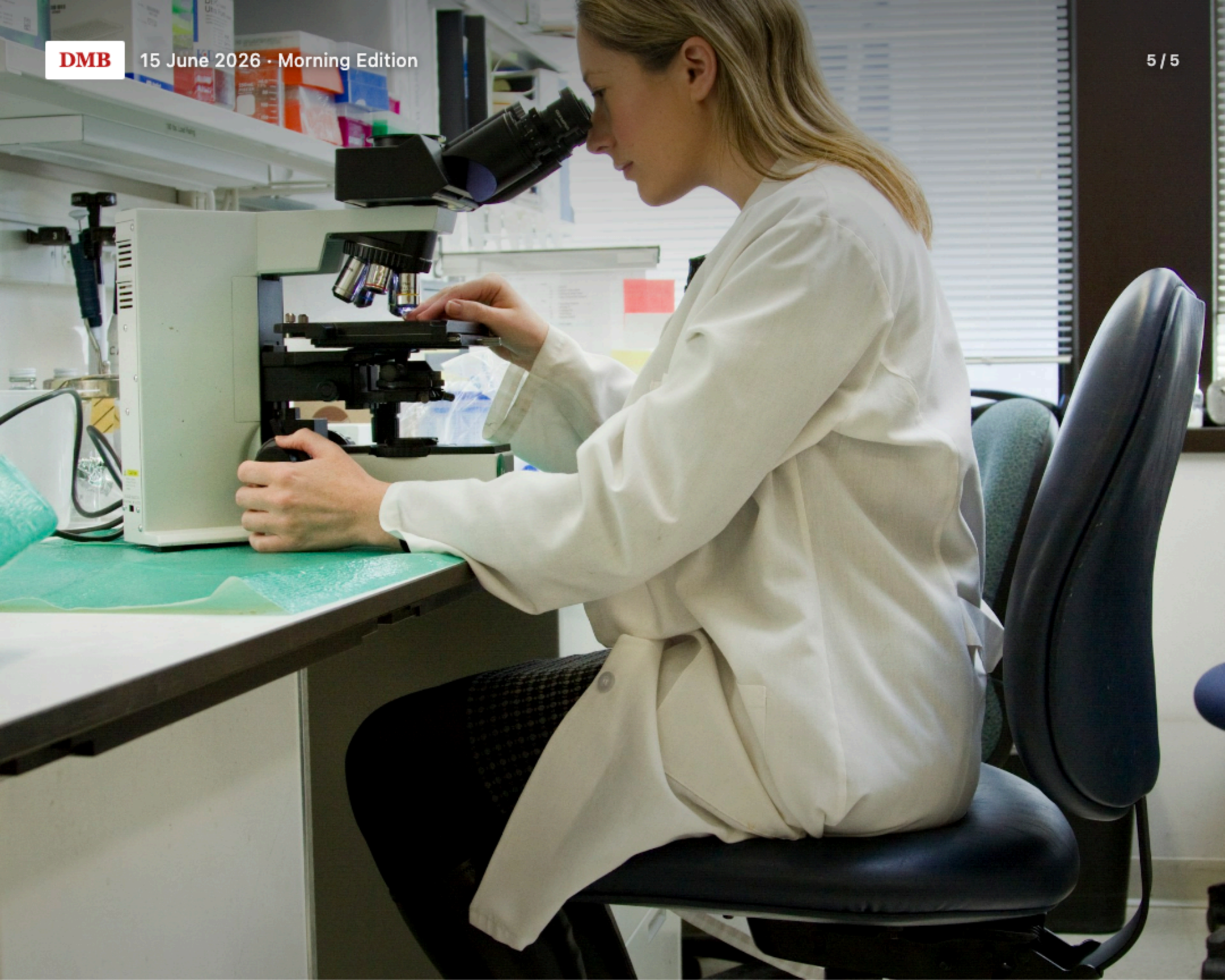
Peace has finally come to the Middle East after 100+ days of conflict, and global markets are celebrating in dramatic fashion.



After a strong Friday close, US futures point to a powerful Monday open as investors rotate from defense to offense.



Last week delivered three major economic shocks. This week, markets get to digest them — and prepare for the FOMC.



Energy and metals sold off as war premiums evaporated. Crypto joined the risk-on celebration.



**Peace changes everything.
Here's how the major asset
classes are positioned as
markets open.**
