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Key Data

- Headlines came out that judges blocked Donald trump's tariffs - 3 judges; it was a panel
- Futures are ripping because judges said liberation day wasn't supposed to happen in a sense
- Yields are going higher because this news reduces the safe haven bet
- Add this to the list of unexpected things this year
- This just blew up everything because it might sound good and technically no tariffs but now this just made things way more uncertain in the long run
- Also side question - why are there judges determining everything? Seems weird
- NVDA earnings weren't bad but bigger fish to fry now and the general vibe was good after the momentum this week
- Huge divergence right now. Its either we really go a lot higher or drop big. This is the call of the year, if you are right you are rewarded, if you are wrong you are punished. Problem is its been 6 months and a majority of people are break even on the year
- Be careful of certainty

Plays

- BABA - China should do really well if we rally off this tariff block
- NKE - I think they can have a 10% day tomorrow lol, think lulu, all those Vietnam exposed stocks
- NVDA - LAGGGGGGGGGG, watch the morning trade. Bloated af good opportunity that the contracts are gonna lag - looking @ june 13 155-165 strikes quick flips don't be certain



