1.30.25

Friday, January 31, 2025 8:20 AM

Key Data Points

- ORCL 1st tariff candle; market moved a lot on that trump news
- PCE tomorrow but don't be fooled by earnings like we said, today 400 names were up when the nasdaq was down 0.7%
- Winging it

Plays

- INTC earnings - wasn't that good; earnings have been mixed