

Markets regain ground...

July 3, 2026

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Market

- Stock markets are advancing and recovering some of the recent losses as concerns about high valuations associated with the artificial intelligence sector moderate. Nasdaq 100 futures rallied 1.1%, while Asian stocks posted gains of close to 2.0%, driven by the recovery of semiconductor and memory manufacturers such as SK Hynix and Samsung Electronics. In Europe, the Euro Stoxx 50 index advanced 0.55%, supported by the performance of the technology and utilities sectors, on a day marked by the closure of the U.S. markets due to the Independence Day holiday. Likewise, the dollar weakens and is heading for its worst weekly performance since May, against a backdrop of lower expectations of monetary tightening by the Federal Reserve, after the slowdown in the U.S. labor market and the recent moderation in energy prices reduced pressures on inflation. As a result, investors have shifted the expectation of the next 25 basis point increase in the benchmark rate to December. In this context, although doubts persist about the sustainability of the rally driven by artificial intelligence during the second quarter, investors' attention will now be focused on the next corporate reporting season, which will be decisive in assessing whether strong investments in technological infrastructure continue to translate into revenue and profit growth for the sector.

Economy

- At the end of the week, the [economic docket](#) is light but relevant.
- **Eurozone:** The June composite PMI increased to 50.0 from 48.5 in the previous month, coming in above forecasts of 49.5. This is mainly due to the advance of the services sector (49.4 vs. 47.7 previously).
- **Mexico:** Consumer confidence showed a marginal increase during May, standing at 43.8 points, compared to 43.1 recorded in the previous month.
- **Brazil:** Industrial production in May grew 0.2% on a year-on-year basis, well below the previous figure of 2.7% and market forecasts of 1.3%.

Currencies

- **Peso:** In the overnight session, the USD/MXN exchange rate showed bearish volatility and is now trading at \$17.45, which implies an appreciation of the peso by 0.08% compared to the previous close (a weekly advance of 0.31% and a loss of 0.61% compared to the previous month). Today, the peso operates in positive territory due to the weakness of the US dollar, while investors continue to wait for news on the trade front, given the beginning of the revision of the USMCA. The support and resistance levels are located at \$17.40 and \$17.50 respectively, in the interbank market.

Markets at the Opening

Currencies	Current	Var %
Dollar Index	100.78	-0.07%
Peso / Dollar	17.45	0.08%
Yen / Dollar	161.15	-0.02%
Swiss Franc / Dollar	0.80	0.06%
Canadian dollar. / Dollar	1.42	-0.15%
Euro / Dollar	1.14	0.14%
Pound Sterling / Dollar	1.34	0.08%
Bitcoin/Dollar	61,915.03	0.65%
Mdo. Money	Current	PB
Cetes28	6.48	14.00
TIE28	6.76	-13.06
Udibono 10a	3.94	-2.96
Mexico 10a	9.00	-1.23
Tbill 1M	3.61	1.38
Libor 1M	4.96	0.16
USA 10a	4.48	0.00
Japan 10th	2.78	0.15
Germany 10th	2.93	2.48
United Kingdom 10th	4.80	2.42
France 10th	3.73	2.03
Spain 10a	3.42	2.10
Brazil 10th	14.54	-2.32
Shareholders	Current	Var %
Nikkei	69,744	1.47%
Hang Seng	23,350	1.28%
Euro Stoxx 50	6,395	0.55%
Dax	25,713	0.52%
Cac 40	8,483	0.10%
Ibex 35	19,809	0.70%
FTSE 100	10,638	-0.14%
Ibex 35	19,809	0.70%
S&P/BMV IPC (Fut)	67,813	-0.25%
Dow Jones (Fut)	53,078	-0.20%
S&P 500 (Fut)	7,553	0.33%
Nasdaq (FUT)	29,908	1.19%
Commodities	Current	Var %
Gold (USD-oz)	4,173.97	1.25%
Silver (USD-oz)	62.13	2.00%
Copper (USD-POUND)	6.11	-0.15%
Petr. WTI (Barrel)	68.27	-0.61%
Petr. Brent (barrel)	71.51	-0.40%
Mex Blend. (Barrel)	62.68	-0.67%
N. Gas (usd/MMBtu)	3.24	1.47%

Source: Monex with data from Bloomberg.

Currencies

- **Dollar Index:** Down 0.07%, considering the U.S. holiday.
- **Euro:** Up 0.14%, considering the bloc's strong PMIs report.
- **Pound:** Advances 0.08%, favored by the weakening of the dollar.
- **Bitcoin:** Up 0.65%, regaining investor appeal.

Fixed Income

- **The 10-year U.S. Bond** is unchanged and stands at 4.48%.
- **Mexico's 10-year bond** has adjusted 1.23bp to 9.00%.

Equities

- **Stock markets in Asia** closed positive, highlighting the Nikkei's 1.47% advance.
- **The stock markets in Europe** show mixed movements, where the Euro Stoxx presents an advance of 0.55%.
- **In the US**, futures are trading positively, highlighting the Nasdaq's 1.19% advance.

Commodities

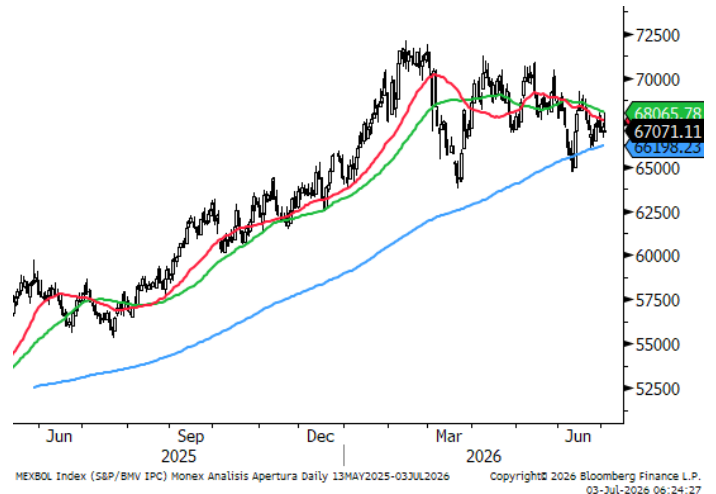
- **Commodity prices** show mixed movements, highlighting the advance of silver of 2.00%.

Mexico

Peso / Dollar



S&P/BMV IPC



	Closing Price	Average 10 days	%	Average 50 days	%	Average 200 days	%	RSI (14) days
Currencies								
Peso / Dollar	17.45	17.50	-0.3%	17.36	0.5%	17.76	-1.7%	54
Dollar Index	100.78	101.21	-0.4%	99.55	1.2%	98.92	1.9%	57
Dollar / Euro	1.14	1.14	0.4%	1.16	-1.2%	1.17	-1.8%	44
Dollar/Pound Est.	1.34	1.33	0.8%	1.34	-0.4%	1.34	-0.3%	55
Yen / Dollar	161.14	161.78	-0.4%	159.64	0.9%	156.80	2.8%	55
Real Bra. / Dollar	5.20	5.18	0.3%	5.06	2.7%	5.24	-0.9%	61
Canadian dollar. / Dollar	1.42	1.42	0.0%	1.39	2.3%	1.38	2.6%	74
Yuan/Dollar	6.78	6.79	-0.1%	6.79	-0.2%	6.96	-2.5%	49
Bitcoin/Dollar	61,917.87	60,201.32	2.9%	67,406.26	-8.1%	74,980.56	-17.4%	45
Indexes								
S&P/BMV IPC	67,071	67,153	-0.1%	68,066	-1.5%	66,198	1.3%	46
Dow Jones	52,900	52,030	1.7%	50,556	4.6%	48,443	9.2%	71
S&P 500	7,483	7,431	0.7%	7,395	1.2%	6,943	7.8%	54
Nasdaq	25,833	25,831	0.0%	25,912	-0.3%	23,703	9.0%	48
FTSE 100	10,638	10,512	1.2%	10,392	2.4%	10,087	5.5%	64
Dax	25,715	25,040	2.7%	24,688	4.2%	24,277	5.9%	66
Cac 40	8,483	8,401	1.0%	8,217	3.2%	8,144	4.2%	62
Ibex 35	19,809	19,509	1.5%	18,432	7.5%	17,317	14.4%	74
FTSE MIB	52,748	51,913	1.6%	50,199	5.1%	45,919	14.9%	63
Nikkei	69,744	70,153	-0.6%	65,198	7.0%	54,957	26.9%	55
Hang Seng	23,350	23,250	0.4%	25,121	-7.0%	25,896	-9.8%	36
Bovespa	172,788	171,546	0.7%	176,737	-2.2%	168,980	2.3%	51
Euro Stoxx 50	6,396	6,284	1.8%	6,063	5.5%	5,849	9.3%	67
Commodities								
Petr. WTI (Barrel)	68.27	70.53	-3.2%	89.84	-24.0%	74.28	-8.1%	26
Gold (USD-oz)	4,174	4,077	2.4%	4,402	-5.2%	4,483.41	-6.9%	46
Silver (USD-oz)	62.13	60.01	3.5%	71.31	-12.9%	70.11	-11.4%	40
Copper (USD-POUND)	611.45	615.94	-0.7%	625.25	-2.2%	566.23	8.0%	41
N. Gas (usd/MMBtu)	3.24	3.23	0.4%	3.03	7.2%	3.46	-6.2%	55
ETFs								
Edc* (Emerg. 3XBull)	1,368	1,537	-11.0%	1,497	-8.6%	1,162	17.7%	41
Edz* (Emerg. 3XBear)	294	262	12.3%	290	1.4%	504	-41.7%	57
Fas* (Finan. 3X Bull)	2,830	2,638	7.3%	2,395	18.2%	2,599	8.9%	74
Faz* (Finan. 3X Bear)	623	669	-7.0%	735	-15.3%	756	-17.6%	21

United States

DXY



DXY Curncy (DOLLAR INDEX SPOT) Monex Analisis Apertura Daily 13MAY2025-03JUL2026 Copyright© 2026 Bloomberg Finance L.P. 03-Jul-2026 06:24:45

Dow Jones



INDU Index (Dow Jones Industrial Average) Monex Analisis Apertura Daily 13MAY2025-03JUL2026 Copyright© 2026 Bloomberg Finance L.P. 03-Jul-2026 06:25:04

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