



RESEARCH NOTE

Wednesday, February 24, 2021

Planned One-Day Personal Holiday, Calendar

There are various reasons why we took today as a personal holiday. All of our analysis remains exactly the same as Tuesday's 'Not a Powell Put'.

We will be returning to the office Thursday morning with our typical full macro factor analysis of global events, and a fully updated Evolutionary Trend View of US equities and other markets.

Thanks for your patience during our one-day break.

Reports & Events

While still obviously less relevant (as we have been noting for some time and is most glaringly apparent again at present) on the standard report releases in the midst of more major global trade and political cross currents, the Weekly Report & Event Calendar (accessible for Sterling and higher level subscribers) is available via the www.rohr-blog.com sidebar.

As we have been noting for some time, regularly scheduled releases are in general obviously less relevant in the face of the COVID-19 'macro' factors that remain important despite the change of administration and control of the Senate in the US. In fact, there have been so many tumultuous developments in this short month (impeachment trial, US big freeze into the Deep South and even Mexico, initiatives from the new US administration, etc.) that it was easy to overlook how quickly we are back to the end of month economic data tsunami.

While Monday is a bit light, it still sees the Chinese PBoC rate decision, German IFO, Dallas Fed Manufacturing Index, and wraps up with UK PM Johnson's Commons speech on his COVID-19 Reopening Plan. Tuesday sees significant European and UK data, the OECD G20 International Trade Statistics, and the Senate phase of Fed Chair Powell's Semiannual Monetary Policy Report to Congress into Wednesday's second phase in the House after an RBNZ rate decision and press conference, and German GDP among other data.

Of course, Thursday begins the classical intensification of late month data from everywhere along with the recently more influential US Initial and Continuing Jobless Claims. Yet as usual, Friday is the classical monster last reporting day of the month. In addition to the Asian, European, US and Canadian data, it is also the kickoff of the preliminary first G20 finance ministers and central bank governors meeting under the 2021 Italian Presidency (the precursor to the more major October meeting) through Saturday.

Of course, the troubling emergence on the near-term vagaries of the COVID-19 pandemic that now includes news of the new virus variants, now partially offset to some degree by the more effective US vaccination program, will continue. As such, we maintain our recent advice that has been fully vindicated again in so many ways of late: Keep those seat belts firmly fastened.

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