MORNING NEWS CALL

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EUROPE EDITION

WEDNESDAY, OCTOBER 28, 2026



MARKET VIEW

Euro STOXX 50 futures were down 15 points at 6,166, **FTSE futures** lost 20.5 points to 10,696, **German DAX futures** dropped 61 points to 25,657, by 0530 GMT.

Asia stocks rallied after a resurgence in AI enthusiasm ahead of earnings from industry bellwethers later in the US day, while the **dollar** was perky ahead of a Federal Reserve policy decision.

Oil prices climbed more than 1% after an attack on a refinery in Saudi Arabia renewed concerns around supply risks from the major exporter.

MARKET SNAPSHOT AS OF 0530 GMT

S&P 500 Index Mini Futures: 7,760.00; up 0.02%; 1.75 points
DJIA Mini Futures: 52,468.00; down 0.21%; 111 points
Nikkei: 64,056.79; up 1.25%; 788.42 points
MSCI Asia, Ex-JP: 834.82; up 1.85%; 15.15 points
EUR/USD: $1.1119; down 0.05%; 0.0006 point
GBP/USD: $1.3292; down 0.11%; 0.0015 point
USD/JPY: 157.81 yen; down 0.09%; 0.14 point
Spot Gold: $4,034.22; down 0.58%; $23.58
U.S. Crude: $101.37; up 1.47%; $1.47
Brent Crude: $115.53; up 1.45%; $1.65
10-Yr U.S. Treasury Yield: 5.0238%; up 0.031 point
10-Yr Bund Yield: 3.3624%; up 0.007 point

GLOBAL TOP NEWS

Prime Minister **Benjamin Netanyahu** and rival **Gadi Eisenkot** offered competing claims to lead Israel after Tuesday's election, with Netanyahu calling for a right-wing government and Eisenkot saying voters had rejected the longtime Israeli leader, even as exit polls left their blocs deadlocked.

South Korean chipmaker **SK Hynix** said it would return about $75 billion to shareholders this year, after reporting a more than seven-fold jump in quarterly profit as AI infrastructure demand continues to drive up memory chip prices.

British finance minister **John Healey** is set to announce a cautious budget plan as he tries to avoid piling more bond market pressure on the new government of Prime Minister **Andy Burnham**.

EUROPEAN COMPANY NEWS

Standard Chartered hiked its income and profitability targets after third-quarter profit handily beat estimates with robust performances from its wealth and global markets divisions.

Syngenta's advisers are targeting a valuation of at least $66 billion in the Swiss-Chinese agrochemicals group's planned Hong Kong listing, which is likely to take place early next year, two people familiar with the matter told Reuters.

Rio Tinto's board has proposed increasing its CEO **Simon Trott**'s target remuneration package by 56% to £9.8 million, according to four people familiar with the matter and documents reviewed by Reuters.

TODAY'S COMPANY ANNOUNCEMENTS

06:00 **BASF SE** Q3 2026 Earnings Release
06:00 **BNP Paribas SA** Q3 2026 Earnings Release
06:00 **Mercedes-Benz Group AG** Q3 2026 Earnings Release
06:00 **Straumann Holding AG** Q3 2026 Earnings Release
06:30 **Kone Oyj** Q3 2026 Earnings Release
06:30 **SSAB AB** Q3 2026 Earnings Release
07:00 **Fortum Oyj** Q3 2026 Earnings Release
07:00 **GSK plc** Q3 2026 Earnings Release
07:00 **KONE Oyj** Q3 2026 Earnings Press Conference
07:00 **Mercedes-Benz Group AG** Q3 2026 Earnings Call
07:00 **Stellantis NV Q3** 2026 Earnings Release
07:30 **BASF SE** Q3 2026 Earnings Call
07:30 **UPM-Kymmene Oyj** Q3 2026 Earnings Release
07:30 **Valmet Corp** Q3 2026 Earnings Call
07:41 **Aena SME SA** Q3 2026 Earnings Release
08:00 **Equinor ASA** Q3 2026 Earnings Press Conference
08:00 **Standard Chartered PLC** Q3 2026 Earnings Call
08:00 **Telenor ASA** Q3 2026 Earnings Call
08:00 **UBS Group AG** Q3 2026 Earnings Call
08:15 **Mercedes-Benz Group AG** Q3 2026 Earnings Press Conference (German)
08:30 **KONE Oyj** Q3 2026 Earnings Call
08:30 **SSAB AB (publ)** Q3 2026 Earnings Call
09:00 **Banco Santander S.A.** Q3 2026 Earnings Call

09:00 **Dassault Systemes SE** Q3 2026 Earnings Presentation
09:00 **Endesa SA** Q3 2026 Earnings Release
09:00 **Fortum Oyj** Q3 2026 Earnings Call
09:30 **Straumann Holding AG** Q3 2026 Earnings Call
10:00 **Deutsche Bank AG** Q3 2026 Earnings Call
10:00 **KGHM Polska Miedz SA** Extraordinary Shareholders Meeting
10:00 **Orion Oyj** Q3 2026 Earnings Release
10:30 **Epiroc AB** Q3 2026 Earnings Release
10:30 **Mapfre SA** Q3 2026 Earnings Call
11:00 **Banco Santander S.A.** Q3 2026 Earnings Press Conference
11:00 **Jyske Bank A/S** Q3 2026 Earnings Call
11:00 **Zabka Group SA** Q3 2026 Earnings Call
11:15 **UPM-Kymmene Oyj** Q3 2026 Earnings Call
12:00 **Aena SME SA** Q3 2026 Earnings Call
12:00 **Epiroc AB** Q3 2026 Earnings Call
12:00 **GSK plc** Q3 2026 Earnings Call
12:00 **Koninklijke KPN NV** Q3 2026 Earnings Call
12:00 **Orion Oyj** Q3 2026 Earnings Call
12:00 **Stellantis N.V.** Q3 2026 Earnings Call
13:00 **BNP Paribas SA** Q3 2026 Earnings Call
13:30 **Dassault Systemes SE** Q3 2026 Earnings Call
14:00 **ASM International NV** Q3 2026 Earnings Call
17:00 **Banco Comercial Portugues** SA Q3 2026 Earnings Press Conference
18:30 **Airbus SE** Q3 2026 Earnings Call

ECONOMIC EVENTS (All times GMT)
07:00 Germany **GfK/NIM Consumer Sentiment** for Nov: Expected -30.9; Prior -30.6
11:00 France **Unemployment Class-A SA** for Sept: Prior 3,081.7k

DEBT AUCTIONS
Germany - Reopening of 10-year government bond auction

PICTURE OF THE DAY



Firefighters work at the site of a Russian drone strike, amid Russia's attack on Ukraine, in Kharkiv, Ukraine, October 28. REUTERS/Vitalii Hnidyi