



End of Day Summary – 4/29/2026

Intraday News • April 29, 2026

Edited by Kristen Radosh

US Treasuries

- 10s closed on Wednesday at 4.41
- April's range has been: 4.225/4.43
- Range for the last two weeks has been: 4.225/4.43

- 1st daily support is 4.44/4.45 **50%** to hold
- 1st weekly support at 4.36/4.38 **50%** to hold
- 2nd weekly support at 4.43/4.45 **60%** to hold

- 1st daily resistance is 4.325/4.33
- 1st weekly resistance at 4.225/4.24 **90%** to hold
- 2nd weekly resistance at 4.09/4.11

Bloomberg: [Powell Says He'll Stay at Fed for 'Period' of Time' After Term as Chair Ends](#)

Intraday Commentary From Jim Bianco

Bloomberg: [Fed Chair Pick Kevin Warsh Wins Key Senate Committee Vote](#)

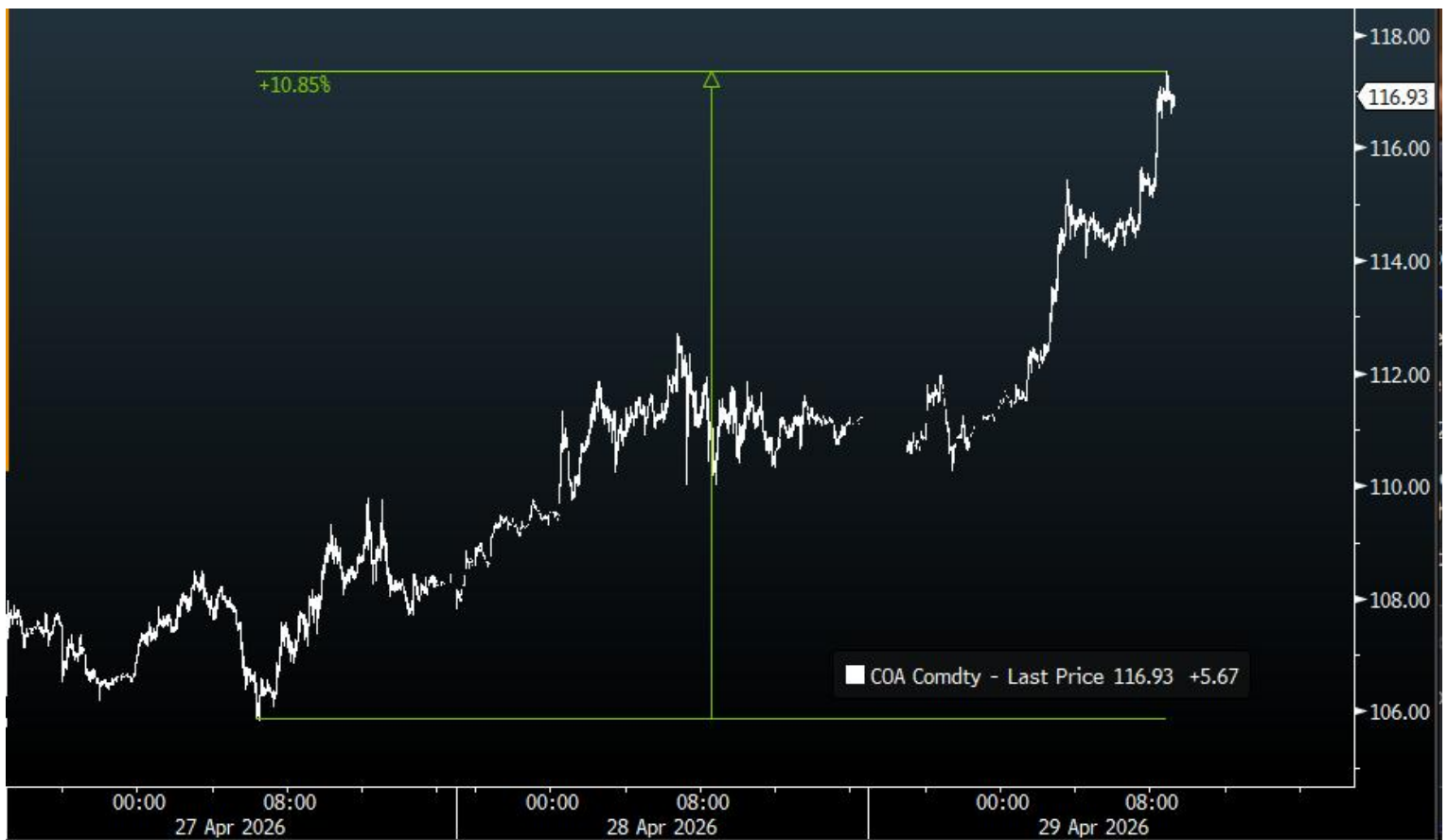
This is the Senate Banking Committee voting to advance Warsh's nomination to the full Senate for confirmation with a recommendation to confirm. Their recommendation comes from a majority of the members voting yes. So this is not the final vote, but the next step in the process.

There is just one example Of a nominee advancing from the Senate Banking Committee and not getting confirmed. Judy Shelton in 2021.

But that was unique, as Republican senators who were going to vote for her got COVID and were barred from the Senate floor. She failed 47-50. Otherwise, she would have been 50/50 with VP Pence breaking the tie.

So, unless something prevents a bunch of Republicans from getting to the Senate floor to vote for Warsh, he is a done deal.

Brent Crude Oil is up almost 11% since Monday's low and back to ~\$117.



The 10-year yield touched 4.40% a few minutes ago. With Trump announcing that the blockade will continue, we are stuck in a kind of Cold War scenario.

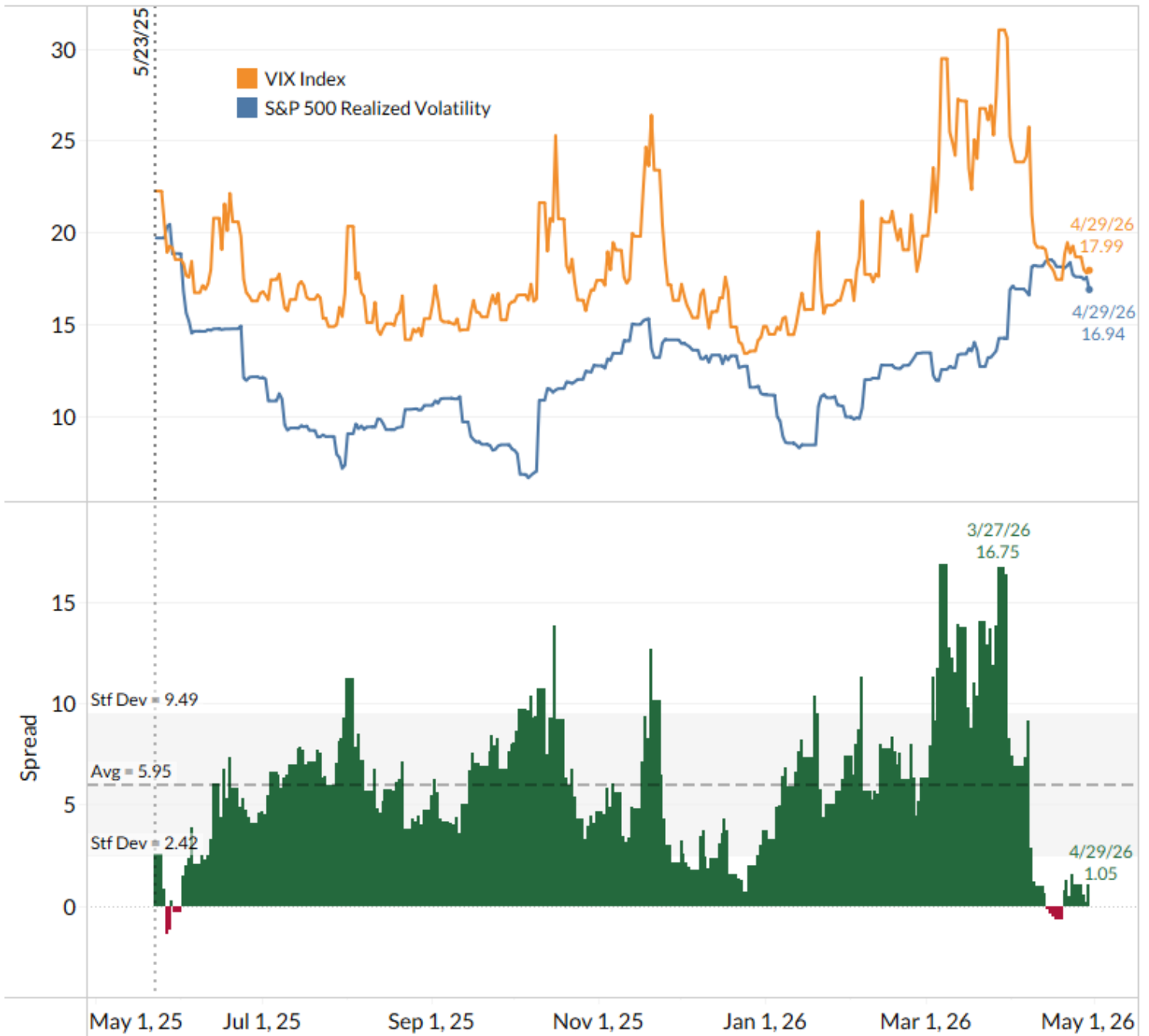
No War (so shooting); No Peace; No Shipping; No Crude Oil, LNG, Fertilizer, and Helium. In other words, nothing is happening, which means oil is still not flowing and the squeeze is growing and prices are trending higher.

Orange is the VIX - the market expectation for volatility (or risk) over the NEXT 30 days. Blue is realized volatility - what volatility (or risk) has been over the LAST 30 days. The bottom panel is the difference.

On March 27, when Dated Brent was above \$140, the spread was high (big green bars), indicating higher risk, so the VIX (NEXT 30 days) was trading at a big premium to realized (the LAST 30 days). Now that the spread is effectively zero, meaning the stock market sees no "extra risk" over the next 30 days.

Restated: Crude up \$10 in 48 hours. The 10-year yield is now 4.40%. No resolution to the war is apparent. The stock market ... nothing to see here.

Realized S&P 500 Volatility and the VIX



Source: Bloomberg

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*BRENT CRUDE RISES ABOVE \$119.50/BBL, HIGHEST SINCE JUNE 2022

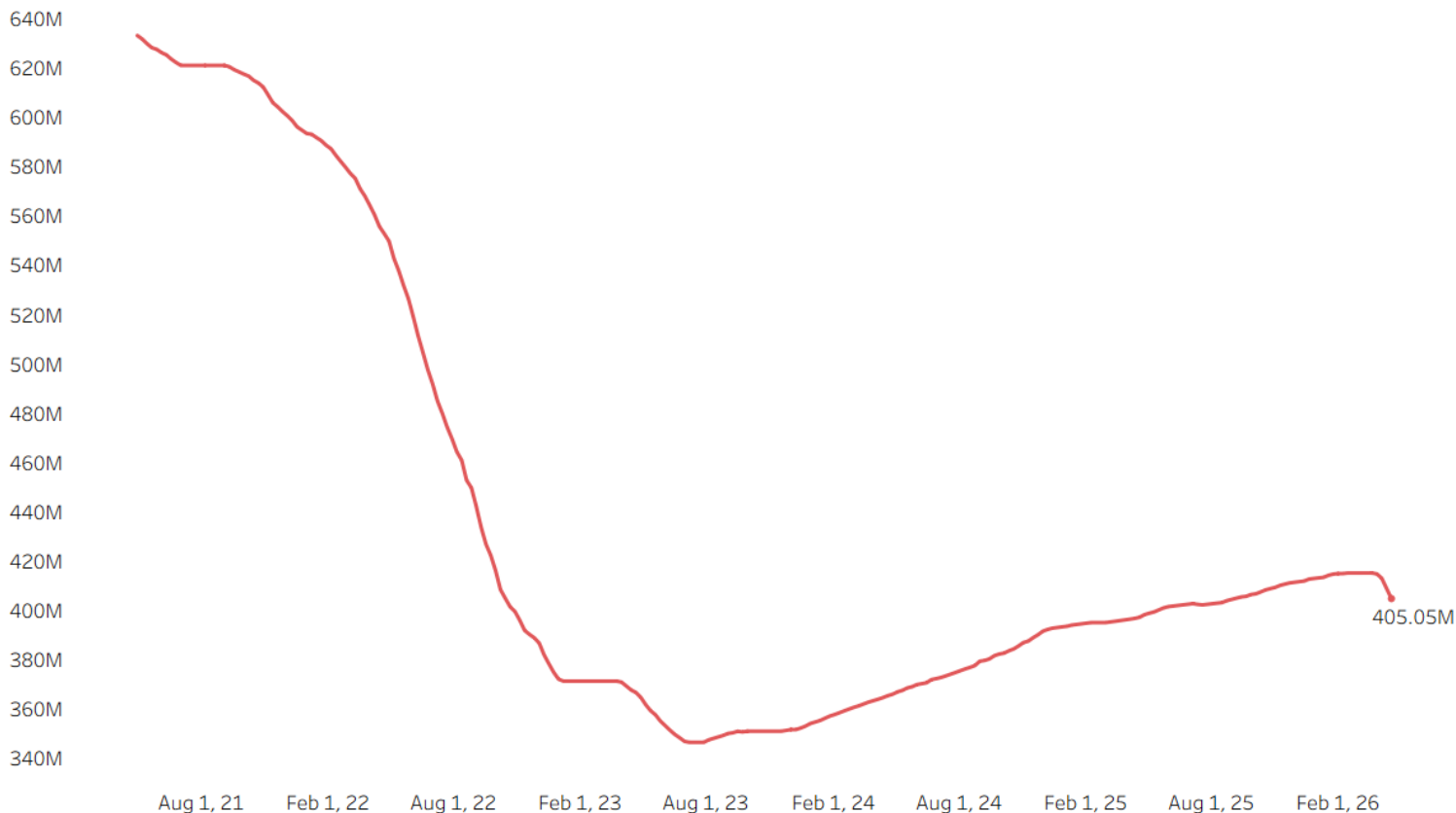
In the News

SupplyChainBrain: [Surge in Diesel Prices Tightens U.S. Trucking Capacity](#)

ZeroHedge: [US Oil Exports Soar To New Record High As Inventories Tumble, SPR Drained Most Since October 2022](#)

To hear more on this topic, tune in to our [Arbor Data Science Podcast: SPR: A Behind the Scenes Weapon](#)

U.S. Strategic Petroleum Reserve Inventory
 Friday level of barrels of oil from 4/30/2021 to 4/17/2026



Data Source: Bloomberg, U.S. Department of Energy

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Upcoming US Treasury Supply

Issue		Announced	Amount	Auction Date	Settle	Last Auction & Amount
3-Year Note		Wed 5/06		Mon 5/11	Fri 5/15	\$58 billion (4/07/2026)
10-Year Note		Wed 5/06		Tues 5/12	Fri 5/15	\$39 billion (4/08/2026)
30-Year Bond		Wed 5/06		Wed 5/13	Fri 5/15	\$22 billion (4/09/2026)
10-year TIPS	R T	Thurs 5/14		Thurs 5/21	Fri 5/29	\$19 billion (3/19/2026)

Upcoming Economic Releases & Fed Speak

- 4/18/2026 - 4/30/2026: **Fed's External Communications Blackout**
 - 4/30/2026 at 08:30am EST: Personal Income / Personal Spending / Real Personal Spending
 - 4/30/2026 at 08:30am EST: PCE Price Index MoM & YoY / Core PCE Price Index MoM & YoY
 - 4/30/2026 at 08:30am EST: Initial Jobless Claims / Initial Claims 4-Wk Moving Avg
 - 4/30/2026 at 08:30am EST: Continuing Claims
 - 4/30/2026 at 08:30am EST: Employment Cost Index
 - 4/30/2026 at 08:30am EST: GDP Annualized QoQ / GDP Price Index
 - 4/30/2026 at 08:30am EST: Personal Consumption / Core PCE Price Index QoQ
 - 4/30/2026 at 09:45am EST: MNI Chicago PMI
 - 4/30/2026 at 10:00am EST: Leading Index
 - 5/01/2026 at 09:45am EST: S&P Global US Manufacturing PMI
 - 5/01/2026 at 10:00am EST: ISM Manufacturing / Prices Paid / New Orders / Employment
 - 5/01/2026: Wards Total Vehicle Sales
 - 5/04/2026 at 10:00am EST: Factory Orders / Ex Trans
 - 5/04/2026 at 10:00am EST: Durable Goods Orders / Ex Transportation
 - 5/04/2026 at 10:00am EST: Cap Goods Orders Nondef Ex Air / Cap Goods Ship Nondef Ex Air
 - 5/04/2026 at 12:50pm EST: **Fed's Williams Delivers Keynote Remarks**
 - 5/05/2026 at 08:30am EST: Trade Balance/ Imports Mom / Exports MoM
 - 5/05/2026 at 09:45am EST: S&P Global US Services PMI / S&P US Composite PMI
 - 5/05/2026 at 10:00am EST: Census Releases February and March New Home Sales
 - 5/05/2026 at 10:00am EST: ISM Services Index / ISM Services Prices Paid
 - 5/05/2026 at 10:00am EST: New Home Sales / ISM Services New Orders
 - 5/05/2026 at 10:00am EST: ISM Services Employment / JOLTS Job Openings
 - 5/05/2026 at 10:00am EST: JOLTS Job Openings Rate / JOLTS Quits Rate / JOLTS Quits Rate
 - 5/05/2026 at 10:00am EST: JOLTS Layoffs Level / JOLTS Layoffs Rate
 - 5/05/2026: Building Permits / Building Permits MoM
 - 5/06/2026 at 07:00am EST: MBA Mortgage Applications
 - 5/06/2026 at 08:15am EST: ADP Employment Change
 - 5/06/2026 at 08:30am EST: **US Treasury Quarterly Refunding Announcement**
 - 5/06/2026 at 09:30am EST: **Fed's Musalem Speaks at Mississippi Bankers Association**
 - 5/06/2026 at 01:00pm EST: **Fed's Goolsbee Speaks on Panel Event**
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Upcoming Earnings Releases for Thursday, April 30, 2026

Noteworthy Before-the-Open Earnings Releases

Company	Symbol	Earnings estimate
A.O. Smith	AOS	\$0.95 per share
ADT	ADT	0.21
Air Products and Chemicals	APD	3.06
Albany International	AIN	0.52
Alnylam Pharmaceuticals	ALNY	0.90
Altria	MO	1.25
Ametek	AME	1.90
APi Group	APG	0.30
ArcelorMittal	MT	0.69
ATI	ATI	0.88
Axalta Coating Systems	AXTA	0.50
Baxter International	BAX	0.32
Belden	BDC	1.70
Bristol-Myers	BMY	1.42
Broadridge Financial	BR	2.60
Brunswick	BC	0.46
Builders FirstSource	BLDR	0.38
California Water	CWT	0.22
Cardinal Health	CAH	2.80
Carrier Global	CARR	0.51
Caterpillar	CAT	4.65

CCC Intelligent Solutions	CCC	0.09
Check Point Software	CHKP	2.40
Choice Hotels	CHH	1.31
CNH Industrial	CNH	0.00
CNX Resources	CNX	0.90
ConocoPhillips	COP	1.67
CRH	CRH	-0.22
Cross	CROX	2.77
Cullen/Frost	CFR	2.48
Darling Ingredients	DAR	0.57
DT Midstream	DTM	1.14
DTE Energy	DTE	2.01
Eli Lilly	LLY	6.88
Entegris	ENTG	0.75
Fortive	FTV	0.64
Frontdoor	FTDR	0.68
FTI Consulting	FCN	2.07
Garrett Motion	GTX	0.42
Gildan Activewear	GIL	0.35
Granite Constr	GVA	-0.77
Group 1 Auto	GPI	8.82
Hershey Foods	HSY	2.04

Hilton Grand Vacations	HGV	0.56
Hubbell	HUBB	3.87
Hyatt Hotels	H	0.57
IdaCorp	IDA	1.08
Illinois Tool Works	ITW	2.57
Insperty	NSP	1.23
Integer Holdings	ITGR	1.19
Intercontinental Exchange	ICE	2.23
InterDigital	IDCC	1.71
International Paper	IP	0.14
Iron Mountain	IRM	1.39
Jones Lang LaSalle	JLL	3.01
Kimco Realty	KIM	0.45
Kirby	KEX	1.39
L3Harris	LHX	2.53
Labcorp Holdings	LH	4.11
Laureate Education	LAUR	-0.24
Lincoln Electric	LECO	2.43
LKQ	LKQ	0.67
Martin Marietta	MLM	1.84
Mastercard	MA	4.41

Merck	MRK	-1.47
Molson Coors Brewing	TAP	0.37
Newmark Group	NMRK	0.27
NNN REIT	NNN	0.86
NovoCure	NVCR	-0.51
Option Care Health	OPCH	0.37
Parker-Hannifin	PH	7.84
Patrick Industries	PATK	1.05
PBF Energy	PBF	-0.74
PHINIA	PHIN	1.13
Quanta Services	PWR	2.04
Royal Caribbean	RCL	3.22
Saia	SAIA	1.82
Sirius XM	SIRI	0.71
Smurfit Westrock	SW	0.40
Sonic Automotive	SAH	1.40
Southern Company	SO	1.21
Stagwell	STGW	0.17
SunCoke Energy	SXC	0.07
T. Rowe Price	TROW	2.35
TechnipFMC	FTI	0.57

Tenet Healthcare	THC	4.17
Textron	TXT	1.30
The Cigna Group	CI	7.60
Trane	TT	2.53
Trimas	TRS	0.19
TriNet Group	TNET	1.84
Trinity Industries	TRN	0.28
Upbound Group	UPBD	1.07
Valero Energy	VLO	3.15
Vistance Networks	VISN	0.22
Wayfair	W	0.28
Wealthfront	WLTH	0.12
Wesco	WCC	2.84
Willis Towers Watson	WTW	3.66
Xcel Energy	XEL	0.91
Xerox	XRX	-0.27
XPO	XPO	0.88

Noteworthy After-the-Close Earnings Releases

Company	Symbol	Earnings estimate
Agnico-Eagle Mines	AEM	\$3.27 per share
Alignment Healthcare	ALHC	0.01
Alliant Energy	LNT	0.80
American International	AIG	1.89
Amgen	AMGN	4.77
Apple	AAPL	1.95
AptarGroup	ATR	1.15
Arcosa	ACA	0.45
Ardelyx	ARDX	-0.13
Arthur J. Gallagher	AJG	4.43
Atlassian	TEAM	1.33
Axos Financial	AX	2.17
Beazer Homes	BZH	-0.72
Bio-Rad Labs	BIO	1.97
Boston Beer Company	SAM	1.96
Camden Property	CPT	1.67
Casella Waste	CWST	0.17
Clorox	CLX	1.55
CNO Financial	CNO	0.94
Cohu	COHU	0.03
Columbia Sportswear	COLM	0.35
CubeSmart	CUBE	0.63

Dexcom	DXCM	0.47
Diamondrock Hospitality	DRH	0.18
Dolby Labs	DLB	1.33
Eastman Chemical	EMN	1.06
Encompass Health	EHC	1.49
Exponent	EXPO	0.57
Federated Hermes	FHI	1.19
First Solar	FSLR	3.03
Five9	FIVN	0.68
Floor & Decor	FND	0.41
Gemini Space Station	GEMI	-1.02
GoDaddy	GDDY	1.52
Grand Canyon Education	LOPE	2.78
Grid Dynamics	GDYN	0.08
Healthcare Realty	HR	0.39
Huntsman	HUN	-0.20
Illumina	ILMN	1.05
Ingram Micro Holding	INGM	0.72
iRhythm	IRTC	-0.66
LendingTree	TREE	1.47
LPL Financial	LPLA	5.48

MasTec	MTZ	0.99
Merit Medical	MMSI	0.83
Minerals Technologies	MTX	1.25
Monolithic Power	MPWR	4.90
NMI Holdings	NMIH	1.23
Pacira BioSciences	PCRX	0.55
Park Hotels & Resorts	PK	0.39
Quaker Chemical	KWR	1.62
Reddit	RDDT	0.57
ResMed	RMD	2.80
Rivian Automotive	RIVN	-0.63
Roblox	RBLX	-0.41
Roku	ROKU	0.33
Ryan Specialty Group	RYAN	0.43
Ryman Hospitality	RHP	2.02
Sandisk	SNDK	14.43
Schneider National	SNDR	0.10
Select Medical	SEM	0.46
Sinclair Broadcast	SBGI	-0.90
SPS Commerce	SPSC	0.98

SPX Technologies	SPXC	1.56
Stryker	SYK	2.98
Tanger Factory	SKT	0.58
Trupanion	TRUP	0.08
Twilio	TWLO	1.27
Universal Display	OLED	1.16
Warrior Met Coal	HCC	1.46
Western Digital	WDC	2.38
Weyerhaeuser	WY	0.05
Zeta Global	ZETA	0.11
