Coffee & Commentary

November 9, 2026

Good Morning!

Welcome to Coffee & Commentary, presented by Alpha Zero's CEO and CIO, Eric Mechler CFP®, ChFC®, AIF®, BFA™, RICP®.

Let's get started.

1. What is currently impacting financial markets?

- Stocks finished lower during a volatile week that included a post-election rally, a sharp technology selloff, and a Friday rebound. Thursday brought the NASDAQ's biggest daily decline in 19 months, and although Friday's recovery trimmed losses the NASDAQ still recorded its fourth consecutive weekly decline. Final results on the week were; S&P 500 -2.7%, NASDAQ -3.4%, and the Dow -0.9%.
- Tuesday's midterm elections changed the political backdrop for the tech industry as Democrats won control of both the House and Senate and gained ground in state governments campaigning for more restrictions on data centers. Incoming Texas Governor Gina Hinojosa pledged to halt new construction, while congressional Democrats outlined proposals to protect households from higher electricity bills and require independent testing of advanced AI systems.
- Friday's employment report showed a stronger job market than economists expected, as employers added 165,000 jobs in October, compared with forecasts for just 65,000. The report increased expectations for another Federal Reserve rate hike, with post-report futures pointing towards an 80% probability of a quarter-point hike in December.

2. How are we to prepare and act?

- The election gave investors another reason to question how quickly the technology buildout can move forward, even if demand for the technology itself remains strong. When stock prices already reflect years of rapid growth, the timing matters, as a business can have customers lined up and funding in place but still face delays over where it can build, how much power it can use, and who pays for the added infrastructure. For now, there is a difference between investors lowering their expectations and companies actually changing their plans. The concern becomes more meaningful for the economy if that uncertainty begins holding up orders, construction, and the hiring that would normally come with them.
- Once those decisions start affecting suppliers and workers, the conversation reaches beyond what investors are willing to pay for a stock. That is why the strength in the latest employment report matters: it gives some reason to believe the economy can absorb a change in expectations without immediately losing its footing. Over the coming weeks, continued orders and expansion would suggest that companies are working through the uncertainty, while a wider pattern of delays would point to something more consequential.

3. Taking a look at the week ahead.

- Monday — No major reports
- Tuesday — CPI inflation
- Wednesday — Veterans Day
- Thursday — Weekly jobless claims
- Friday — PPI inflation

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As always, here at Alpha Zero we believe knowledge is power and look forward to helping you Think Beyond What's Next.

Please feel free to share this newsletter with friends and family, and we thank you in advance for any introductions you send our way.

Have a great week and please reach out to us with any questions.

Sincerely,

Eric Mechler, CFP®, ChFC®, AIF®, BFA™, RICP®
Founder, CEO & CIO
Alpha Zero
2500 N Military Trail, Suite 320
Boca Raton, FL 33431
Phone: (561) 576-2599

eric@alphazerowealth.com

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Alpha Zero
2500 N Military Trail, Suite 320, Boca Raton, FL 33431
Phone: (561) 576-2599
eric@alphazerowealth.com



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