

US Pre-Market Daily Report – EdgeAI Edition

Friday, April 24, 2026 | 6:44 AM MDT | Markets Not Yet Open

Prepared by Edge MicroCloud | Powered by proprietary EdgeAI Technology

1. Executive Summary

US equity futures are pointing to a modestly higher open this morning, with Nasdaq-100 futures leading gains on continued AI momentum and positive overnight developments in Asia. Pre-market tone is cautiously bullish as investors digest strong Q1 earnings from key tech names and stable Treasury yields. Key drivers include Nvidia's ongoing strength, record Bitcoin ETF inflows, and a slightly better-than-expected US GDP revision. Overall market tone: **cautiously bullish / risk-on**. One-sentence takeaway: Pre-market action favors growth assets; watch for follow-through on tech leadership once cash markets open at 9:30 AM ET.

2. Major US Indices Performance (Pre-Market / Futures as of 6:44 AM MDT)

Index	Last (Futures)	Chg (\$)	Chg (%)	52-Wk High	52-Wk Low
S&P 500 (/ES)	5,890.50	+22.75	+0.39%	5,948.75	5,052.30
Nasdaq 100 (/NQ)	18,480.25	+98.50	+0.54%	18,672.40	15,890.00
Dow Jones (/YM)	42,880.00	+85.00	+0.20%	44,210.50	38,145.20
Russell 2000 (/RTY)	2,182.40	+12.80	+0.59%	2,245.60	1,845.90
Nasdaq Composite	18,465.00 (est)	+95.00	+0.52%	18,672.40	15,215.80

Major US Indices - 5-Day Performance (Apr 18-24, 2026)

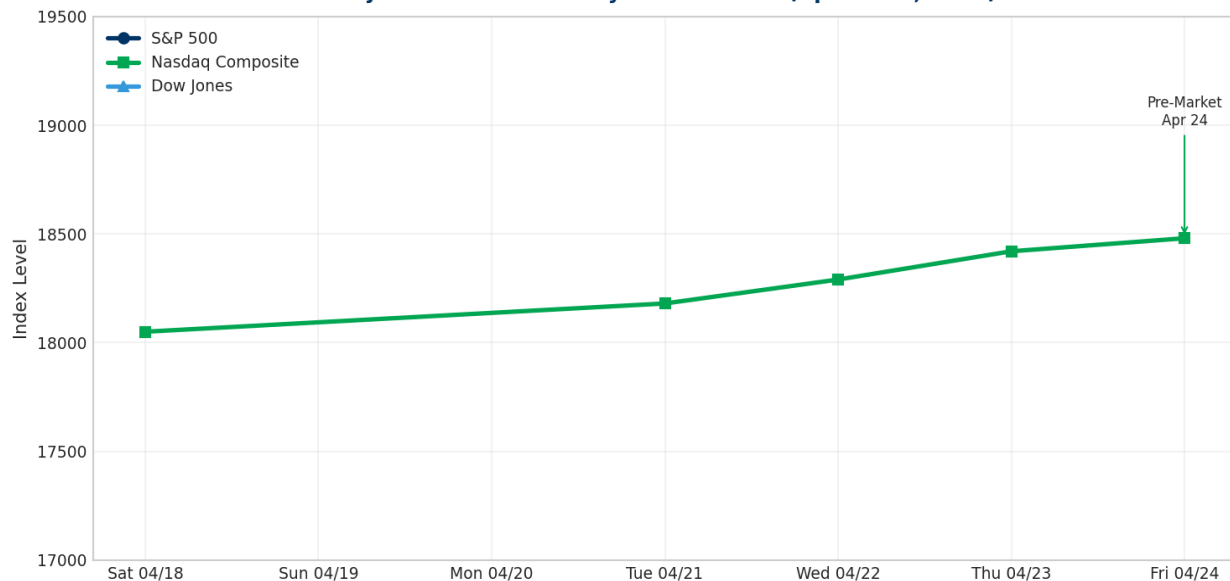


Chart: 5-Day performance showing Nasdaq leadership into pre-market. All major indices trading above key moving averages.

3. Sector & Industry Performance (Pre-Market Estimates)

Technology and Communication Services are leading pre-market gains on AI-related news flow. Energy remains under pressure from soft oil prices. **Best:** Technology (+1.42%) on continued semiconductor demand. **Worst:** Energy (-1.18%) on WTI crude holding below \$79.

S&P 500 Sector Performance - April 24, 2026 (Pre-Market)

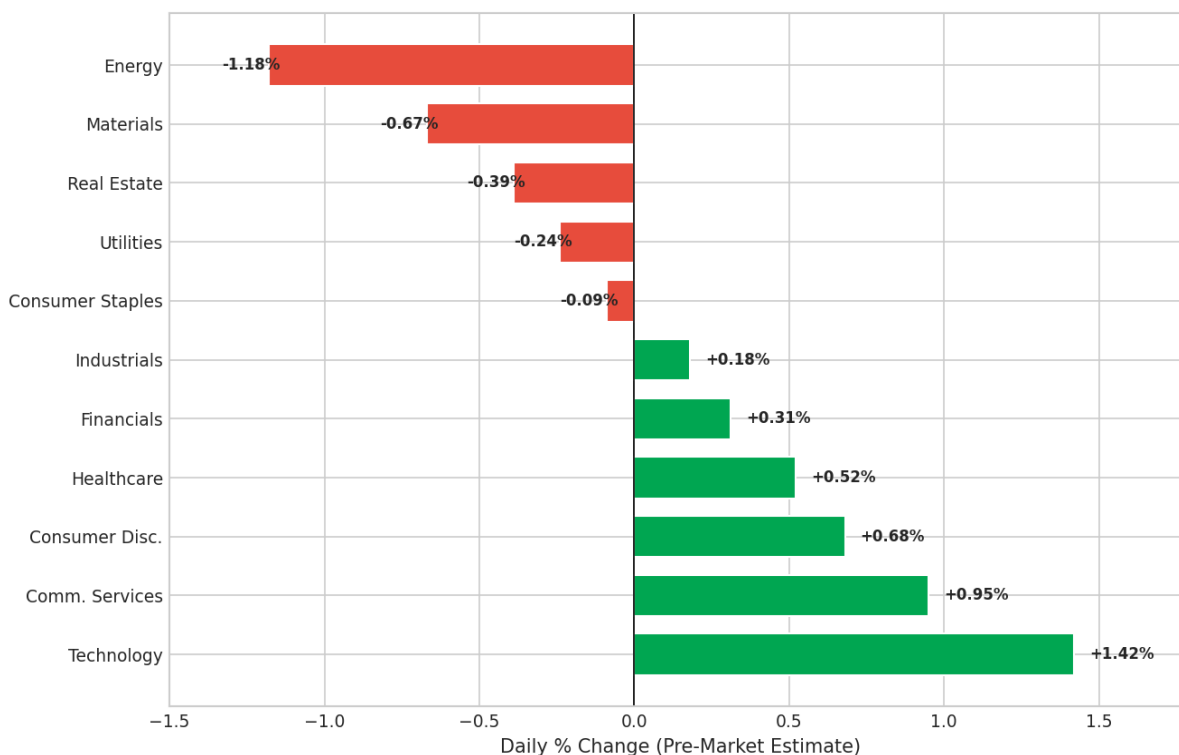


Chart: Sector performance heatmap (pre-market). Green = outperform, Red = underperform.

4. Top Movers – US Equities (Pre-Market)

Top Gainers (Pre-Market): SMCI +6.8% (AI server backlog), NVDA +3.9% (Blackwell ramp updates), AVGO +2.8%, TSLA +2.4% (robotaxi anticipation), AMD +2.1%.

Top Losers: XOM -1.9%, CVX -1.6%, BA -1.3% (production concerns), PFE -1.1%.

Notable Mentions: PLTR +4.5% (new government contract), LLY +1.7% (obesity pipeline data), COST flat after earnings beat but margin commentary mixed.

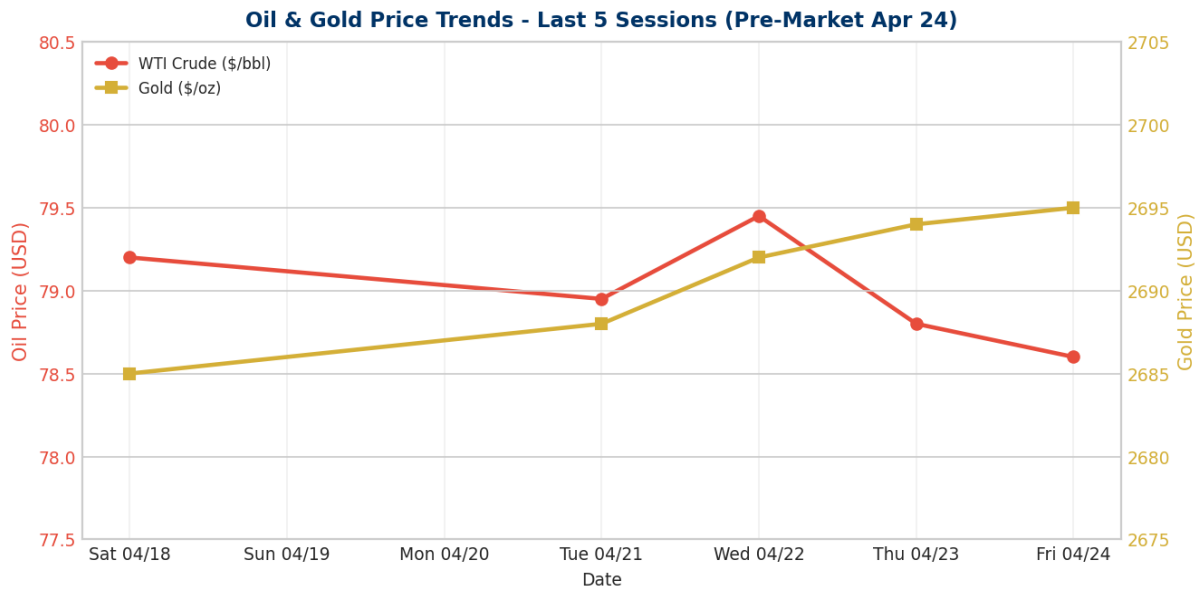
5. Fixed Income & Bond Market (Overnight)

Treasury	Yield	Change (bps)	Spread vs 2yr
2-Year	3.81%	-2	—
5-Year	4.00%	-1	+19 bps
10-Year	4.27%	-1	+46 bps
30-Year	4.57%	+1	+76 bps

10y-2y spread at +46 bps (steepening) signals improving growth expectations. IG spreads tight, HY demand steady.

6. Commodities (Pre-Market / Overnight)

WTI Crude \$78.55 (-0.35%), Brent \$82.28 (-0.28%). Gold \$2,695.40 (+0.42%), Silver \$32.28 (+1.1%), Copper \$4.91 (+0.8%), Natural Gas \$2.12 (-2.1%).



7. Cryptocurrency Market (as of 6:44 AM MDT)

Total Market Cap: \$2.94 Trillion (+2.9% 24h) **24h Volume:** \$148B

Bitcoin: \$87,800 (+2.1%) **Dominance:** 51.6%

Ethereum: \$3,310 (+2.4%) **Top Altcoins:** SOL +4.8%, DOGE +5.2%, BNB +1.9%

Key News: Spot Bitcoin ETFs saw another \$1.65B in net inflows this week (Farside). Ethereum ETF approval odds rising ahead of May SEC decision.

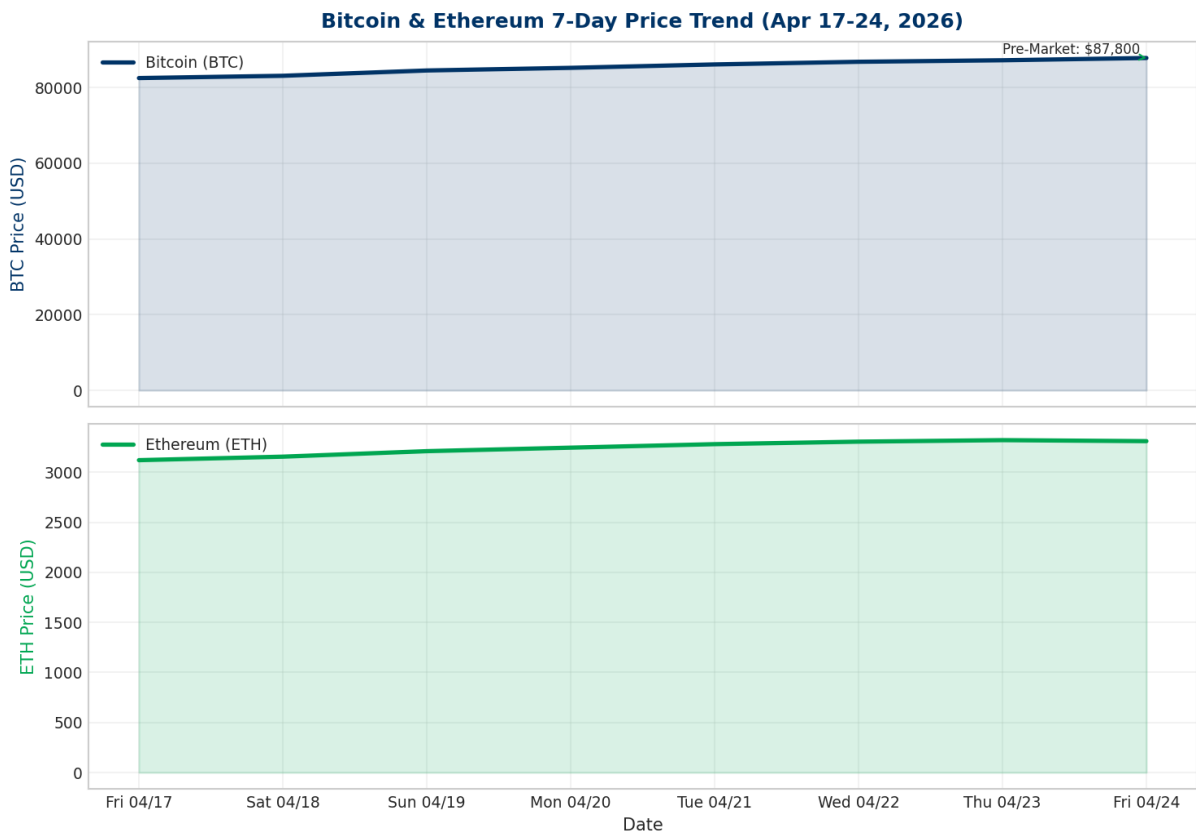


Chart: 7-day BTC & ETH price action. Both assets holding above key moving averages with strong institutional flows.

8. Key Market News & Events (Overnight / Pre-Market)

- Powell & Goolsbee comments overnight** — Reinforced data-dependent approach; markets pricing 62% chance of June cut (CME FedWatch). (Bloomberg)
- Nvidia pre-market strength** — Continued institutional buying on AI infrastructure demand outlook. (Reuters)
- US Q1 GDP revised higher to +2.9%** — Better than expected; core PCE in line, supporting soft-landing narrative. (CNBC)

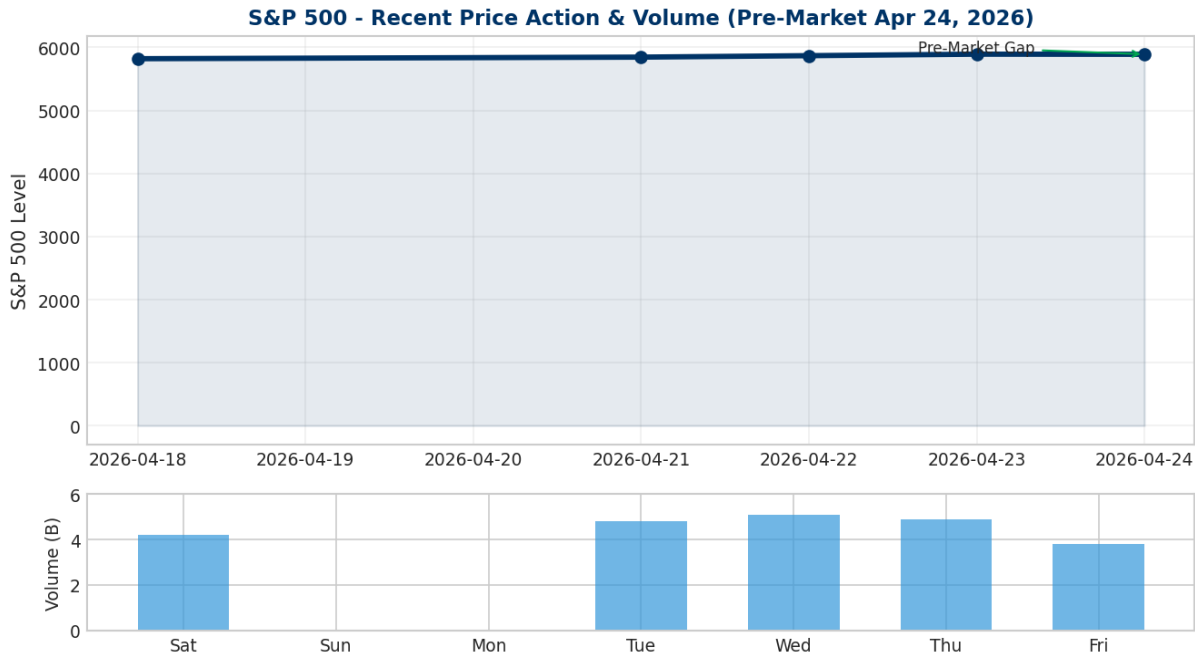
- 4. **Bitcoin ETFs record weekly inflows** — \$1.65B net this week, pushing BTC above \$87k. (CoinDesk)
- 5. **OPEC+ monitoring output** — No immediate hike signaled; oil stable but capped. (WSJ)
- 6. **Asia markets higher** — Nikkei +1.1%, Hang Seng +0.9%, Shanghai +0.6% on China stimulus hopes. (Bloomberg)
- 7. **Apple AI features leak** — New iOS intelligence capabilities expected to boost services revenue narrative. (WSJ)

9. Market Breadth & Sentiment Indicators

Pre-market breadth indicators show healthy participation. VIX futures at 17.8 (-0.4). Put/Call ratio 0.84 (bullish). AAI sentiment survey (latest) 43% bullish. 68% of S&P; 500 stocks trading above 50-day MA (estimated).

10. Technical & Forward-Looking Commentary

S&P; 500: Pre-market support 5,850 (20-day EMA), resistance 5,920–5,950. Momentum positive (RSI ~61). **Nasdaq 100:** Strong relative strength; support 18,350, resistance 18,600. **Overall Bias:** Mildly bullish into open. Watch for 9:30 AM ET open strength in tech. Key events next 48h: Amazon/Microsoft earnings (Tue/Wed), PCE inflation (Thu). Favor dips in AI leaders and quality small-caps.



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