# MARKET SUMMARY

Complete Recap of Today's Market Activity

## Saved By "The Outages"

**Market Summary:** Wednesday, November 18, 2026 - 12:00AM

Ever since the FAA ground stop and Microsoft outage at the end of last week, markets have been on high alert for additional tech-related outages. Whether it's due to that vigilance or an actual uptick in underlying problems, today's news cycle was happy to oblige the concern. The most notable development was a data system outage at the NSA. Separately, there were other outages reported by Apple and Microsoft. There was also an alert put out by the FBI regarding AI-related exploit vulnerability. All of the above (but mostly the NSA stuff) caused stocks to swoon. Bonds benefited from a very modest flight to safety which helped Treasuries and MBS turn green around 10:30am ET. After that, trading was fairly uneventful into the close.

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|---|---|---|
| 10:00 AM | DAY AHEAD | Strong Retail Sales Only a Mild Inconvenience For Bonds |
| 3:45 PM | | Mortgage Rates Move Modestly Lower |

### Econ Data / Events

- Retail Sales Control Group
  - 0.6 vs 0.4 f'cast
  - last month revised up by 0.4%

### Market Movement Recap

10:58 AM Quick intraday rally on reports that NSA communication system is down. Bonds turned positive and S&P is near multi-month lows.




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