QUOTES OF THE DAY

Thu Oct 29, 2026

Window **12:00 AM - 11:59 PM ET**
Screened **16** · Eligible **14** · Ranked **10**
Categories **4**

#	SCORE	SPEAKER	QUOTE / TIME ET / VENUE	CONTEXT	AFFECTS	VERIF.	SRC
1	**19** 5/5/4/5	**Lip-Bu Tan** CEO, Intel TECH/AI	**"I'm disappointed that we were not able to meet strong customer demand in this quarter. ... We face near-term challenges, including manufacturing supply shortages, the unprecedented memory crunch, and the resulting softness in PC demand."** After 4:00 PM (earnings call) · Intel Q3 2026 earnings call	Guidance reset: Q4 rev guide $15-16B and EPS 25c vs $17.1B and 43c expected (LSEG). Memory crunch hits PC demand.	**INTC, AMD, ARM, QCOM, MU, NVDA, AVGO, ASML, SMH, NDX**	2+ OUTLETS	1,2,3
2	**19** 5/4/5/5	**Christine Lagarde** President, European Central Bank ECONOMY/MARKETS/FED	**"If you combine these two factors – actually, the Governing Council debated whether a hike was appropriate ... And as I said, unless there was a major development, the direction of travel is quite clear for all of us."** 9:45 AM (press conference) · ECB monetary policy press conference, Frankfurt	Hike signal: ECB held the deposit rate at 2.50%, unanimous, but debated a hike. Euro-area inflation 3.8%. December is live.	**EUR, Bunds, OATs, BTPs, Euro Stoxx banks, ECB OIS**	PRIMARY	4,5
3	**19** 5/4/5/5	**Andy Jassy** CEO, Amazon TECH/AI	**"We still expect 2026 cash CapEx of approximately $220 billion, the majority for AWS, and expect to spend meaningfully more in 2027 with a clear line of sight to attractive financial returns"** After 4:00 PM (earnings call) · Amazon Q3 2026 earnings release and call	Capex vs free cash flow: AWS +39.3% to $46.0B, backlog $578B, but trailing FCF swung to a $42.4B outflow.	**AMZN, NVDA, AVGO, MU, utilities and power, hyperscaler capex complex, NDX**	2+ OUTLETS	6,7,8
4	**19** 5/5/5/4	**Christine Lagarde** President, European Central Bank ECONOMY/MARKETS/FED	**"I have just informed my colleagues that I will step down as @ECB President on 7 February 2027. ... I don't think that I can remain neutral."** 6:03 AM (X post), press conference from 9:45 AM · X post and ECB press conference, Frankfurt	Central-bank succession: early exit, term ran to October 2027. Successor race opens with French yields near 5%.	**EUR, Bunds, OAT-Bund spread, European banks**	PRIMARY	9,10,11
5	**16** 5/3/5/3	**Vladimir Putin** President, Russia POLITICS/GEOPOLITICS	**"First of all, we are ready – but we do not want any war with Europe. ... And if it goes too far, there will be no winners at all – let no one forget that."** 2:00 PM (Kremlin time stamp) · Kremlin, answers to journalists	Escalation risk: warning to Europe on rearmament, with a Baltic shipping line that echoes Hormuz.	**European defense (RHM, BA.), Brent, Baltic shipping, EUR, RUB**	PRIMARY	12,13
6	**15** 5/3/4/3	**Dave Ricks** CEO, Eli Lilly BUSINESS/CEOS	**"we are in the middle of the largest new category expansion in the history of the pharmaceutical industry. And Lilly's leading that."** Morning (earnings call) · Eli Lilly Q3 2026 earnings call	Category expansion: GLP-1 obesity demand drives revenue $24.4B (+39%), FY guide $91-92B.	**LLY, NVO, XLV, obesity-drug supply chain**	2+ OUTLETS	14,15,16
7	**15** 5/2/5/3	**Donald Trump** President of the United States ECONOMY/MARKETS/FED	**"The numbers came out way, way, way above expectation. Oh, you haven't seen anything yet. ... they hate like hell to cut the interest rates"** Before 2:00 PM (rally) · Rally, Rock Hill, South Carolina	Fed pressure: brags on Q3 GDP of 3.4% (BEA) a day after the Fed held at 3.75-4.00%.	**UST 2y, fed funds futures, DXY, XLF**	2+ OUTLETS	17,18,19
8	**15** 4/4/4/3	**Ursula von der Leyen** President, European Commission POLITICS/GEOPOLITICS	**"And tomorrow, @EU_Commission will put forward a proposal to allocate the remaining €45 billion of the Ukraine Support Loan for 2027 defence needs and budget support."** 12:25 PM (X post) · X post	Fiscal backstop: EU funding Ukraine's 2027 defense and budget gap, issued as EU debt.	**EU bonds, European defense, UAH, EUR**	PRIMARY	20
9	**14** 4/3/4/3	**Sam Altman** CEO, OpenAI TECH/AI	**"I think the invisible hand is failing right now."** Released Oct 29 (podcast) · Cheeky Pint podcast (episode released Oct 29, recorded earlier)	Supply shortage: compute and memory scarcity he says markets are not clearing.	**MU, SK Hynix, Samsung, NVDA, MSFT, data-center power**	PRIMARY	21,22
10	**13** 4/3/3/3	**Joe Creed** CEO, Caterpillar BUSINESS/CEOS	**"we're now taking some large reciprocating orders as far out as 2029 and turbine orders into 2030."** Morning (earnings call) · Caterpillar Q3 2026 earnings call	Capacity bottleneck: backlog $78B (+96%) from data-center power gear, capacity is the pacing factor.	**CAT, GEV, VRT, power-gen and data-center power names**	2+ OUTLETS	23,24

Score axes P/N/R/M = Speaker power / Novelty / Reach / Market relevance, 1-5 each. Ties: market, then power, then novelty, then earlier time.

SOURCES

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