

# Morgan's bearish outlook on the light module



## Overview

- Analysts remain divided: 19 "Buy" ratings vs. Morgan Stanley's bearish \$92 price target (17% downside from current price). - Sector faces triple risks: China slowdown, geopolitical trade barriers, and valuation divergence amid AI-driven overcapacity. Morgan Research expects the S&P 500 to close near 6,000 by year-end, supported by double-digit earnings growth. EM growth is forecast to slow to a 2.4% annualized rate in the second half of 2025, and EM central banks will likely continue cutting rates despite the Fed staying on hold. In light of this, The Morgan Stanley Institute delivers integrated insights on the defining questions for financial decision makers. JP Morgan's Marko Kolanovic lost his job earlier this year as the head of the investment bank's equity strategy team, following two years of bad calls. The move follows a disastrous two-year stretch of stock-market predictions by J.



## Article Content

JP Morgan maintains bearish dollar outlook as growth

JP Morgan is sticking to its bearish view on the U.S. dollar, arguing that a combination of moderating U.S. growth, robust global policy support, and

Lululemon Stock Records Worst Drop In A Year After ...

Shares of Lululemon Athletica Inc. (LULU) closed 14.2% lower on Friday, their worst fall in a year after the company's weak outlook prompted price target cuts from several Wall Street

POET Stock Is Lighting Up — But These 3 AI Optics Plays

Peers including AAOI, LITE, and LWLG have already benefited from large optical-networking orders and multibillion-dollar infrastructure deals.

FOREX: J.P. Morgan On Bearish USD Backdrop

J.P. Morgan: "Outlook: It is (probably) premature to mention recession, but that US exceptionalism is moderating should be undisputed. Further moderation would be USD bearish and push us towards

Morgan Stanley's Downgrade of Lam Research and Its Implications

Conclusion Morgan Stanley's downgrade of Lam Research is a cautionary note in an otherwise optimistic sector. While the firm's bearish outlook reflects valid concerns about growth

Morgan Stanley Bullish On U.S. Assets Bearish On U.S.

Morgan Stanley has shifted to a bullish outlook on key U.S. assets. The firm, however, maintains a bearish stance on the U.S. dollar.

Lamps / Lights

Morgan Lamps / Lights for sale including driving lamp, clear lens, fluted lens, stainless steel, mount, and stoneguards.

JP Morgan's bearish call on stocks turns bullish. However ...

Both Morgan Stanley and JP Morgan (the largest investment bank in America) have had to bite the bullet, and both are now predicting a rise in equities next year.

J.P.Morgan tweaks its bearish Rivian stock outlook after Uber deal

The firm reset its Rivian forecast after its \$1.25 billion deal with Uber.

Morgan Stanley Turns Bearish on EM Currencies on China Risks

Morgan Stanley is returning to a bearish view on emerging-market currencies, citing concerns over China's growth risks that not only weigh on the yuan but also further pressure a weak

Fog Light Wiring

Originally Posted by MontegueSome images that better show the light output and colour hue of the Marchal LEDs. Just to conclude, if you're using Morgan's embedded auxiliary lights loom and run 2 x

Kinder Morgan Stock Outlook: Is Wall Street Bullish or Bearish?

Kinder Morgan has underperformed the broader market over the past year, yet Wall Street analysts remain moderately bullish about the stock's prospects.

Earnings call: Lumentum Holdings exceeds Q1 FY2025 guidance

Bearish Highlights The Industrial Tech segment witnessed a significant year-over-year decline of 38%. GAAP net loss per share was reported at \$1.21. R& D investments and ramping up

Solar Rising, Grid Struggling: J.P. Morgan's 2025

Looking At The Whole Picture Every year, J.P. Morgan publishes its Annual Energy Paper, with the 15th edition released in March 2025 titled

Mid-year market outlook 2025 | J.P. Morgan Research

EM growth is forecast to slow to a 2.4% annualized rate in the second half of 2025, and EM central banks will likely continue cutting rates despite the Fed staying on hold. In light of fading U.S.

UK's Morgan Advanced Materials falls on bleak outlook

\*\* Shares of Morgan Advanced Materials Plc MGAM fall as much as 14% to 220p, their lowest since November 2023 \*\* Stock top pct loser on FTSE 250 MCX index \*\* The semiconductor

Morgan Stanley Stock Outlook: Is Wall Street Bullish or Bearish?

Despite Morgan's outperformance relative to the broader S& P 500 Index over the past year, Wall Street analysts maintain a cautiously optimistic outlook about the stock's prospects.

JP Morgan stays bearish on the Japanese yen amid higher energy prices

As such, JP Morgan continues to hold a more bearish view on the currency in the medium-term. The firm notes that: "We think that higher energy prices amid heightened Middle East

JPMorgan says crypto faces downside risk as bitcoin and ether futures ...

JPMorgan analysts say a lack of positive catalysts and fading momentum drive lower demand for bitcoin and ether futures.

Thoughts on the Market Podcast

Listen to our financial podcast, featuring perspectives from leaders within Morgan Stanley and their perspectives on the forces shaping markets today.

Smothering Heights | J.P. Morgan Asset Management

In this year's Outlook we focus on four medium term risks: US power generation constraints, China scaling the moat on its own, Taiwan and a "metaverse

One of Wall Street's biggest bears is turning upbeat on

While Lakos-Bujas didn't update his firm's year-end S& P 500 price target of 4,200, which implies a steep 27% decline from current levels, he did

Stock-Market Outlook: Morgan Stanley Bear Downbeat Despite 2023

Stocks performed far better than Morgan Stanley's bearish CIO Mike Wilson was expecting in 2023 - but that hasn't made him any more optimistic.

Market Outlook: C3AI (AI) Faces Bearish Sentiment Amid Light Opt

AI, Financial) Faces Bearish Sentiment Amid Light Options Trading Key Takeaways  
C3AI (AI) shares have seen a minor decline amid subdued trading activity. The company's implied

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Morgan Solar | Innovate Solar Solutions Today

Morgan Solar leverages big data to deliver solar asset optimization and to quantify major loss factors. We fully characterize the performance of new technologies,

Why Morgan Stanley's Wilson Is Bearish on Stocks in 2024

Morgan Stanley Chief US Equity Strategist and CIO Mike Wilson discusses his outlook for stocks in 2024 with Lisa Abramowicz on "Bloomberg The Open."

Turn Signal Module

Glad you put the last paragraph in as I was getting worried with all the potential flashing light indications ☐☐. I think 14 seconds indicator duration will do me fine, it is just the auto cancel as you coast up to a

2026 Market Outlook | J.P. Morgan Global Research

All things considered, J.P. Morgan Global Research sees a resilient global growth outlook for 2026 thanks to factors including front-loaded fiscal

US Dollar's Reign Challenged: J.P. Morgan Forecasts EM Currency ...

J.P. Morgan Research has issued a compelling and detailed bearish outlook on the US dollar, forecasting a continued period of weakness through 2025 and potentially into 2026.

## Contact Us

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