

KIMKJ.COM DAILY BRIEFING

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Wednesday, September 2, 2026

AI, Economy, and Global Conflict Daily Briefing

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Global AI News Briefing

Global AI News Briefing **2026-09-02**

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Top 5 Highlights of the Day

1. Tim Cook stepped down as Apple CEO after 15 years. His successor is John Ternus, head of hardware. Cook will remain chairman of the board and handle external relations.
2. The U.S. Department of Defense added OpenAI ChatGPT Gov and xAI Grok to its secure AI gateway, GenAI.mil. Following Google Gemini, it is now a three-model system. Anthropic Claude was excluded because of a supply chain dispute.
3. Nvidia bought \$3.5 billion in convertible bonds issued by Taiwan's MediaTek. Alphabet also participated, bringing the total issuance to \$3.9 billion. MediaTek is linking custom chips to Nvidia racks.
4. OpenAI ChatGPT's advertising revenue has surpassed an annualized \$1 billion. That came 200 days after the U.S. pilot launch. The company also opened access for advertisers in India, Europe, the Middle East, and North Africa.
5. OpenAI has bought tens of thousands of Mac minis and Mac Studios. The purpose is to train AI that can operate computers on real operating systems. Apple moved up its lineup refresh and released new products on August 25.

AI Technology Shifts

OpenAI has bought tens of thousands of Mac minis and Mac Studios over the past few months. The Information reported this on August 31. The machines are set up like servers without screens or keyboards, and they are used to train AI that looks at screens and clicks like a human. This training uses a great deal of memory and limited parallel processing, which fits Apple chips well. Anthropic is taking the same path by renting Mac minis through Amazon Web Services.

On August 31, Google unveiled its time-series forecasting model TimesFM-3. Time-series forecasting means looking at past patterns to project what comes next. This model has 330 million parameters and can make forecasts without retraining on someone else's data. Upload a single table, and it forecasts sales volume, visitors, and promotions at the same time. It ranked first on all three evaluations: Gift-Eval, FEV-Bench, and Time. The weights have been uploaded to GitHub and Hugging Face, but commercial and operational use is restricted.

Administrative Oversight / Regulatory Review

On August 31, the U.S. Department of Defense added OpenAI ChatGPT Gov and xAI Grok to its secure AI gateway, GenAI.mil. The gateway first opened last year with Google Gemini. It is authorized to handle information that is not classified but is still sensitive, and 1.7 million of the department's 3 million personnel already use it. Unlike consumer products, the military version does not collect user data. Anthropic Claude was excluded this time because of a supply chain dispute with the Defense Department.

New Technology / Product Launches and Practical Uses

Anthropic upgraded Claude's computer-use tools. It now allows multiple actions to be chained together in a single call, so the same work can be completed with fewer calls. The new browser tool reads the structure of the screen instead of relying on screenshots, which lets it identify buttons and

input fields more accurately. Anthropic also opened a Skills API for uploading and managing custom skills, along with a File API that expands storage to 1 terabyte per organization.

Investment / Management Trends

Nvidia bought \$3.5 billion in convertible bonds issued by Taiwan's MediaTek, or about 4.9 trillion won. This is Nvidia's first direct investment in a Taiwanese fabless company. A fabless company designs chips without running its own factories. Alphabet also joined the total \$3.9 billion issuance. MediaTek has adopted NVLink Fusion, allowing customer-specific custom chips to connect into Nvidia rack-scale systems. In response to criticism over circular ownership, Jensen Huang said they are separate businesses.

OpenAI ChatGPT's advertising revenue has surpassed an annualized \$1 billion. That came 200 days after the U.S. pilot launch in February 2026. The ads are now displayed in more than 40 countries. On the same day, the company opened a self-serve portal for advertisers in India, Europe, the Middle East, and North Africa. OpenAI is targeting \$2.5 billion in ad revenue this year and is preparing for an initial public offering.

Tim Cook stepped down as Apple CEO on September 1. During his 15-year tenure, he increased revenue from \$108 billion to \$416 billion. His successor is John Ternus, the hardware chief who joined Apple in 2001. Cook will remain chairman of the board and manage relations with the Trump administration and the Chinese government.

Check on U.S. AI Trends

Technology: OpenAI bought tens of thousands of Mac minis and Mac Studios to train computer-use AI. Google unveiled the time-series forecasting model TimesFM-3.

Law and regulation: The Department of Defense added ChatGPT Gov and Grok to GenAI.mil and removed Claude.

Products and use cases: Claude refined its computer-use and browser tools and opened the Skills API.

Investment and management: OpenAI's advertising revenue exceeded an annualized \$1 billion, and Tim Cook stepped down, with John Ternus taking over Apple.

Check on China AI Trends

Investment and semiconductors: Nvidia bought \$3.5 billion in convertible bonds from Taiwan's MediaTek and expanded NVLink Fusion cooperation. That opened a path for Taiwanese fabless firms to connect customer-specific custom chips into Nvidia racks. The deal aligns with mainland China's push for chip self-reliance. As mainland companies expand design and production outside Nvidia, Taiwan is moving deeper into Nvidia's camp.

Today's AI Use Tip

Here is how to use Claude's new computer-use features for repetitive document work.

1. Turn on the browser tool and write, in one line, the site to process and the final goal.
2. Let it perform multiple actions at once, and it can complete the flow from login to form entry in one pass.
3. Upload frequently used procedures as skills and manage them on a board so you can call them again later as they are.
4. On settings screens where values are tied together, compare the before and after states and confirm that only the one value you intended to change has changed. If you skip this check, permissions and categories can be wiped out all at once.

Commentary by Attorney Kim Kyung-jin

Today's developments point in one direction. We are moving from an era of renting intelligence to an era of buying and owning the machines behind it. OpenAI's purchase of tens of thousands of Macs, and Apple's decision to move up its lineup refresh, signal that shift.

The Defense Department's decision to exclude Claude also has a practical implication. Adoption is determined not only by performance, but also by supply chains and policy relationships. Companies choosing AI tools should review contract and regulatory risk together if they want to reduce the cost of switching later.

[Source Links]

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China AI, Robotics and Semiconductors In-Depth Briefing

China AI, Robotics and Semiconductors In-Depth Briefing 2026-09-02

Wednesday, September 2, 2026

Today's Top 5

1. Alibaba unveiled Qwen3.8-Flash-Next, offering an early preview of the architecture behind the next-generation Qwen4. Out of a total 125 billion parameters in a mixture-of-experts (MoE) structure, only 6 billion are used per token. Training cost is one-ninth that of Qwen3.7-Plus.
2. Nvidia invested \$3.5 billion in convertible bonds from Taiwan's MediaTek. This is Nvidia's first direct investment in a Taiwanese fabless chip designer. The move expands the custom AI chip ecosystem through NVLink Fusion.
3. Tencent released Hy4 preview 770B under the Apache 2.0 license. In internal blind evaluations, it outperformed GLM-5.3 and Kimi K3.
4. The Trump-Xi summit in Washington on September 24 is 22 days away. AI is a central agenda item, and a US-China bilateral AI dialogue will be held beforehand in early September.
5. The US Department of Commerce plans to share a draft rule with industry within September that would block Chinese companies from remotely leasing GPUs at overseas data centers. Because the Remote Access Security Act (RASA) has not passed the Senate, its legal basis remains a point of contention.

Chinese AI Models and Platforms

■ Alibaba previews Qwen4 architecture with Qwen3.8-Flash-Next

Alibaba's Qwen team released Qwen3.8-Flash-Next as open weights on August 26. Out of a total 125 billion parameters in an MoE structure, only 6 billion are used per token. It also incorporates a 51-billion-parameter N-gram embedding table — essentially a dictionary of frequently used word groups stored as single units. Because it can be loaded into ordinary system memory rather than GPU memory, costs are reduced.

The default context window is 262,144 tokens, extendable to 1 million tokens with YaRN. Training cost is roughly one-ninth that of Qwen3.7-Plus. The Qwen team stated that this architecture forms the foundation for the next-generation Qwen4, and that it released the preview early so developers could prepare in advance.

The architecture preserves large-scale MoE performance while cutting active parameters per token to 6 billion. With training costs cut to one-ninth, small and medium-sized companies can now build custom models on the same architecture. China's AI ecosystem is thickening rapidly even below the top-tier models.

Impact for Korea: With only 6 billion active parameters, inference is possible on a single high-end GPU. Korean companies now have one more option when incorporating open-weight models into their own services.

(August 26, 2026, MarkTechPost, Hugging Face model card)

■ Tencent open-sources Hy4 preview 770B under Apache 2.0

Tencent released Hy4 preview on August 28 and made the weights public. It is an MoE structure using only 49 billion of its total 770 billion parameters per token. The context window exceeds 1 million tokens. Because the license is Apache 2.0, there are no restrictions on commercial use.

Inside Tencent, 163 experts blind-graded 203 tasks. The model scored 2.99 out of 4, higher than GLM-5.3 (2.92) and Kimi K3 (2.94). On the public benchmark BenchAlign, it ranked 6th among 228 models (79.87/100).

API pricing is 6 yuan per million input tokens and 18 yuan per million output tokens. It is available through Yuanbao, WorkBuddy, CodeBuddy, and OpenRouter.

This marks the first time Tencent has released a top-tier model under an Apache license. Alibaba (Qwen), Tencent (Hy4), Zhipu (GLM), and DeepSeek (V4) have all now entered the open-weight competition.

(August 28, 2026, Science and Technology Daily, TechNode, Tencent official)

■ DeepSeek releases V4-Flash-Vision-Exp weights under MIT license

DeepSeek uploaded the weights of its first multimodal experimental model to Hugging Face on September 1. It uses a 305-billion-parameter MoE structure under the MIT license. The API had already opened on August 21.

The model accepts image input (JPEG, PNG, GIF, WebP) and can perform text recognition on screenshots and chart analysis. It scored 36.5 on ApexBench and 27.3 on Agents' Last Exam, figures close to Opus 4.8 (39.4 and 25.7 respectively).

This marks DeepSeek's first step from a text-centric model toward multimodality. If visual understanding is combined with the low prices of the V4 line, its use in the agent market is likely to expand.

(Weights released September 1, 2026 / API released August 21, 2026, IT之家, Open Source For You)

■ DeepSeek nears close of \$7.4 billion funding round at \$74 billion valuation

DeepSeek is raising funds at a valuation of 50 billion yuan (approximately \$74 billion). The target raise is \$7.4 billion. Investors reportedly include the

National AI Fund, NetEase, JD.com, IDG Capital, and CATL. Reports indicate the round was expected to close by late August, was temporarily paused, and has since resumed.

The company is preparing for a 2027 listing on Shanghai's STAR Market. Annual recurring revenue (ARR) is estimated at \$500 million. Its valuation rose from 45 billion yuan at the first external funding round in June to the current 50 billion yuan. If the STAR Market listing succeeds, DeepSeek would follow Unitree as the next company in China's AI listing boom.

(August 29, 2026, Bloomberg, China Money Network)

■ Chinese open-source AI surpasses 60% of OpenRouter token share

According to Fortune, all of the top five models on OpenRouter in July were Chinese. Chinese models' token share surpassed 60%. DeepSeek ranked first at 16.3%, followed by Qwen at 13.9%. US models fell behind at 35.7%.

Even US companies such as DoorDash and Airbnb are using Chinese open models, which cost 60-90% less than closed US models. This price-driven approach is penetrating the US market. If US companies continue to rely on Chinese models, it complicates the direction of export controls.

(August 27, 2026, Fortune)

Robotics, Humanoids, and Embodied Intelligence

■ Nvidia's physical AI business hits \$10 billion annually, with Chinese robotics firms as key customers

The Wall Street Journal reported on Nvidia's physical AI business, which generates roughly \$10 billion in annual revenue. Jensen Huang expects it to grow to \$100 billion within a decade. Chinese robotics companies are relying heavily on Nvidia's chips and software.

Unitree's H2 Plus is scheduled for release in October. It follows Nvidia's Isaac GR00T reference design and is equipped with the Jetson Thor chip. It stands 1.8 meters tall, weighs 68 kg, and has 31 degrees of freedom. It will first be deployed to ETH Zurich and Stanford.

Impact for Korea: Nvidia's physical AI chips are not currently subject to export controls. If Chinese companies' use of these chips to train models for commercial robots becomes entrenched, the US could expand export controls to cover robotics chips as well.

(August 31, 2026, Wall Street Journal, PR Newswire)

■ AgiBot proceeds with Hong Kong IPO

AgiBot (智元机器人) began its Hong Kong IPO process on July 24. The target valuation is \$5.1-6.4 billion. It plans to sell 15-25% of its shares to raise more than \$1 billion. The lead underwriters are CITIC Securities, CICC, and Morgan Stanley.

Investors include Tencent, BYD, LG Electronics, and Mirae Asset. First-half shipments totaled 8,400 units. The company is targeting a third-quarter listing. If it lists, China would have two publicly listed humanoid robot companies, following Unitree's STAR Market listing.

(July 24, 2026, TechNode, SCMP)

■ US FCC bans new imports of Chinese-made humanoid robots

Starting July 29, the US FCC blocked new imports of Chinese-made humanoid robots and robot dogs that lack sales authorization, citing cybersecurity and national security concerns. Previously authorized models are exempt.

The US Department of Defense has placed Unitree on its list of companies linked to the Chinese military. This designation conflicts with the structure in which Unitree sells robots built with Nvidia technology in the US market.

Impact for Korea: This creates an opportunity for Korean robotics companies in the US market. However, if they use Chinese components or software, they

could face the same restrictions, making supply chain review necessary.

(Effective July 29, 2026, NBC News, Al Jazeera)

AI Semiconductors and Computing Infrastructure

■ Nvidia invests \$3.5 billion in MediaTek convertible bonds

Nvidia purchased \$3.5 billion worth of convertible bonds from Taiwan's MediaTek, marking its first direct investment in a Taiwanese fabless chip designer. Alphabet also participated, bringing the total issuance to \$3.9 billion.

MediaTek will adopt the NVLink Fusion platform, a structure in which customers design custom AI accelerators (XPUs) that connect directly to Nvidia racks. It bundles Fusion chiplets, NVLink-C2C, and NVHBM memory into a verified design kit.

MediaTek's stock rose 10% in Taipei the day after the announcement. Amid controversy over circular investment structures, Jensen Huang pushed back, saying the two companies' businesses are separate.

This opens a path for Chinese companies unable to use Nvidia GPUs to design NVLink-compatible chips through MediaTek. Whether export controls will extend to this pathway remains a variable.

Impact for Korea: If Samsung Electronics' and SK Hynix's HBM is incorporated into the NVHBM specification, demand routed through MediaTek could emerge. Conversely, if MediaTek becomes paired with Chinese-made HBM (CXMT), the standing of Korean memory companies could shift.

(August 31, 2026, NVIDIA Newsroom, Tom's Hardware, CNBC)

■ Huawei completes Ascend 950DT cloud deployment in August

Huawei deployed the Ascend 950DT to Huawei Cloud in August as planned, moving up its original fourth-quarter schedule. The chip delivers 2 PFLOPS at

FP8, 144GB of HBM, and 2TB/s interconnect bandwidth — 2.5 times faster than the 910C.

DeepSeek is an early adopter. The official V4 API ran on Huawei Ascend from day one, the result of Huawei and DeepSeek jointly preparing fused operators in the CANN software stack. Full commercial deployment begins in the fourth quarter.

If the 950DT operates smoothly, Chinese companies will be able to train top-tier models without Nvidia. TrendForce estimates that Huawei and Cambricon combined will hold 56% of China's advanced AI chip market in 2026.

(August 2026, TrendForce, Huawei Central)

■ SMIC raises wafer prices further in Q3

SMIC is raising wafer prices in the third quarter. Average selling prices already rose 5.7% in the second quarter. Q2 revenue reached \$3.01 billion, surpassing \$3 billion for the first time. Wafer shipments rose 14% quarter-on-quarter to 2.9 million units (8-inch equivalent), with a utilization rate of 93.7%.

Co-CEO Zhao Haijun said customer orders far exceeded early-year projections, driven by a surge in demand for AI-supporting chips. The company is adding 8,000 wafers per month to its 12-inch line. Trial production at 5nm is also underway, with mass production targeted for 2026.

(August 2026, Tom's Hardware, SCMP)

■ Cambricon's first-half revenue rises 108% to 6 billion yuan

Cambricon's first-half revenue reached 6 billion yuan, up 108% year-on-year. Net profit rose 123% to 2.31 billion yuan. In the first quarter alone, the company earned 2.88 billion yuan, roughly matching its entire first-half revenue from the prior year. Its annual target for 2026 is 13.5 billion yuan.

Combining its Siyuan 590 and 690 processors, the company plans to ship approximately 500,000 units in 2026. Its market capitalization stands at 443.4 billion yuan, making it China's largest AI chip company by market value.

Telecommunications, Networks, and Edge AI

■ China's three major telecom carriers accelerate shift to "token factories"

The AI transformation of China's three major telecom carriers is accelerating.

China Mobile's AIDC revenue jumped 486% year-on-year, with computing-resource revenue now accounting for 22.6% of the total. Cumulative computing capacity reached 112,700 PFLOPS, and the company has secured 7GW worth of AIDC contracts.

China Telecom generated 31.1 billion yuan in intelligent-services revenue, with its TianYi Cloud unit earning 61.8 billion yuan. Its proprietary intelligent computing capacity stands at 70.8 EFLOPS, operating 142 models and 420 industry-specific agents.

China Unicom unveiled a management model handling tokens across five stages: generation, transport, refinement, storage, and application. It operates 75 industry models and 150 agents.

GSMA assessed that Chinese carriers are the first in the world to adopt token-based pricing plans. A transition is underway in which traditional telecom revenue declines while AI revenue grows.

(H1 2026 earnings, SCMP, C114, GSMA Intelligence)

■ ZTE presents 6G evolution foundation with GigaMIMO

ZTE unveiled GigaMIMO at MWC Barcelona 2026, a technology that deeply integrates AI with wireless communications. It completed field verification with China Mobile. AI-coordinated scheduling improved perceived speeds for cell-edge users sixfold.

At MWC Shanghai, the company exhibited the world's first 256 TR U6G prototype. By co-designing massive MIMO with AI, spectral efficiency improved by more than 30%.

Impact for Korea: If China establishes AI-RAN standards first during the transition from 5G-A to 6G, Korea's telecom equipment industry could lose bargaining power.

(MWC Barcelona, March 2026 / MWC Shanghai, June 2026, ZTE official)

Policy, Regulation, and National Strategy

■ China's Ministry of Commerce discusses restricting overseas access to AI models

China's Ministry of Commerce held closed-door meetings with Alibaba, ByteDance, and Zhipu. On the agenda is a plan to block overseas users from accessing China's most advanced AI models.

Three directions are reportedly under discussion: restricting overseas transfer of core data used for model training, limiting downloads of model weights, and blocking overseas acquisition of strategic technologies such as autonomous AI agents. Cloud-based access to models would still be permitted. Nothing has been finalized; discussions remain ongoing.

If the US blocks chips while China blocks models, the result is restriction on both sides. If US companies are blocked from downloading DeepSeek and Qwen weights, it would be difficult for Chinese models to maintain their 60% share of OpenRouter tokens.

Impact for Korea: Korean companies using Chinese open models in their services face the risk of losing weight access. Since no rules have been finalized yet, this remains a situation to monitor.

(Discussions as of July 2026, SCMP, Sina Finance)

■ Exit-Entry Administration Regulation takes effect September 15 — 13 days away

The State Council's Exit-Entry Administration Regulation takes effect in 13 days. It includes provisions allowing exit bans on individuals who violate export controls or technology transfer rules, which could apply to key AI personnel. Exit bans of indefinite duration are also possible, decided by the Ministry of Commerce and the relevant State Council department.

This will make it harder for Chinese AI researchers to travel abroad. Combined with the AI partnerships signed with 28 countries at WAIC, this reflects a dual strategy of expanding international ties while preventing personnel outflow.

(Effective September 15, 2026, Ministry of Justice, SCMP)

■ US BIS aims to share cloud remote-access blocking rule within September

The US Bureau of Industry and Security (BIS) is drafting a rule to block Chinese companies from renting Nvidia GPUs at third-country data centers, such as those in Thailand and Singapore, and plans to share the draft with industry within September.

This is an attempt to fill the gap left after the Biden administration's AI diffusion rule was rescinded in May 2025. The House passed the Remote Access Security Act (RASA) 369-22, but the Senate has yet to act. If BIS issues the rule without RASA in place, legal challenges are expected.

If Chinese companies can neither buy chips nor rent them, their path to securing overseas computing power closes, deepening reliance on Huawei Ascend and Cambricon.

(August 29, 2026, TechTimes, Tom's Hardware)

US-China Tech Rivalry and Impact for Korea

■ Trump-Xi Washington summit set for September 24 — 22 days away

The summit is 22 days away. Trump has called AI "the biggest technology in history" and said the US must stay ahead. A US-China bilateral AI dialogue will be held beforehand in early September, with agenda items including frontier AI risk management and intellectual property protection.

Chinese state media reported that the US requested the dialogue first, pressured by China's momentum after signing partnerships with 28 countries at WAIC. Bill Gates has also urged US-China AI cooperation and announced plans to meet with Xi Jinping in November.

Impact for Korea: If the scope of AI chip export controls is adjusted, the conditions for Samsung Electronics' and SK Hynix's HBM exports to China could change.

(Scheduled for September 24, 2026, Fox News, Asia Times, CNBC)

■ Pax Silica alliance expands to 25 countries, including Korea

The US-led AI, semiconductor, and critical minerals supply chain alliance has grown to 25 signatory countries, with 35 countries participating in the AI Opportunity statement. Deputy Foreign Minister Kim Jin-ah attended the second Washington summit and presented Korea's semiconductor industry support strategy.

As countries such as Kazakhstan participate in both camps, a binary choice structure is becoming a practical reality.

(August 2026, Korea Herald, ITIF)

■ Nine indicted in Taiwan over smuggling of Nvidia B300 servers

Prosecutors in Keelung, Taiwan, indicted nine people on charges of diverting 74 Nvidia B300 servers to China. Those indicted include employees of Nvidia Taiwan and Supermicro. Paperwork falsely claimed that 130 units would remain in Taiwan, but 74 units were routed through Indonesia, Japan, and Hong Kong to China. Customs intercepted 56 units.

B300 servers reportedly sell in China for about twice the US price. Because Taiwan has no law directly penalizing AI hardware exports, the defendants were charged with breach of trust and document forgery. The smuggling routes involved five distinct methods, illustrating how tighter export controls also increase the profitability — and persistence — of circumvention schemes.

(August 24, 2026, Tom's Hardware, TechRepublic)

Attorney Kim Kyung-jin's Commentary

Ahead of the September 24 summit, the US and China are simultaneously tightening AI export controls on each other. The US targets chips and cloud remote access, while China targets model weights and key personnel.

Both sides face large gaps. Chinese open models already run on US company servers, and Nvidia B300 units continue slipping through Taiwanese customs into China. The pattern repeats: institutions try to block, and markets find a way around.

Korea stands in this gap. It is worth examining how long Korea can keep straddling both sides — selling HBM within the Pax Silica framework while relying on borrowed Chinese open models.

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World Economy Top 10

World Economy Top 10 2026-09-02

Coverage: 2026-09-01 05:30 KST - 2026-09-02 05:30 KST

Today's Top 10

1. Global government bonds sold off together and yields jumped to multi-year highs. The US 10-year Treasury yield hit 4.788 percent, the highest since January 2025, and the 30-year rose to 5.28 percent, while Japan's 10-year topped 3 percent for the first time since 1996, Germany's 10-year touched 3.364 percent, and the UK's 10-year touched 5.254 percent (as of the September 1 US close).

2. Renewed clashes between the US and Iran pushed up international oil prices. On September 1, Brent crude rose 0.87 percent to \$91.28 a barrel and WTI rose 0.94 percent to \$86.57, after a Saudi vessel and a tanker owned by a Korean shipping company were each struck in the Strait of Hormuz the previous night.

Korea impact: A tanker owned by a Korean shipping company was struck in the Strait of Hormuz, and the rise in oil prices pushes up the unit cost of crude oil Korea imports.

3. Eurozone consumer price inflation in August rose to 3.3 percent from 2.9 percent in July, the highest so far this year. Energy prices, up 14.3 percent from a year earlier, led the increase, while core inflation actually edged down slightly to 2.4 percent (Eurostat flash estimate, September 1).

4. US stocks closed lower on September 1. The S&P 500 fell 0.71 percent to 7,631.47, the Nasdaq fell 1.03 percent to 26,099.77, and the Dow fell 419.02 points to close at 52,766.88.

5. Expectations for a September Fed rate hike grew. According to the CME FedWatch tool, the probability of a 0.25-point hike at the September 15-16 meeting rose to about 66 percent, driven by Chair Warsh's hawkish remarks and the July PCE price index reading of 3.7 percent (as of August 31).
6. The US ISM Manufacturing PMI for August came in at 54.6, down 1 point from 55.6 in July. The sector extended its expansion streak to eight months, but the new orders index fell 3 points to 53.7 (released September 1).
7. Gold prices were weighed down by rate-hike expectations. As of 9:00 a.m. US Eastern time on September 1, spot gold traded at about \$4,350 an ounce, down from \$4,435 the previous day, and December silver futures opened at \$67.28 an ounce before retreating into the \$65 range.
8. US Treasury Secretary Bessent defended the government bond market. At the G20 finance ministers meeting on September 1, he said US Treasuries have been the best performer among major countries' bonds since President Trump took office, but the 10-year yield jumped to a 20-month high that same day.
9. Japan's Nikkei 225 closed down 1.97 percent at 65,096.63 on September 1. Rising global bond yields and expectations of central bank tightening weighed on risk asset sentiment.
10. Japan's 10-year government bond yield topped 3 percent for the first time since 1996. As the global bond sell-off spread to Japan, super-long-term yields rose in tandem (September 1).

Market Indicators

US stocks closed lower across all three indices on September 1: the S&P 500 at 7,631.47, the Nasdaq at 26,099.77, and the Dow at 52,766.88. The US 10-year Treasury yield stands at 4.788 percent and the 30-year at 5.28 percent. Japan's Nikkei 225 fell 1.97 percent to 65,096.63. Eurozone inflation in August stands at 3.3 percent.

Central Banks and Policy

The probability of a September Fed rate hike rose to about 66 percent according to FedWatch. Chair Warsh's hawkish remarks and the July PCE price index reading of 3.7 percent supported these expectations. Treasury Secretary Bessent defended the US Treasury market at the G20 meeting.

Commodities and Energy

Brent crude stands at \$91.28 a barrel and WTI at \$86.57. Renewed US-Iran clashes and the tanker attacks in the Strait of Hormuz pushed prices higher. Spot gold trades at about \$4,350 an ounce, and silver is in the \$65-67 range.

What to Watch in the Next 24 Hours

The US August jobs report is due out on September 4 local time. The OPEC+ Joint Ministerial Monitoring Committee review is scheduled for September 6. Watch for further increases in global bond yields and the situation regarding transit through the Strait of Hormuz.

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International Conflict Briefing

International Conflict Briefing **2026-09-02**

As of: 2026-09-01 09:20 KST - 2026-09-02 09:20 KST

Key Developments Today

1. In response to US airstrikes on Iranian facilities, Iran launched ballistic missiles toward Jordan and areas near US troop deployments.
2. Russian forces launched airstrikes on Kyiv and surrounding areas for six consecutive days, killing at least 12 people, including 6 railway workers.
3. The German government identified Russia as being behind the drone operation at Leipzig Airport and initiated new sanctions.
4. Israeli special operations and airstrikes in Gaza City killed 4 civilians, including 2 children.

Frontline Changes

- US-Iran Conflict: US forces conducted airstrikes on Iranian military facilities near the Strait of Hormuz. Iran announced that it had launched retaliation operations, firing ballistic missiles and drones toward Jordan.
- Ukrainian Front: Russian forces continued ballistic missile strikes on downtown Kyiv, surrounding residential areas, and railway facilities. President Zelenskyy warned that Russian airspace has become dangerous due to deep strikes by Ukrainian drones.
- Gaza Strip: Israeli forces conducted an operation in Gaza City to arrest Hamas security personnel. Clashes escalated as airstrikes were added during the operation.

Civilian Casualties and Humanitarian Situation

- A total of 12 people, including 6 railway workers, were killed and 21 injured in Russian missile attacks in Kyiv and its outskirts, Ukraine.
- Four civilians, including 2 children, lost their lives in airstrikes in Gaza City, Gaza Strip.
- As relief supply routes were destroyed, shortages of drinking water and medical supplies in the Gaza Strip worsened.

Diplomacy, Sanctions, and Military Support

- The German Foreign Office defined the attempted drone operation at Leipzig Airport as a Russian operation and imposed sanctions.
- The IAEA Director General warned of the potential leakage of undeclared nuclear material in Iran and urged access to Iranian nuclear facilities.
- The UN Secretary-General emphasized the restoration of multilateralism for resolving international conflicts at the Shanghai Cooperation Organization summit.

Key Watchpoints for the Next 24 Hours

- Whether navigation through the Strait of Hormuz will be suspended due to the expansion of US-Iran armed conflict
- The aftermath of deep strikes inside the Russian mainland by Ukrainian forces in response to continuous airstrikes on Kyiv
- Potential additional response at the European Union (EU) level following Germany's announcement of sanctions against Russia

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Global Incidents and Disasters Briefing

Global Incidents and Disasters Briefing 2026-09-02

Basis: 2026-09-01 07:40 KST - 2026-09-02 07:40 KST. 8 items.

Today's Summary

A major flood struck the Himalayan region along the Nepal-China border, killing more than 1,000 people and leaving thousands missing. In Spain, a record-breaking heat wave that persisted through summer killed more than 5,200 people. In the Democratic Republic of the Congo, cumulative Ebola infections surpassed 6,000, deepening an epidemic crisis.

Earthquakes and Volcanoes

1. Magnitude 5.6 earthquake off North Maluku, Indonesia

Occurred at 17:22 KST on September 1, 2026 (15:22 local time). A magnitude 5.6 earthquake struck waters southeast of Maba in North Maluku province, Indonesia. The focal depth was 10 kilometers. Cracks appeared in buildings and homes in nearby areas. Casualties are still being tallied. Indonesia's meteorological agency announced there is no tsunami risk and urged preparation for aftershocks.

Heavy Rain, Floods and Typhoons

2. Landslide and major flooding in the Nepal Himalayas

Figures were updated at 17:00 KST on September 1, 2026 (13:45 local time). Rock collapse triggered massive flooding in the mountainous area along the Nepal-China border. According to figures compiled by Nepali authorities and

China, the death toll is 1,066. The number of missing stands at 4,462. Eleven hydropower plants were destroyed. The Nepali government and international relief teams are conducting a joint search.

3. Flash flood in the Grand Canyon, United States

Reported at 06:40 KST on September 2, 2026 (14:40 local time on September 1). A flash flood swept through a canyon in Grand Canyon National Park, Arizona, United States. A group of hikers was swept away by the torrent. The U.S. National Park Service announced that 2 people died and 1 remains missing. Search authorities are using helicopters to look for the missing person.

Snowstorms, Cold Waves and Heat Waves

4. Record-breaking major heat wave in Spain and Western Europe

Reported at 07:16 KST on September 2, 2026 (23:16 local time on September 1). A persistent summer heat wave continued across Spain and Western Europe. According to the Spanish health research institute, 5,234 people have died. Most of the dead are people aged 65 and older. Spanish health authorities are maintaining a heat illness advisory and implementing protective measures for older residents.

Wildfires

5. Wildfire spreading near Yosemite National Park, United States

Reported at 07:33 KST on September 2, 2026 (15:33 local time on September 1). A wildfire broke out in Mariposa County near Yosemite National Park in California, United States. The fire spread close to a roadway, leading to the closure of Highway 140. According to firefighting authorities, containment stands at 0 percent. Local government has issued an emergency evacuation order for nearby residents.

Accidents

6. Major explosion at a firecracker factory in India

Reported at 04:19 KST on September 2, 2026 (00:49 local time on September 1). An explosion occurred at a firecracker factory in Kaushambi, Uttar Pradesh, India. The blast caused 5 nearby homes to collapse. According to local authorities, 11 people died and 5 were injured. Police and firefighters are searching the site and investigating the cause of the accident.

7. Collapse of a residential building in Kwara State, Nigeria

Reported at 04:34 KST on September 2, 2026 (20:34 local time on September 1). A residential building collapsed in Ilorin West, Kwara State, Nigeria. Residents were trapped in the debris. According to local authorities, 4 people died. Rescue teams are clearing the debris and continuing further search operations.

Infectious Diseases

8. Spread of Ebola and cholera in the Democratic Republic of the Congo

Reported at 05:33 KST on September 2, 2026 (21:33 local time on September 1). Ebola infections have spread across 6 provinces, including North Kivu, in the Democratic Republic of the Congo. According to health authorities, Ebola infections total 6,186 and deaths total 3,007. More than 41,000 cholera cases have also occurred. The World Health Organization and the United Nations are supplying medical goods and assisting with disease control.

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