

KIMKJ.COM DAILY BRIEFING

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Saturday, September 5, 2026

AI, Economy, and Global Conflict Daily Briefing

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Global AI News Briefing

Global AI News Briefing 2026-09-05

Saturday, September 05, 2026

Today's Top 5

1. ChatGPT, Claude, and Grok all went down at the same time
2. Google WeatherNext 3 learns directly from satellites and forecasts the weather every hour
3. Microsoft unveiled a dictation AI that costs 10 cents per hour
4. Meta Muse Spark 1.3 calls tools less and performs better
5. Adobe connected more than 70 tools, including Photoshop, to a Slack chatbot

Changes in AI Technology

1. Major AI services went down at the same time

On the morning of September 3, ChatGPT and Codex, Claude, and Grok all experienced access errors at nearly the same time. OpenAI detected a rise in errors at about 10:58 a.m. UTC and applied a mitigation in about 24 minutes. It is rare for services from several companies to stop at once. Some suspected a shared cloud outage or an attack, but there is no evidence that the incidents were connected. OpenAI unveiled GPT-6 Astra on the same day, but no evidence has emerged linking it to the outage.

Source: Bloomberg (2026-09-03)

2. Google WeatherNext 3 learns directly from satellite imagery

Google DeepMind unveiled WeatherNext 3, an AI weather forecasting model, on September 3. It learns directly from real-time imagery sent by geostationary satellites. This removes the six-hour data lag seen in earlier models. It updates forecasts every hour, and for some indicators it provides detail down to about 5 km. Google said precipitation forecast accuracy more than a day ahead improved by as much as 50%. The model will be integrated into Search, Maps, and Gemini, while enterprise data will be provided through BigQuery and Google Cloud.

Source: Google Official Blog (2026-09-03)

New Technologies/Product Launches and Practical Use Cases

3. Microsoft MAI-Transcribe-2, low-cost and fast dictation

Microsoft unveiled MAI-Transcribe-2, an AI that converts speech to text, on September 3. It ranked first on the FLEURS benchmark, which covers 60 languages, and posted an average error rate of 5.2%. Microsoft said it is up to 10 times faster than the competing model GPT-Transcribe. It supports speaker separation, word-level timestamps, and automatic language identification. Pricing is \$0.10 per hour of audio, and Microsoft will keep this discounted rate through the end of 2026. It is currently in public preview in Azure AI Speech.

Source: Microsoft AI (2026-09-03)

4. Meta Muse Spark 1.3 does more with less

Meta unveiled Muse Spark 1.3 on September 2. In coding and agent tasks, it reduced tool calls by about 20% and token usage by about 25% compared with the previous version. Its context window is 1 million tokens. Pricing is \$1.25 per 1 million input tokens and \$4.25 per 1 million output tokens. If users agree to provide training data, the prices fall sharply to \$0.10 and \$0.20. The currently available xhigh setting has an intelligence score of 61. The higher score highlighted by Meta was produced under a limited-release setting.

Source: VentureBeat (2026-09-02)

5. Adobe connected more than 70 tools, including Photoshop, to Slack

Adobe connected more than 70 tools, including Photoshop and Firefly, to a Slack chatbot on September 2. If a user describes the desired task in a Slack conversation, the chatbot calls the appropriate Adobe tool and handles it. It can turn conversation or Canvas content into PDFs, images, and videos. The feature is available to Slack Business+ and Enterprise+ users.

Source: TechCrunch (2026-09-02)

Investment/Management Trends

6. China's Moonshot AI prepares for a Hong Kong listing

Moonshot AI of China, the maker of the Kimi model, is preparing for a Hong Kong stock market listing. On September 3, it submitted a confidential preliminary filing to the Hong Kong Stock Exchange. On September 4, Bloomberg reported that the company aims to raise as much as \$5 billion this year. The company was valued at \$50 billion in an ongoing funding round. The lead underwriters are Goldman Sachs, China International Capital Corporation, and Deutsche Bank. Rival DeepSeek is valued at about \$74 billion, and Z.AI at about \$66 billion.

Source: Bloomberg (2026-09-04)

U.S. AI Trend Check

- Technology: ChatGPT, Claude, and Grok all experienced access disruptions on September 3 at nearly the same time. Google unveiled WeatherNext 3, a forecasting AI that learns directly from satellites.
- Products/Use Cases: Microsoft released the low-cost dictation model MAI-Transcribe-2. Meta introduced Muse Spark 1.3, and Adobe launched a bundle of tools that works inside Slack.

China AI Trend Check

- Investment/Management: Moonshot AI submitted a confidential preliminary listing filing to the Hong Kong Stock Exchange. Bloomberg reported that it aims to raise as much as \$5 billion this year.

Today's AI Use Case: Reducing a teacher's weekly prep work with chatbots

This is a method validated in U.S. education settings. Teachers can reduce preparation time by running prompts in the same sequence every week.

1. Use four or five prompts every week in the same order. Arrange them in the sequence of student feedback, next week's lesson plan, differentiated materials, and parent notice.
2. Include the grade level, subject, goal, class time, materials, and desired format in the prompt. Be specific, as in "a 40-minute fourth-grade fractions lesson plan."
3. Paste the curriculum standards that must be followed directly into the prompt. The chatbot does not separately know those standards.
4. Do not include student names, grades, or special education information. Free chatbots may use user input for training, so entering personal information can violate student privacy rules.
5. Treat the result as a draft. Final review and sign-off must be done by a person.

Attorney Kim Kyung-jin's Commentary

Yesterday, the AI systems of major companies stopped at the same time. If work depends on only one chatbot, an outage can bring the entire day's work to a halt. Damage can be reduced by deciding in advance on backup tools and manual procedures. Microsoft's new dictation model lowers the cost of transcription and meeting-minute preparation. However, audio containing

client information should not be uploaded to a public preview service. If such information is exposed, it can violate confidentiality obligations.

[Source Links]

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- Microsoft MAI-Transcribe-2: <https://microsoft.ai/news/mai-transcribe-2-is-the-fastest-most-accurate-and-cheapest-speech-recognition-model-in-the-world/>
- Meta Muse Spark 1.3: <https://venturebeat.com/technology/meta-says-muse-spark-1-3-has-frontier-performance-but-its-best-results-come-from-a-model-developers-cant-broadly-use-yet>
- Adobe Slack integration: <https://techcrunch.com/2026/09/02/adobe-is-making-its-tools-available-in-slack/>
- Moonshot AI Hong Kong IPO (\$5 billion report): <https://www.bloomberg.com/news/articles/2026-09-04/moonshot-is-said-to-seek-up-to-5-billion-in-hk-ipo-this-year>
- Moonshot AI confidential listing filing: <https://technode.com/2026/09/03/moonshot-ai-reportedly-submits-confidential-hong-kong-ipo-filing/>
- Guide to chatbot use for teachers: <https://www.structural-learning.com/post/chatgpt-teachers-practical-classroom-guide>

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China AI, Robotics and Semiconductors In-Depth Briefing

China AI, Robotics and Semiconductors In-Depth Briefing 2026-09-05

Saturday, September 5, 2026

Today's Top 5

1. DeepSeek is planning to order 160,000 Huawei Ascend 950DT chips for a data center in Inner Mongolia. This would be the largest known concentration of Chinese-made AI chips in a single site.
2. Moonshot AI has raised its Hong Kong listing fundraising target to as much as \$5 billion, based on a \$50 billion valuation, with Bank of America joining as an underwriter.
3. The "Robots on the Runway" event takes place today at IFA 2026 in Berlin. Of the 11 participants, more than 6 are Chinese companies including Unitree and AgiBot.
4. A security researcher has disclosed two Bluetooth vulnerabilities in the Unitree G1 robot. They allow an attacker within 30 meters to gain root-level privileges and spread to nearby robots. No fix had been released even during the IFA exhibition.
5. China's Exit and Entry Administration Regulation takes effect on September 15. It bars violators of export control and technology transfer rules from leaving the country, including AI personnel.

Chinese AI Models & Platforms

Moonshot AI Raises Hong Kong IPO Target to \$5 Billion

Bloomberg reported on September 4 that Moonshot AI is considering raising up to \$5 billion through a Hong Kong listing, up from an earlier target of \$3 billion. The company filed a confidential preliminary application (A1) with the Hong Kong Stock Exchange on September 3. Bank of America has joined as an underwriter, alongside existing underwriters CICC, Deutsche Bank, and Goldman Sachs.

Moonshot AI is valued at \$50 billion. Its flagship model, Kimi K3, has 2.8 trillion parameters, making it the largest open-weight model in the world. Ahead of the listing, the company converted its offshore entity into a mainland Chinese entity.

Chinese AI startups are accelerating toward public listings. DeepSeek is also preparing for a 2027 listing on Shanghai's STAR Market. Hong Kong is becoming the fundraising gateway for Chinese AI firms. The capital raised goes toward computing infrastructure and model development, narrowing the gap in capital strength between Chinese AI companies and their U.S. competitors.

For Korea: if models like Kimi K3 enter the market with Korean-language services, the domestic AI market landscape could shift.

(Reported 2026-09-04)

Bloomberg <https://www.bloomberg.com/news/articles/2026-09-04/moonshot-is-said-to-look-up-to-5-billion-in-hk-ipo-this-year>

TechNode <https://technode.com/2026/09/03/moonshot-ai-reportedly-submits-confidential-hong-kong-ipo-filing/>

Robotics, Humanoids & Embodied Intelligence

IFA 2026 "Robots on the Runway" Held Today in Berlin

IFA 2026 opened in Berlin on September 4. The first-ever "Robots on the Runway" event in IFA's history takes place today at 12:45 PM local time, featuring humanoid robots walking and dancing on stage to showcase their motion technology.

Of the 11 participants, more than 6 are Chinese companies, including Unitree, AgiBot, EngineAI, and Deep Robotics. Of IFA's roughly 1,900 total exhibitors, 932 are Chinese companies, nearly half.

AgiBot demonstrated calligraphy with its A3 model, writing with force-sensing hands while simultaneously mapping the facility. AgiBot began Hong Kong listing procedures in July, targeting a valuation of \$5.1 billion to \$6.4 billion, with first-half shipments exceeding 15,000 units.

The United States banned imports of Chinese-made humanoid robots on July 29. Europe currently has no such restrictions, and Chinese robotics companies are treating Europe as an alternative market. Korea also has no restrictions on Chinese robot imports, and should watch Europe's response to help set its own standards.

(2026-09-04 to 09-05)

IFA Berlin https://www.ifa-berlin.com/programme/robots_on_the_runway

Cryptopolitan <https://www.cryptopolitan.com/unitree-agibot-ifa-2026-robot-runway/>

TechTimes <https://www.techtimes.com/articles/326678/20260904/agibot-a3-writes-calligraphy-ifa-berlin-force-sensing-hands-that-also-map-facilities.htm>

Unitree G1 Bluetooth Hacking Vulnerabilities Disclosed During IFA Exhibition
Security researcher Olivier Laflamme disclosed two vulnerabilities, CVE-2026-76639 and CVE-2026-76640. Within a 30-meter Bluetooth range, an attacker can gain unauthenticated root-level administrator access.

An infected robot can automatically discover nearby Unitree devices and propagate to them using the same method, spreading without any user action.

Unitree exhibited its products at IFA while these vulnerabilities were already known. As of disclosure, no official firmware fix had been released. The company stated that an internal fix is underway.

Cybersecurity concerns were one basis for the U.S. import ban on Chinese-made robots. This vulnerability shows that concern was not unfounded. Korea

currently has no security standards for imported robots.

(Reported 2026-09-04)

TechTimes <https://www.techtimes.com/articles/326651/20260904/unitree-humanoid-robots-hacked-30-meters-eu-buyers-ifa-face-no-import-restriction.htm>

Security Affairs <https://securityaffairs.com/198085/hacking/hack-one-robot-reach-the-next-unitree-g1-security-flaws.html>

The Hacker News <https://thehackernews.com/2026/08/two-unitree-g1-edu-humanoid-robot-flaws.html>

AI Semiconductors & Computing Infrastructure

DeepSeek Plans to Deploy 160,000 Huawei Ascend 950DT Chips

Bloomberg reported on September 4 that DeepSeek plans to deploy more than 160,000 Huawei Ascend 950DT chips at a data center it is building in Ulanqab, Inner Mongolia. This would be the largest known concentration of Chinese-made AI chips in a single location.

These chips are used for inference, the process by which AI generates responses. DeepSeek has also attempted training with Huawei chips, but still relies on Nvidia chips for training. Inference requires less computational load than training, making it easier to shift to Chinese-made chips.

The Ascend 950DT delivers 2 PFLOPS of FP8 performance and carries 144GB of proprietary HBM memory, 2.5 times faster than the previous 910C model. It is slated for release in the fourth quarter, but production of its proprietary HBM remains insufficient. This year's output is expected to reach only the hundreds of thousands range, meaning it could take more than a year to fill an order of 160,000 units.

Ulanqab is located 350 kilometers northwest of Beijing. Abundant wind and sunlight and an average annual temperature of 4.3 degrees Celsius make cooling costs low. The data center will have 1GW of capacity, with partial operations beginning in late 2027 or early 2028.

China's largest AI company is shifting its inference infrastructure to Chinese-made chips. Since inference accounts for the majority of AI operating costs, this weakens the practical effectiveness of U.S. export controls.

For Korea, this cuts both ways: if Huawei sources its own HBM, Korean memory makers' HBM sales to China could be shaken. However, as long as production remains insufficient, demand for Korean-made HBM should continue.

(Reported 2026-09-04)

Bloomberg <https://www.bloomberg.com/news/articles/2026-09-04/deepseek-plans-big-huawei-ai-chip-order-to-power-new-data-center>

Seeking Alpha <https://seekingalpha.com/news/4640307-deepseek-said-to-order-at-least-160k-huawei-ai-accelerators-for-new-data-center-report>

Yahoo Finance <https://ca.finance.yahoo.com/news/deepseeks-huawei-order-still-leaves-122342569.html>

Telecom, Networks & Edge AI

Chinese IoT and Edge AI Devices Expand into Europe at IFA 2026

At IFA 2026, 932 Chinese companies are showcasing smart home and Internet of Things (IoT) devices. Xiaomi is participating for the first time in IFA's 102-year history, announcing devices powered by its proprietary 3-nanometer XRing O3 chip and the European expansion of its Mijia smart home platform. The company is exhibiting 380 products under an ecosystem connecting "people, cars, and homes."

As of September 4, no new official announcements have been confirmed from China's telecom industry. The three major carriers' shift toward "token

factories" and the Ministry of Industry and Information Technology's AI+Telecom policy (2026-2028) remain per prior reporting.

(2026-09-04)

Seoul Economic Daily <https://en.sedaily.com/finance/2026/09/03/xiaomi-makes-ifa-debut-with-humanoid-robot-and-in-house-ai>

Hunan Provincial Department of Industry and Information Technology
https://gxt.hunan.gov.cn/gxt/xxgk_71033/gzdt/rdjj/202609/t20260904_34057098.html

Policy, Regulation & National Strategy

Exit and Entry Administration Regulation Takes Effect September 15 (D-10)

The Exit and Entry Administration Regulation, promulgated by the State Council, takes effect on September 15. The regulation, which governs departures and entries, contains 19 articles. It bars from leaving the country individuals who violate export control or technology transfer rules in ways that threaten industrial or technological security, with no time limit specified.

The AI sector is significantly implicated. Reports have already emerged of some AI engineers being barred from leaving China. A co-founder of Manus AI has reportedly been under an exit ban since March. Meta's \$2 billion acquisition proposal coming under Chinese authorities' investigation is part of the same context.

This regulation is the first to legally restrict the overseas movement of AI talent. The Ministry of Commerce determines who is subject to it. With no time limit, an effectively permanent ban is possible.

It will become harder for Korean companies to recruit Chinese AI talent, and could also affect the travel of already-hired personnel back to their home country.

(Effective 2026-09-15)

France 24 <https://www.france24.com/en/asia-pacific/20260818-clamping-down-china-tightens-exit-rules>

Globe and Mail <https://www.theglobeandmail.com/world/article-china-exit-bans-new-rules-september-15/>

DLA Piper

<https://knowledge.dlapiper.com/dlapiperknowledge/globalemploymentlatestdevelopments/2026/chinas-new-exit-and-entry-regulation-what-multinational-companies-need-to-know>

Ministry of Commerce Continues Discussions on Restricting Overseas Access to AI Models

The Ministry of Commerce is holding closed-door meetings with Alibaba, ByteDance, Zhipu, and others to discuss restricting overseas access to cutting-edge AI models. No finalized rules have emerged since reporting in July. Under discussion are export restrictions on weight downloads, data transfers, and agentic capabilities. Whether and when this will be implemented remains undetermined.

(Reported July 2026; no new announcement as of September 4)

Sina Finance <https://finance.sina.com.cn/wm/2026-07-09/doc-inihewsy7622485.shtml>

U.S.-China Tech Rivalry and Impact on Korea

Trump-Xi Summit Set for September 24 (D-19)

The Washington summit is 19 days away, with AI chips, electric vehicles, and rare earths as major agenda items. Ahead of the summit, a bilateral U.S.-China AI dialogue is scheduled for early September, with Treasury Secretary Bessent representing the U.S. side.

The Council on Foreign Relations (CFR) assesses that China holds the upper hand heading into this summit, citing the fact that 28 countries signed AI

partnerships with China at the WAIC conference in Shanghai in July. The U.S. appears to be scrambling to respond.

Korea is among the 25 countries that signed the "Pax Silica" agreement. Depending on the summit's outcome, the scope of AI chip export controls could change.

(D-19)

Fox News <https://www.foxnews.com/politics/trump-says-chinese-president-xi-jinping-visit-us-sept-24>

CNBC <https://www.cnn.com/2026/07/21/us-china-ai-talks-bessent.html>

CFR <https://www.cfr.org/articles/at-the-trump-xi-summit-china-will-have-the-upper-hand>

Nvidia's Hugging Face Acquisition and the China Access Question

Nvidia announced its acquisition of Hugging Face on September 3, valued at \$12.9 billion. Hugging Face is an AI platform hosting 18 million developers and 3 million models. In its SEC filing, Nvidia stated that blocking model access in regions including China could significantly harm its business.

A substantial number of Chinese AI developers download open-source models from Hugging Face. Following the acquisition, U.S. export controls could extend to platform access as well. As Alibaba's Bailian expands its role as a Chinese model hub, the divergence between U.S. and Chinese AI platforms is accelerating.

Korean companies may need to use both Hugging Face and Chinese model hubs, and platform fragmentation would raise development costs.

(Announced 2026-09-03)

NVIDIA <https://blogs.nvidia.com/blog/nvidia-to-acquire-hugging-face/>

SEC 8-K

<https://www.sec.gov/Archives/edgar/data/1045810/000104581026000078/nvda-20260902.htm>

CNBC <https://www.cnn.com/2026/09/03/nvidia-agrees-to-buy-hugging-face-for-almost-13-billion-ai-expansion.html>

BIS Cloud Remote Access Blocking Rule to Be Shared with Industry as a Draft in September

The U.S. Bureau of Industry and Security (BIS) is developing a rule to block Chinese companies from leasing GPUs through third countries, targeting circumvented leasing routed through data centers in Thailand and Singapore. A draft is expected to be shared with industry sometime in September.

Legal questions remain, as it is unclear whether remote access qualifies as an "export" under export control law. The House passed the Remote Access Security Act (RASA) 369-22, but the Senate has not yet voted on it.

(Reported 2026-08-29)

TechTimes <https://www.techtimes.com/articles/325957/20260829/commerce-drafts-ai-chip-rule-loop-hole-it-created-rescinding-biden-know-your-customer.htm>

Attorney Kim Kyung-jin's Commentary

DeepSeek's order of 160,000 Huawei chips marks a symbolic turning point. China's largest AI company has begun shifting its inference infrastructure to Chinese-made chips. Training still requires Nvidia chips. But since inference accounts for the majority of AI operating costs, the effectiveness of export controls is diminishing.

The Exit and Entry Administration Regulation is a mirror image of U.S. export controls: the United States blocks chips, and China blocks people. Korea sits at a crossroads exchanging tech talent with both countries and needs to watch where the two sets of regulations overlap.

At IFA Berlin, the expansion of Chinese robotics into Europe stands out. With the U.S. blocking imports, Europe is emerging as an alternative market. The Unitree hacking vulnerability could also spark security regulation discussions

in Europe. For Korean robotics companies, this presents both a market opportunity in Europe and a challenge in responding to security standards.

[Source Links]

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World Economy Weekly Trends

World Economy Weekly Trends **2026-09-05**

Period: 2026-08-29 05:30 KST - 2026-09-05 05:30 KST

Key flows this week

1. The armed clash between the United States and Iran flared up again after a month, and oil prices were the week's biggest variable. US forces struck Larak Island in the Strait of Hormuz on August 30, and Iran retaliated by targeting US bases and transiting vessels. Brent crude rose from \$88 per barrel on August 28 to about \$95 on September 2, its highest in six weeks, a weekly gain of about 8 percent.
2. Global government bond yields surged before easing somewhat later in the week. The US 10-year yield rose above 4.75 percent in late August, hit an intraday high of 4.81 percent on September 2, its highest since November 2023, then closed at 4.79 percent on September 4. Japan's 10-year yield topped 3 percent for the first time since 1996 on September 1, then fell to 2.97 percent on strong demand at a 30-year bond auction.
3. Expectations for a Fed September rate hike swung throughout the week. Chair Warsh's hawkish remarks at Jackson Hole and July personal consumption expenditures inflation of 3.7 percent pushed the probability up to 66 percent, before cautious comments from Williams and Governor Waller brought it back down to about 50 percent. A surprisingly strong jobs report on September 4 pushed it back up to around 52 percent by the end of the week.

4. The employment report diverged most sharply from expectations early in the week. August nonfarm payrolls came in at 162,000, triple the expected 53,000 and the largest gain since March. The unemployment rate was 4.1 percent, below the expected 4.2 percent. The August manufacturing ISM at 54.6 and services ISM at 55.4, both released mid-week, remained in expansion, but the employment components of both indexes showed contraction.

5. Inflation diverged by region. Eurozone consumer prices rose 3.3 percent in August, the highest this year, with energy prices up 14.3 percent from a year earlier. This figure cemented expectations for a European Central Bank rate hike on September 10.

6. AI-related earnings and acquisition news supported stocks late in the week. Dell announced \$60.9 billion in AI server orders and raised its annual revenue forecast to \$192 billion. Broadcom's AI revenue rose 221 percent to \$16.7 billion, and Nvidia agreed to acquire Hugging Face for about \$12.9 billion.

7. Monetary policy among major economies diverged. Canada held its rate at 2.25 percent for a seventh straight time, while New Zealand raised its rate to 2.75 percent. Finance ministers and central bank governors of the G20 also met.

Weekly market indicators

US stocks ended roughly flat after a week of ups and downs. The S&P 500 barely moved, from 7,711.76 on August 28 to 7,718.60 on September 4. The Nasdaq rose from 26,402.42 to 26,506.99, while the Dow fell from 53,559.99 to 53,414.25. Stocks slid through September 1 on the surge in bond yields, rebounded sharply on September 3 following Waller's remarks and AI earnings, then were pressured again on September 4 by the strong jobs report. The US 10-year yield rose from around 4.75 percent in late August to 4.79 percent on September 4. Japan's Nikkei 225 was weak, falling 1.97 percent on September 1 and 2.61 percent on September 2. The pan-European STOXX 600 slipped from around 655 to a one-month low. The yen weakened past 160 per dollar.

Central banks and policy

Divisions surfaced within the Fed. Chair Warsh was hawkish, while New York Fed President Williams and Governor Waller struck a more cautious tone. The probability of a September rate hike stood at roughly 50 to 52 percent as of the weekend, essentially a coin flip. Expectations for a European Central Bank rate hike on September 10 have become nearly certain. Canada held its rate at 2.25 percent, citing tariff and oil price risks, while New Zealand raised its rate to 2.75 percent, citing inflation.

Commodities and energy

Brent crude led the week, rising from \$88 to \$95. West Texas Intermediate also climbed to around \$90. Sharply reduced transits through the Strait of Hormuz raised supply disruption concerns and pushed prices higher. Gold fell from around \$4,450 per ounce on August 28 to \$4,336 on September 2 on rising rate-hike expectations, then recovered to about \$4,470 to \$4,500 on September 4 as those expectations receded following Waller's remarks.

What to watch next week

Watch for confirmation of an actual rate hike at the European Central Bank's meeting on September 10. US August consumer prices and the following Fed September meeting will determine the direction of the rate hike. Also watch developments in the Hormuz situation and whether oil prices rise further, along with the direction of Japan's ultra-long-term bond yields.

[Source Links]

- <https://www.cnbc.com/2026/09/04/jobs-report-august-2026.html>
- <https://www.thestreet.com/stock-market-today/stock-market-today-dow-jones-sp-500-nasdaq-updates-sept-04-2026>
- <https://tradingeconomics.com/united-states/government-bond-yield/news/525036>
- <https://tradingeconomics.com/commodity/brent-crude-oil>

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- Generated: 2026-09-05 05:30 KST

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Global Commodities and Agricultural Products Weekly Review

Global Commodities and Agricultural Products Weekly Review **2026-09-05**

Reference time: September 5, 2026, 09:00 (Korea time). Unless otherwise noted, prices are based on the September 4 closing price.

Sources: Trading Economics, Kitco, EIA, USDA, Barchart, Brownfield Ag News, Yahoo Finance. All figures were checked through web searches. Items that could not be verified are marked 'Unable to verify.'

1. Key Summary for the Week

This week's commodity market was driven by geopolitical risks in the Middle East. Crude oil rose 8~9% over the week after the United States struck Iran again and Iran targeted vessels transiting the Strait of Hormuz. WTI climbed to around 91 dollars per barrel, while Brent reached around 95 dollars.

Gold held near 4,443 dollars per ounce. Safe-haven demand supported gold prices. However, U.S. employment increased by 162,000 in August, far exceeding the forecast of 56,000, raising concerns about interest rate hikes. Silver fell about 5% for the week as a result.

Agricultural commodities moved in different directions. Coffee, orange juice, and sugar fell sharply from a year earlier. Cotton rose more than 34% from a year earlier. Grains came under profit-taking pressure ahead of the U.S. Department of Agriculture's (USDA) World Agricultural Supply and Demand Estimates report (WASDE).

2. Overall Commodity Price Change Table

Format: Commodity | Current Price | Weekly | Monthly | 3-Month | 1-Year | Trend

(Most 3-month figures are marked 'Unable to verify' because they could not be confirmed. Some monthly and weekly changes are figures compiled by Trading Economics.)

[Precious Metals]

Gold | 4,443.53 dollars/oz | Unable to verify | Unable to verify | Unable to verify | Unable to verify(sharply higher year on year) | Bullish

Silver | 66.15 dollars/oz | -4.96% | +6.66% | Unable to verify | Unable to verify | Neutral~bearish

Platinum | 1,813.70 dollars/oz | Unable to verify | +3.82% | Unable to verify | Unable to verify | Bullish

Palladium | 1,423 dollars/oz | Unable to verify | +3.87% | Unable to verify | +28.60% | Bullish

[Industrial Metals]

Copper(COMEX) | 6.60 dollars/lb | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Neutral

Aluminum(LME) | 3,293~3,317 dollars/t | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Bullish

Nickel | 16,680 dollars/t | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Bearish

Zinc(LME) | 3,877 dollars/t(about 1.76 dollars/lb) | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Neutral

Iron ore | 97.72 dollars/t(September 2) | Unable to verify | +4.33% | Unable to verify | -5.35% | Neutral

[Energy]

WTI crude oil | 91.20 dollars/bbl | about +9% | Unable to verify | Unable to verify | Unable to verify | Bullish

Brent crude oil | 95.23 dollars/bbl | about +8% | Unable to verify | Unable to verify | Unable to verify | Bullish

Natural gas(Henry Hub) | 2.93 dollars/MMBtu | Unable to verify | +8.86% | Unable to verify | -4.00% | Neutral~bullish

Heating oil | 4.55 dollars/gal | Unable to verify | +19.76% | Unable to verify | +98.79% | Bullish

Gasoline | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Unable to verify

Coal | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Unable to verify

[Agricultural Commodities]

Wheat(CBOT December futures) | 7.34 dollars/bu | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Neutral

Corn(CBOT December futures) | 5.36¾ dollars/bu | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Neutral

Soybeans(CBOT November futures) | 13.09¾ dollars/bu | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Neutral

Rice(November futures) | 15.87 dollars/cwt | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Neutral

Coffee | 297.45 dollars/lb | Unable to verify | -4.50% | Unable to verify | -22.86% | Bearish

Sugar(No. 11) | about 18 cents/lb | Unable to verify | Unable to verify | Unable to verify | -9.03% | Bearish

Cocoa | 6,181.70 dollars/t | Unable to verify | +5.10% | Unable to verify | -16.26% | Neutral

Cotton | 86.74 dollars/lb | Unable to verify | +4.48% | Unable to verify | +34.61% | Bullish

Orange juice | 155.81 dollars/lb(September 3) | Unable to verify | -2.43% | Unable to verify | -30.24% | Bearish

[Supporting Indicators]

Dollar Index(DXY) | 99.00(September 3) | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Neutral

U.S. 10-year Treasury yield | 4.79% | Unable to verify | Unable to verify | Unable to verify | Unable to verify | Bullish

Baltic Dry Index(BDI) | about 3,157 | Unable to verify | +15.56% | Unable to verify | Unable to verify | Bullish

3. Precious Metals Analysis

Gold traded near 4,443 dollars per ounce. On September 3, it rose 2.06% in one day to 4,477 dollars. Tensions in the Middle East increased safe-haven demand. However, strong U.S. employment data raised concerns about interest rate hikes and limited gold's gains.

Silver fell 1.22% in one day to 66.15 dollars per ounce on September 4. It declined about 5% for the week. The monthly change was a 6.66% gain, showing a mixed trend. Silver is sensitive to interest rates and was more volatile than gold.

Platinum and palladium fell about 1% in one day to 1,813.70 dollars and 1,423 dollars, respectively. Both metals gained more than 3% for the month. Palladium is 28.60% higher than a year earlier.

4. Industrial Metals Analysis

Copper edged higher to 6.60 dollars per pound on COMEX. LME spot copper was around 6.54 dollars. Supply constraints and demand combined to support prices.

Aluminum traded around 3,300 dollars per t on the LME. Aluminum and copper have been moving toward annual record highs in 2026. The market expects both metals to rise about 20% this year.

Nickel fell to 16,680 dollars per t, its lowest level since early July. Zinc stood at 3,877 dollars per t.

Iron ore remained below 100 dollars at 97.72 dollars per t. It is 5.35% lower than a year earlier. Ample supply is outweighing weak demand.

5. Energy Analysis

Crude oil led this week's gains. The United States struck Iran again after a lull of about one month. Iran responded by targeting U.S. military bases and vessels transiting the Strait of Hormuz. A significant share of the world's crude oil passes through the Strait of Hormuz. These tensions lifted WTI by about 9% and Brent by about 8% for the week.

WTI closed at 91.20 dollars per barrel, while Brent closed at 95.23 dollars. Their daily declines were limited to 0.11% and 0.31%, respectively. Most of the weekly gains accumulated early in the week.

Natural gas(Henry Hub) edged higher to 2.93 dollars per MMBtu. It rose 8.86% for the month but remained 4.00% lower than a year earlier. Heating oil reached 4.55 dollars per gallon, 98.79% higher than a year earlier. Disruptions to refined-product supplies sharply increased heating oil prices.

6. Agricultural Commodities Analysis

Grains came under profit-taking pressure ahead of WASDE. December wheat fell 20¼ cents in one day to 7.34 dollars per bushel. December corn fell 4 cents to 5.36¾ dollars, while November soybeans fell 6½ cents to 13.09¾ dollars. November rice rose 17 cents to 15.87 dollars. USDA will release the next WASDE on September 11. The report will reassess crop and inventory forecasts.

Agricultural commodities moved in different directions during the first half of 2026. Wheat, rice, and cotton rose because of weather risks and geopolitical uncertainty. Coffee, sugar, and cocoa declined.

Coffee stood at 297.45 dollars per pound, 22.86% lower than a year earlier. Vietnamese exports increased, and Brazil is expected to have a strong harvest. Orange juice stood at 155.81 dollars per pound, 30.24% lower than a year earlier. Cocoa was 16.26% lower than a year earlier at 6,181.70 dollars per t, although it gained 5.10% for the month. Sugar traded around 18 cents per pound, about 9% lower than a year earlier. Rainfall in Brazil increased sugar supplies.

Cotton stood at 86.74 dollars per pound, 34.61% higher than a year earlier. Frost and drought risks in the United States, along with higher polyester production costs, revived demand for cotton.

In terms of the impact on food prices, declines in coffee, orange juice, and sugar ease cost pressures for processed foods and beverages. By contrast, stronger cotton prices raise clothing costs. With grains showing no large movements, bread and feed prices are likely to remain relatively stable for the time being.

7. TOP 10 Commodities with the Largest Changes from a Year Earlier (Based on Verified Figures)

5 largest increases

- 1) Heating oil +98.79%
- 2) Cotton +34.61%
- 3) Palladium +28.60%
- 4) Gold (sharply higher year on year, exact % Unable to verify)
- 5) Silver (higher year on year, exact % Unable to verify)

5 largest declines

- 1) Orange juice -30.24%
- 2) Coffee -22.86%
- 3) Cocoa -16.26%
- 4) Sugar about -9.03%
- 5) Iron ore -5.35%

8. Price Outlook for Next Week

Precious metals: Neutral~bullish. If tensions in the Middle East continue, demand for gold will remain supported. However, strong employment and concerns about interest rate hikes will limit the upside. Volatility may increase.

Industrial metals: Neutral. Supply constraints support copper and aluminum prices. Weak demand continues to weigh on nickel and iron ore.

Energy: Higher volatility. Developments in the Strait of Hormuz are moving prices on a daily basis. If signs of easing tensions emerge, prices could reverse quickly.

Agricultural commodities: Neutral~bearish. The WASDE results will determine the direction of grains. Coffee, sugar, and orange juice remain under bearish pressure as supplies recover.

9. Events to Watch Next Week

- September 11: USDA WASDE World Agricultural Supply and Demand Estimates release (determining the direction of grains, soybeans, coffee, and sugar)
- During next week: Release of U.S. August Consumer Price Index(CPI) and Producer Price Index(PPI) (directly affecting the interest rate path)
- Every Wednesday: EIA crude oil inventories (next release expected around September 10)

- Every Thursday: EIA natural gas storage (next release expected around September 11)

- Ongoing: Strait of Hormuz and Middle East developments, OPEC+ developments, China's manufacturing PMI, and weather in major producing regions

(The exact dates of the CPI, PPI, and EIA releases need to be reconfirmed against the agencies' schedules.)

10. Overall Conclusion

Geopolitics rewrote the price board this week. Conflict in the Middle East lifted crude oil and safe-haven assets, while strong U.S. employment data weighed on silver by raising interest rate concerns. Industrial metals lacked a clear direction as supply constraints and weak demand offset each other.

Agricultural commodities diverged, with coffee, sugar, and orange juice falling while cotton rose. Next week's direction will be determined by WASDE, U.S. inflation indicators, and developments in the Strait of Hormuz.

This report is for informational purposes. It does not recommend any specific trade.

[Sources and Search Keywords]

- Trading Economics pages for each commodity(gold, silver, platinum, palladium, copper, iron ore, natural gas, heating oil, coffee, cocoa, cotton, orange juice, wheat, baltic)

- Kitco precious metals prices, Yahoo Finance silver prices(September 1~3)

- Brownfield Ag News grain and livestock closing prices(September 4, 2026), Grain Central Daily Market Wire(September 4, 2026)

- EIA Today in Energy Prices, Forbes Advisor crude oil prices(September 4, 2026)

- Search keywords: gold silver platinum palladium price weekly change 2026-09-05 / copper aluminum nickel zinc iron ore price 2026-09-05 / WTI Brent

natural gas heating oil price weekly 2026-09-05 / wheat corn soybean rice
coffee sugar cocoa cotton orange juice price 1 year change 2026-09-05 / dollar
index US 10 year treasury yield 2026-09-04 / baltic dry index 2026-09

[Source Links]

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International Conflict Briefing

International Conflict Briefing 2026-09-05

Period: 2026-09-04 09:20 KST - 2026-09-05 09:20 KST

Today's Key Developments

1. A Russian drone struck the headquarters of the Security Service of Ukraine (SBU) in central Kyiv on the afternoon of the 4th. The Kyiv City Military Administration said at least 12 people were injured.
2. Ukrainian forces were ordered to halt fighting from September 5 to 8 to coincide with a visit by US envoys. Russia sent drones toward Kyiv shortly after midnight on the 5th.
3. The General Staff of the Ukrainian Armed Forces announced that the Norski refinery in Nizhny Novgorod Oblast and the Ust-Luga complex in Leningrad Oblast have ceased operations. This is a Ukrainian-side announcement.
4. The Israeli military struck the area near the Ali al-Taher ridge close to Nabatieh in southern Lebanon, killing 2 people. Lebanon's state news agency reported this.
5. A settler attack in the West Bank village of Umm al-Khair injured 1 child. A senior Israeli military officer said 5 new settlement outposts were established within one week.
6. US President Trump said the United States could soon strike Iran's Pickaxe Mountain facility. The US Treasury Department sanctioned one Turkish bank, saying it was linked to the Iranian government.

Changes by Front

In the Russia-Ukraine war, the attack on central Kyiv overlapped with Ukraine's order for a temporary halt to fighting. A Russian drone struck the SBU headquarters building in the Shevchenkivskiy district at around 3 p.m. on the 4th. President Zelensky said the target was the office of Acting SBU Head Poklad. Ukrainian forces decided to halt attacks from the 5th to the 8th, when envoys Witkoff and Kushner visit Moscow and Kyiv. The envoy delegation is scheduled to visit Kyiv on the 6th. The Ukrainian General Staff announced that two Russian refineries stopped operating as a result of drone attacks on August 26 and September 1. There is no independent confirmation yet.

On the Lebanon front, the Israeli military said it had taken control of the Ali al-Taher ridge. Hezbollah did not confirm this. Israeli Defense Minister Katz said he would prevent the enemy from re-establishing itself in the area.

Civilian Casualties and Humanitarian Situation

Of the 12 people injured in the attack on the Kyiv SBU headquarters, 7 were taken to hospital. The strike near Nabatieh in Lebanon killed 2 people riding a motorcycle. In Umm al-Khair in the West Bank, settlers cut a protective fence and threw objects at Palestinian children on a soccer field. The Israeli military detained and then released 1 Palestinian resident, and did not detain any settlers.

Diplomacy, Sanctions, and Military Aid

Ahead of the US envoy delegation's visit to Moscow and Kyiv, Ukraine was the first to propose a halt to fighting. There has been no announcement that Russia has responded to it. The US Treasury Department placed a Turkish bank on its sanctions list, citing links to the Iranian government. President Trump said the Strait of Hormuz is under US control.

Points to Watch in the Next 24 Hours

1. Whether Russia reciprocates Ukraine's halt to fighting from the 5th to the 8th, and whether strikes on Kyiv continue.
2. The outcome of the US envoy delegation's talks in Moscow, and whether the schedule for the Kyiv visit on the 6th is kept.
3. Whether the United States actually strikes Iran's Pickaxe Mountain facility, and whether Iran continues attacks on merchant ships in the Gulf region.
4. How Hezbollah responds to the Israeli military's claim of taking control of the Ali al-Taher ridge.

[Source Links]

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- 2. The Kyiv Independent, Ukrainian army ordered to halt fighting:
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- 3. The Kyiv Independent, announcement that 2 Russian refineries ceased operations:
<https://kyivindependent.com/2-russian-oil-refineries-cease-operations-after-ukrainian-strikes-general-staff-says/>
- 4. The Times of Israel September 4 liveblog, strike near Nabatieh in Lebanon and settler attack in the West Bank: <https://www.timesofisrael.com/liveblog-september-04-2026/>
- 5. Al Jazeera Iran war liveblog, Trump's Pickaxe Mountain remarks and Turkish bank sanctions: <https://www.aljazeera.com/news/liveblog/2026/9/4/iran-war-live-us-rules-out-iran-talks-until-ship-attacks-stop>
- Generated: 2026-09-05 09:30 KST

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Global Incidents and Disasters Briefing

Global Incidents and Disasters Briefing 2026-09-05

Basis: 2026-09-04 07:40 KST to 2026-09-05 07:40 KST. 13 items.

Today's summary

1. The death toll from flooding in Nepal has passed 1,300.
2. The Krakatau volcano in Indonesia erupted violently.
3. Hurricane Lowell approached Hawaii, prompting a state of emergency.

Earthquakes and volcanoes

1. Major eruption of the Krakatau volcano in Indonesia

Occurred at 02:50 KST on September 5, 2026 (00:50 local time).

The Anak Krakatau volcano in the Sunda Strait, Indonesia, erupted.

Volcanic ash rose to an altitude of 15 kilometers.

Casualties are still being tallied.

Authorities maintained volcano alert level 3.

Access within a 3-kilometer radius of the crater was restricted.

Heavy rain, floods, and typhoons

2. Typhoon Koinu, the 24th typhoon, approached Okinawa, Japan

Occurred at 21:00 KST on September 4, 2026 (21:00 local time).

Typhoon Koinu, the 24th typhoon of the season, approached Okinawa, Japan.

Its central pressure was recorded at 990 hectopascals.

Landslide damage is still being tallied.

The Japan Meteorological Agency issued a special landslide warning.

Ferry and flight operations were suspended.

3. Category 4 Hurricane Lowell approached Hawaii

Occurred at 21:00 KST on September 4, 2026 (02:00 local time).

Hurricane Lowell approached the western Hawaiian Islands.

It is accompanied by winds exceeding 200 kilometers per hour.

This follows previous reports, with the storm maintaining its intensity.

Casualties are still being tallied.

The state of Hawaii declared a state of emergency.

4. Heavy rain and landslides in the North Korea-Russia border area

Occurred at 07:27 KST on September 5, 2026 (07:27 local time).

Heavy rain fell in the Rason area on the North Korea-Russia border.

Floods and landslides occurred in the lower Tumen River region.

An estimated several hundred people have been displaced.

North Korean authorities have begun emergency recovery work.

5. Nepal's death toll from major flooding passes 1,300

Reported at 04:46 KST on September 5, 2026 (01:31 local time).

The death toll from flooding in Nepal has passed 1,300.

This follows the previous day's reported death toll, which has since risen further.

The number of displaced people has also surpassed 1.6 million.

The United Nations requested 49.6 million dollars in relief funding.

Two workers trapped at a hydroelectric plant were rescued alive after nine days.

Heavy snow, cold waves, and heat waves

6. Spain sets new September heat record at 45.7 degrees Celsius, Belgium tallies deaths

Reported at 03:36 KST on September 5, 2026 (20:36 local time).

Temperatures in southern Spain rose to 45.7 degrees Celsius.

This follows earlier reports of a Western European heat wave, with a new peak temperature now recorded.

Belgian health authorities tallied 3,000 deaths from the summer heat wave.

Governments have strengthened measures to prevent heat-related illness.

Wildfires

7. Smoke from Indonesian wildfires spreads to Malaysia, prompting state of emergency

Reported at 04:57 KST on September 5, 2026 (03:57 local time).

Smoke from wildfires in Indonesia spread to Malaysia.

This follows earlier reports of fires in Sumatra, which have expanded around the new capital area.

Casualties are still being tallied.

Malaysia's Sarawak state declared a state of emergency.

Indonesian authorities deployed firefighting aircraft.

Accidents

8. Explosion at soap factory in Jakarta, Indonesia kills 3

Occurred at 00:08 KST on September 5, 2026 (22:08 local time).

An explosion occurred at a soap factory in Indonesia.

Three people died, including an employee who jumped from the sixth floor to escape the flames.

The number of injured is still being tallied.

Fire authorities extinguished the blaze and began an investigation.

9. Small aircraft crash in Tampa, United States kills 2 medical personnel

Occurred at 07:14 KST on September 5, 2026 (18:14 local time).

A small aircraft crashed in Tampa, Florida, United States.

Two medical personnel aboard were killed.

The United States Federal Aviation Administration launched an investigation into the cause.

10. Rail crossing collision in County Mayo, Ireland kills 12-year-old

Occurred at 04:53 KST on September 5, 2026 (20:53 local time).

A train struck a vehicle at a level crossing in County Mayo, Ireland.

A 12-year-old boy in the vehicle died.

Police halted rail operations and investigated the scene.

11. Partial collapse of commercial building in West Baltimore, United States

Occurred at 03:48 KST on September 5, 2026 (14:48 local time).

The exterior wall of a commercial building collapsed in West Baltimore, United States.

Workers evacuated and there were no casualties.

The fire department closed surrounding roads and conducted a safety inspection.

Infectious diseases

12. Ebola cases surge in Democratic Republic of the Congo, deaths pass 3,000

Reported at 05:46 KST on September 5, 2026 (22:46 local time).

Ebola cases in the Democratic Republic of the Congo rose by 92 in a single day.

This follows a previous warning of unconfirmed transmission, with the outbreak continuing to spread.

The cumulative death toll has passed 3,000.

The World Health Organization launched an emergency vaccination campaign.

13. Measles outbreak spreads nationwide in the United States, cumulative cases pass 3,100

Reported at 03:45 KST on September 5, 2026 (14:45 local time).

Measles cases in the United States have passed 3,100.

This follows an earlier report of 500 cases in Pennsylvania, with the outbreak spreading nationwide.

The death toll is still being tallied.

The United States Centers for Disease Control and Prevention urged vaccination.

[Source Links]

- 1. TopStarNews, <https://www.topstarnews.net/news/articleView.html?idxno=15698308>
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- 4. SPN Seoul Pyongyang News, <https://www.spnews.co.kr/news/articleView.html?idxno=81942>

- 5. ReliefWeb, <https://reliefweb.int/report/nepal/nepal-flood-response-situation-report-2-31-august-2026>
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- 13. CDC, <https://www.cdc.gov/measles/data-research/index.html>

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