

THE/BAHNSEN GROUP

A LOOK AT THE ECONOMY & MARKETS

SCOTTSDALE, AZ
SEPTEMBER 16TH, 2026

2026 THEMES

IRAN & OIL

2026 THEMES

AI DEPENDENCIES &
VULNERABILITIES

2026 THEMES

IS AI CAPEX A GOOD THING
OR BAD THING?

2026 THEMES

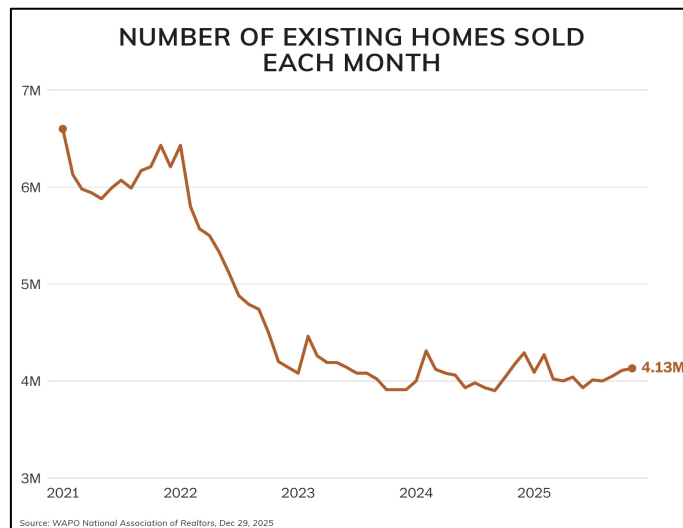
ECONOMIC TUG-OF-WAR: **LABOR**

2026 THEMES

ECONOMIC TUG-OF-WAR: **CAPEX**

2026 THEMES

HOUSING WILL
GET CHEAPER
THIS YEAR



2026 THEMES

THE IMPACT OF A NEW FED

THANK YOU



The Dividend Cafe

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